AlixPartners | berylls by AlixPartners

**BERYLLS BY ALIXPARTNERS INSIGHT**

# AUTOMOTIVE MARKETING BENCHMARK 2024

# AUTOMOTIVE MARKETING BENCHMARK 2024

## KEY HIGHLIGHTS & FINDINGS

### AUTOMOTIVE MARKETING LANDSCAPE GERMANY 2024

1

### BUDGET

Overall **tighter budgets** cause brands to save on **media spend**, **on average - 5%** (‘24 vs. ‘23)

2

### FUNNEL

Overall **funnel effectiveness decreasing:** YoY 12% more Website Visits required per unit Sale indicate **increased competition** / cross-browsing

3

### MEDIA-MIX

**Balanced media mix as efficiency driver** with ~50% less spend required for comparable performance than brands w/ overly Digital or Non-Digital

4

### TOP PERFORMER

**Škoda** leads the overall benchmark score, followed by **Mercedes-Benz.** **Cupra** takes third place, with a significant increase compared to 2023

5

### SEGMENTS

**New entrants** with significantly **higher media invest per unit sold (app. 2.000 EUR/unit vs. 200 EUR/unit)** threaten incumbents’ market share

# BERYLLS BY ALIXPARTNERS AUTOMOTIVE MARKETING BENCHMARK (BAMB)


The BAMB score measures and compares the **Marketing and Sales** performance of OEMs in Germany. It considers the whole Marketing and Sales funnel – **from Website Visits to Sales** – as well as the **Marketing Budget**. It helps brands to benchmark themselves against direct or potential competitors.

## SCOPE

German market

ALFA ROMEO, AUDI, BMW, BYD, CITROEN, CUPRA, DS, DACIA, FORD, GENESIS, HONDA, HYUNDAI, JAGUAR

JEEP, KIA, SMART, SEAT, LAND ROVER, MAZDA, MERCEDES, MG, MINI, MITSUBISHI, FIAT, VOLKSWAGEN

NIO, NISSAN, OPEL, POLESTAR, PEUGEOT, PORSCHE, SKODA, SUZUKI, TOYOTA, VOLVO

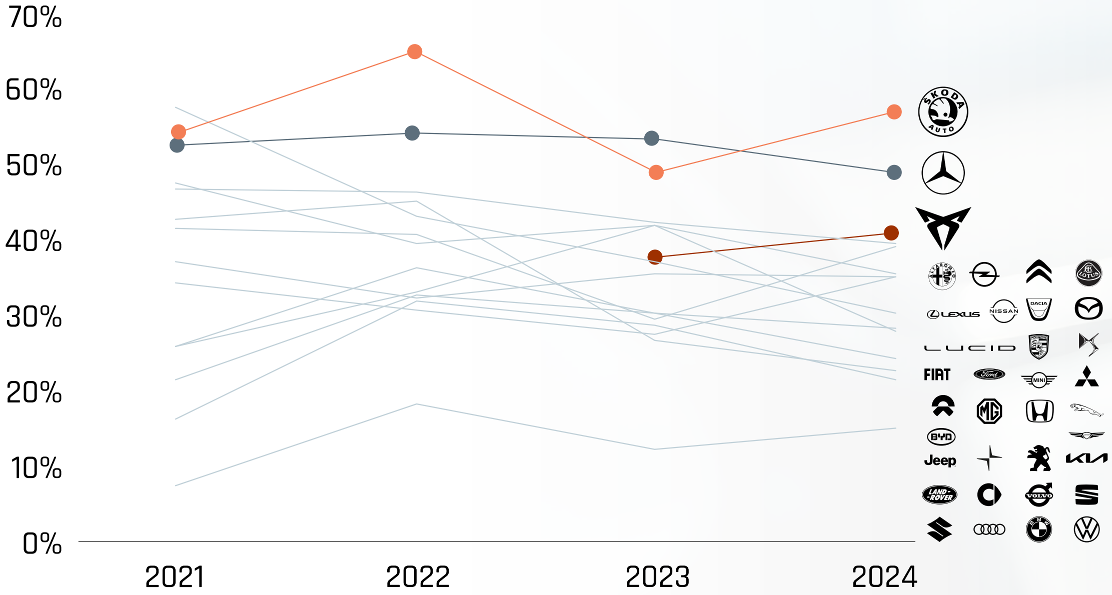
## DATA SOURCES

berylls by AlixPartners, similarweb, Nielsen, KBA

# THE OVERALL SCORE: MARKET DEVELOPMENT OF FOUR YEARS SHOWS CLEAR FRONTRUNNERS

### TOTAL BENCHMARK SCORE

(selected brands across all categories; range: 0-100%[1])




