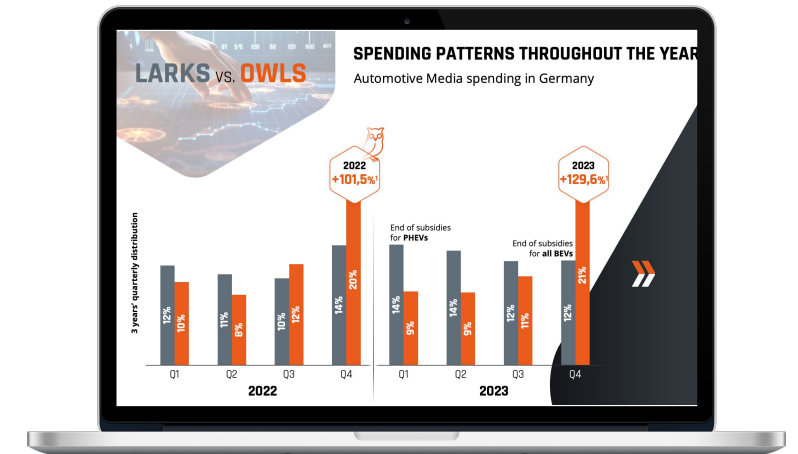


Automotive Marketing Benchmark



July 2024

56M € PER YEAR DOWN THE DRAIN?

Comparative analysis of spending patterns: uncovering opportunities for improved funnel efficiency

OWLS

COST PER
INDICATION



Cost per
Website Visit

+ 121%

Cost per
Sale

+ 134%

Definition of owls:

Costs for OEMs that focus marketing spend in Q4 vs. average in Q1 to Q3 of the same year.



Q4

EXECUTIVE SUMMARY

Half of observed automotive brands spend their media budgets evenly throughout the year, while the other **ramp up their media spending in the final quarter of the year** considerably.

Our analysis shows that this Q4 spending increase is not linked to rising customer demand and drives up costs **without generating more business.**

We believe that if these OEMs used part of their Q4 spending to **increase marketing budgets in the previous three quarters**, they could noticeably **boost marketing effectiveness and efficiency** to drive leads and sales.

OPTIMIZING MEDIA SPEND BASED ON ONLINE VISITS & SALES

By measuring performance and controlling customer touchpoints, manufacturers are seeking to make their marketing spending more efficient.

Automotive marketing is becoming more **data-driven**: OEMs now have far greater transparency over how their campaigns perform across channels and how users react to their marketing activities. They are also building capabilities to better integrate analytics into their marketing planning.

At the same time, OEMs are expanding their **control of customer touchpoints**. With an increasing part of the sales funnel happening online, OEMs are working to direct this traffic to their own channels, including National Sales Company websites and apps, building up direct sales models.



OEMs, which we define as owls:



+115%

average increase in
6 major brands' media spend in Q4 over the rest of the year's quarterly average (2022-2023).

HOW DOES MEDIA SPEND IMPACT WEBSITE PERFORMANCE AND VEHICLE SALES?*

We have looked at a range of manufacturers, compared their **net media spend** in the German market over the last three years, and examined the relationship to website visits, **conversion rates**, and vehicle sales.

We found that many OEMs spend up to half of their annual media budgets in Q4, the most expensive quarter for advertising. While companies fight for consumer attention before Christmas, cost-per-click skyrockets. Yet, for OEMs, this **does not translate into a corresponding sales peak**.

Although throughout the year, our analysis showed a connection between higher media spend and increasing web visits, and between **web visits and new vehicle registrations**, the pattern did not hold for the media spend spike in Q4.

*Source: Berylls Research and Database 2024.

BASED ON THEIR SPENDING PATTERNS, WE HAVE CATEGORIZED OEMS INTO TWO GROUPS:

LARKS

Plan early and long-term and allocate their media budget **evenly across the year.**



“ **BE SMART,
BE A LARK?** ”

Is it true that the early bird catches the worm – and converts the lead? Let’s look at the data and find out.