Source: Berylls by AlixPartners; 1: Cupra data available since 2023

The BAMB total score is a **composite of three subscores** – Performance, Conversion, and Efficiency, that ranks the relative Marketing and Sales excellence of over 35 OEMs. The benchmark captures the **overall demand generation, funnel effectiveness, and funnel efficiency.**

Since 2022, **Škoda and Mercedes-Benz** have been constantly leading the race for the first place in the overall ranking. In this year's results, **Škoda takes first place** following an increase from 2023. The brand sets the benchmark with its marketing effectiveness and efficiency. **Cupra** moves up from sixth to third place, reflecting a strong improvement in its funnel effectiveness. **New entrants** to the German market (e.g., NIO, MG) are positioned in the lower two thirds of the ranking, primarily driven still comparatively low Website traffic and sales when measured against incumbents.

# TOTAL BENCHMARK SCORE

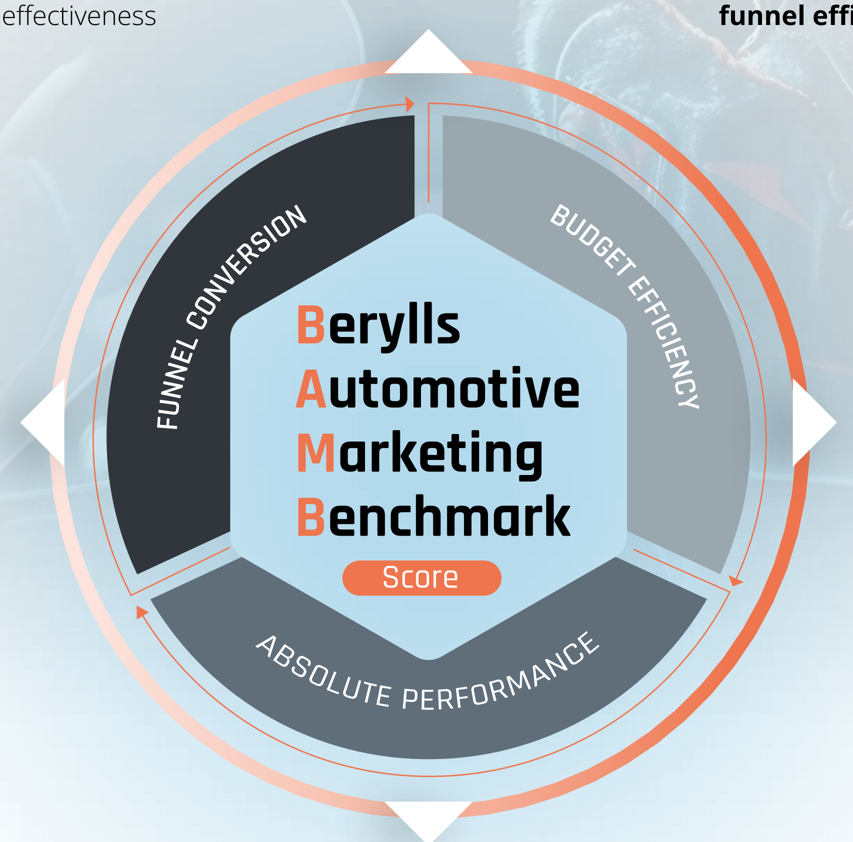
## BERYLLS BY ALIXPARTNERS SCORING LOGIC

### CONVERSION

Assessment of **ability to convert demand** (e.g., from Website Visit to Started Configuration), as proxy for overall funnel effectiveness

### EFFICIENCY

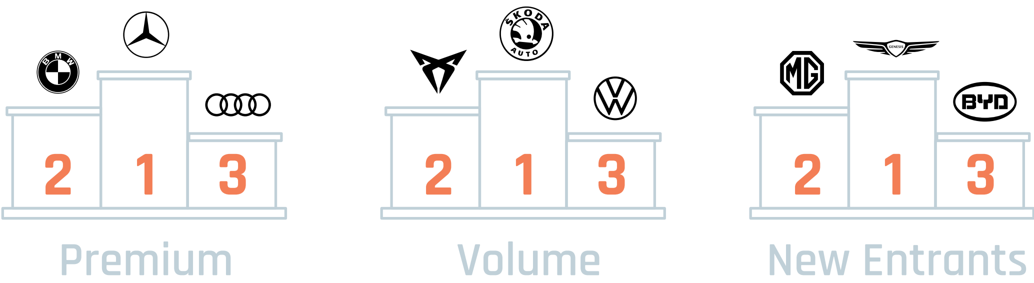
Evaluation of **required invest** to achieve a given performance (e.g., Media spend per unit sold), as proxy for **overall funnel efficiency**




### PERFORMANCE

Measurement of **absolute end-to-end funnel** performance (e.g., Website traffic) as proxy for **overall demand generation**

# THE SUBCATEGORIES: MARKET SEGMENTS AND REGIONALITY DOMINATED BY INCUMBENTS




**In addition to the overall brand ranking, a more detailed analysis by market segment and OEM regional origin reveals distinct performance patterns.** As previously highlighted, Škoda and Mercedes-Benz lead the overall benchmark, each excelling within its respective category. Mercedes-Benz ranks highest among both premium and German manufacturers, driven by exceptional absolute funnel performance. In contrast, Alfa Romeo and Lexus are among the weakest premium OEMs, with persistent underperformance in both demand generation and conversion efficiency.

Škoda sets the standard within both the volume and European segments, distinguished by superior funnel effectiveness and operational efficiency. At the opposite end of the volume spectrum, brands such as Nissan, Jeep, and Peugeot face challenges similar to their underperforming premium peers, particularly in efficiency and conversion.
Among new entrants, Genesis – the premium brand of Hyundai – emerges as a notable contender in the premium segment. Its particularly strong conversion score, reflecting an above-average progression from website visits to configuration starts, signals promising competitiveness in a challenging landscape.

Source: Berylls by AlixPartners


**Within the German OEM group, Opel and Smart rank at the lower end of the benchmark.** Smart, in particular, underperforms with notably low website traffic and sales volumes compared to its peers.

**In the European segment, Dacia secures third place, distinguished by strong conversion effectiveness – especially in progressing users from website visits to configurations.** Conversely, Peugeot and Polestar are among the weakest performers in this group, facing challenges across multiple stages of the funnel.

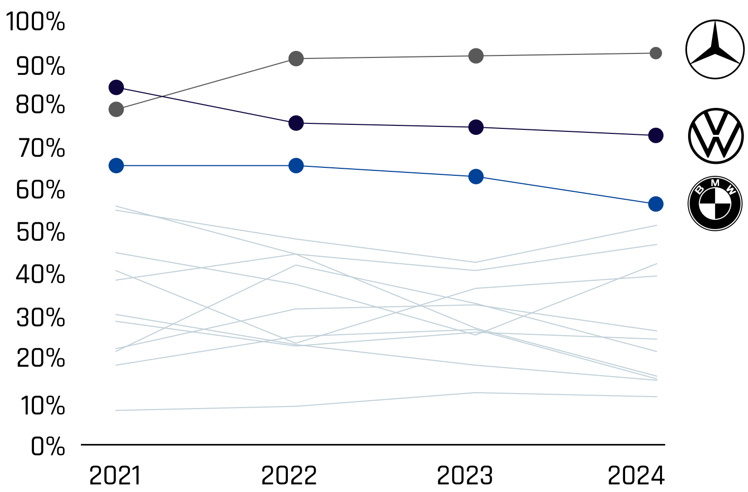
**Among non-European brands, Hyundai leads the segment**, demonstrating strong performance in both demand generation and conversion. Elevated website traffic – likely boosted by recent product launches such as the Inster – and impactful marketing initiatives, including the brand's Super Bowl campaign in early 2024, have contributed to this success.