OWLS

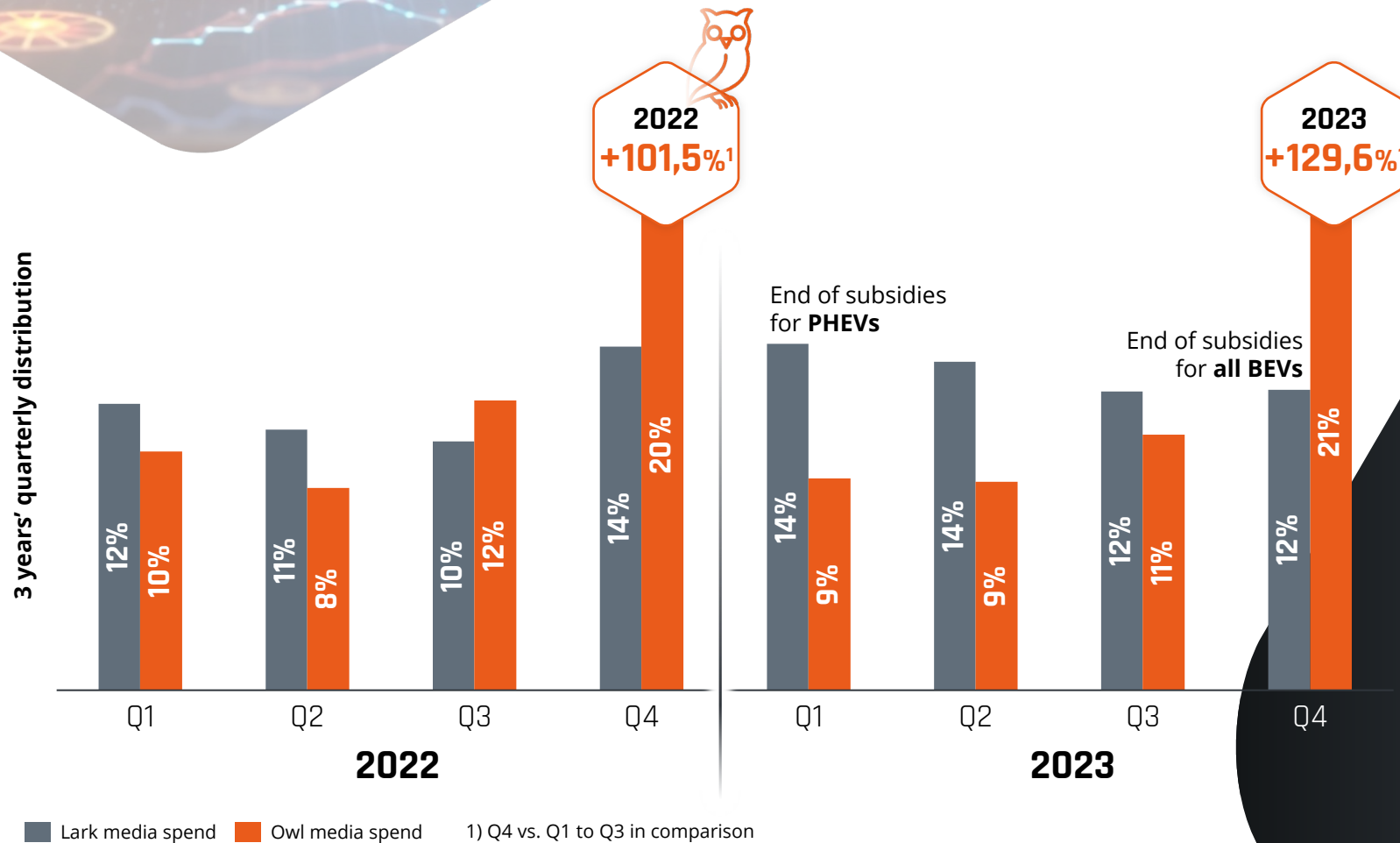
Spend their media budget with a **focus on the last quarter.**



LARKS vs. OWLS

SPENDING PATTERNS THROUGHOUT THE YEAR

Automotive Media spending in Germany



Larks tend to allocate only slightly more budget in Q4, while Owls' spending peaked **significantly in Q4** in 2022 and 2023.

You would expect this spending to result in a **positive effect on web visits and sales**. But does it in reality?

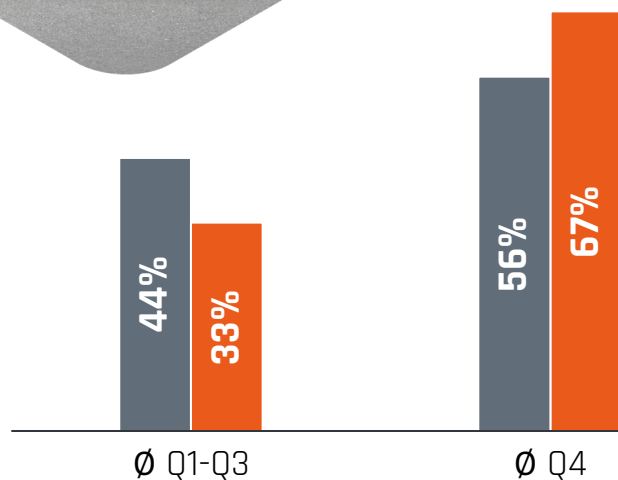
LET'S SEE...

LARKS vs. OWLS



...NOR ON SALES

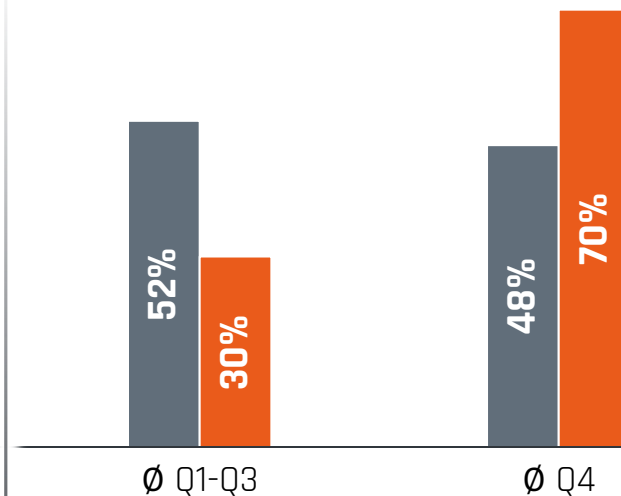
Exploring the data: A detailed journey through **OWL-DATA** insights



2022

Q1-Q3 vs. Q4 **OWL** comparison

Media Spend	+ 101,5%
Web Visits	- 0,5%
Sales	+ 23,4% End of subsidies



2023

+ 129,6%
+ 3,8%
- 1,8%

■ Lark media spend ■ Owl media spend 1) Q1 to Q3 vs Q4 in comparison

Owl segment: **Media spendings surged by around 117%** over two years.

However, **web visits and sales remained stagnant** during this period.

Notably, a disconnect exists between Owl's media spending and its web visits/sales performance.

OWLS CAN ENHANCE MARKETING EFFICIENCY BY REALLOCATING Q4 BUDGETS TO Q1-Q3.



THE RESULT IS HUGE COST PER VISIT AND SALES METRICS FOR OWLS



Larks

2,9€

2,6€

-9,1%



Owls

1,3€

2,9€

+121,2%

Q 1-3

Q4

Raise in %



OWLS CAN ENHANCE MARKETING EFFICIENCY BY REALLOCATING Q4 BUDGETS TO Q1-Q3.



HOW TO SPEND MARKETING BUDGETS BETTER

POTENTIAL REASONS

- Marketing orchestration by budgets – not targets and efficiency
- End of year money from HQ (which was hold back)
- No End-2-End transparency of marketing planning and financial tracking
- End of year spending by Markets to reduce budget cuts

OUR VIEW

If the Owls orchestrated their marketing planning better and used some of their Q4 budgets in Q1-Q3, they could noticeably increase their marketing efficiency.

HOW
berylls
by AlixPartners

HELPS YOU TO
REDUCE YOUR
WASTE

POTENTIAL
COST SAVING

for Owls

56 Mio €

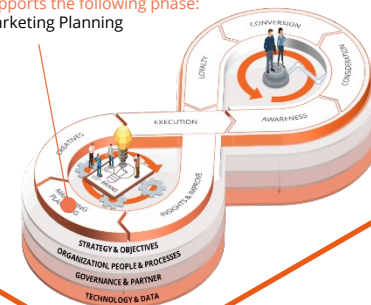
per year

in Germany alone
(based on Cost per
Website Visit)

Berylls by AlixPartners Infinity Loop

CLICK 

Supports the following phase:
Marketing Planning



- 1 Identify 'money pits' where marketing **budget is being wasted**
- 2 Enable **cross-silo collaborative marketing planning** between corporate HQ, the national sales company, agency and retailer
- 3 Enable orchestration and transparency over marketing spending from **one single & internal source**
- 4 **Close the loop**, between marketing planning to financial tracking and campaign performance insights



GET IN TOUCH!

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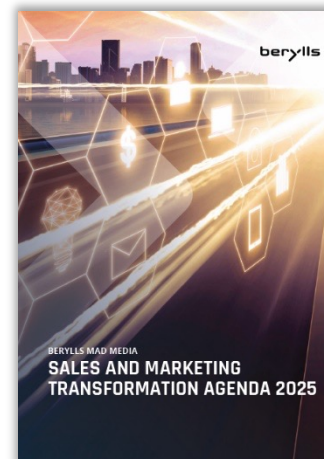


MORE ABOUT THE AUTOMOTIVE MARKETING & SALES BENCHMARK

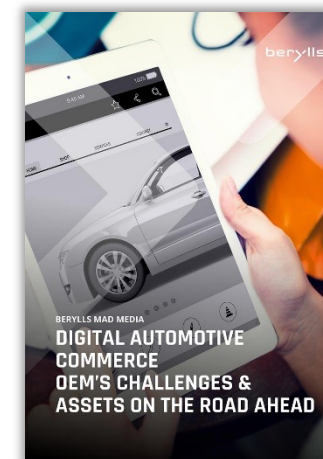
Berylls Automotive Marketing & Sales Benchmark aims to quantify the quality of marketing activities to drive digital sales. By benchmarking and creating transparency we enable you to continuously improve. We have information about **more than 25 Brands**, regarding budgets allocation, marketing performance and customer experience.

Reach out to us to discuss where you are and how you can improve your **BUDET EFFICIENCY AND EFFECTIVENESS**.

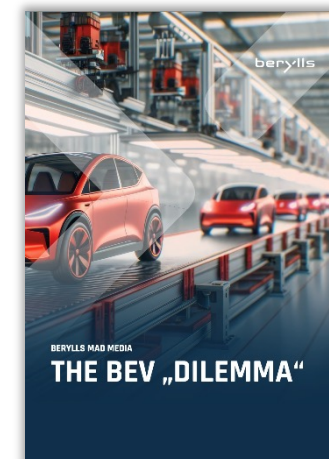
MORE ABOUT MARKETING PLANNING



[Sales and marketing transformation agenda 2025](#)



[Digital automotive commerce OEM's challenges & assets on the road ahead](#)



[The BEV "Dilemma"](#)