Source: Berylls by AlixPartners

# THE SUBSCORES: CLEARLY DIFFERENTIATED CATEGORY CHAMPIONS

## PERFORMANCE

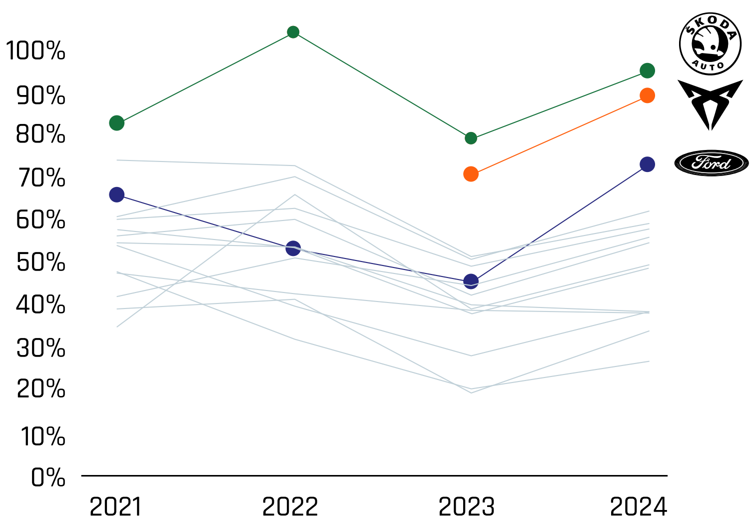
(selected brands across all categories; range: 0-100%)




**Mercedes, Volkswagen, and BMW have consistently led in absolute end-to-end funnel performance since 2021.** Most other brands analyzed remain in the lower half of the ranking, indicating a significant performance gap. The volume segment, in particular, has seen high volatility over time, driven in part by the dynamic performance of new entrants. For example, Hyundai doubled its relative performance between 2023 and 2024, while KIA's performance has declined by 50% since 2022.

## CONVERSION

(selected brands; range: 0-100%)

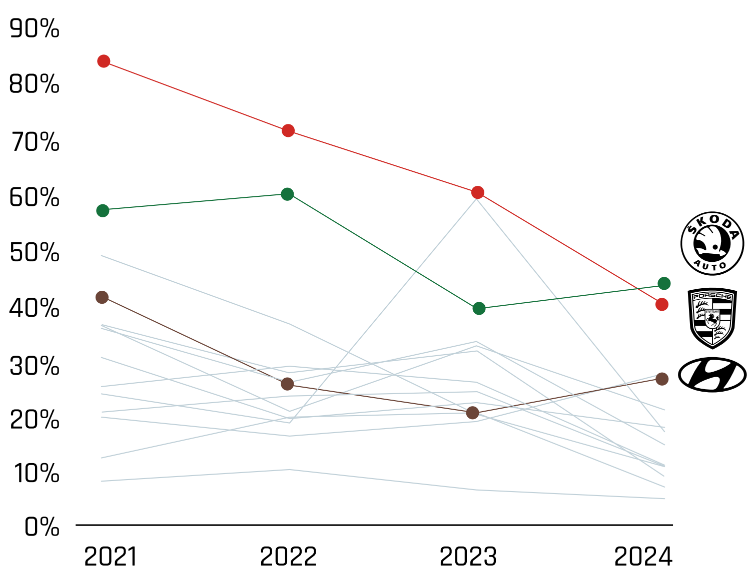



**Škoda and Cupra have consistently held the top two positions in funnel effectiveness rankings.** Ford has demonstrated significant improvement, rising from 13th to 3rd place. The majority of brands analyzed cluster in the mid-range of the effectiveness scale, reflecting a competitive but undifferentiated field. However, the steady decline in performance by Toyota and Porsche since 2021 is notable and raises strategic concerns.

Source: Berylls by AlixPartners

## EFFICIENCY

(selected brands; range: 0-100%)




Source: Berylls by AlixPartners

Škoda manages to take the poleposition in efficiency with the most effective marketing investments. Hyundai recovered their efficiency almost back to 2022 levels and clearly differentiates itself against most other volume competitors. Overall funnel efficiency remains low across the board, highlighting substantial improvement potential – especially in the face of already reduced marketing budgets.

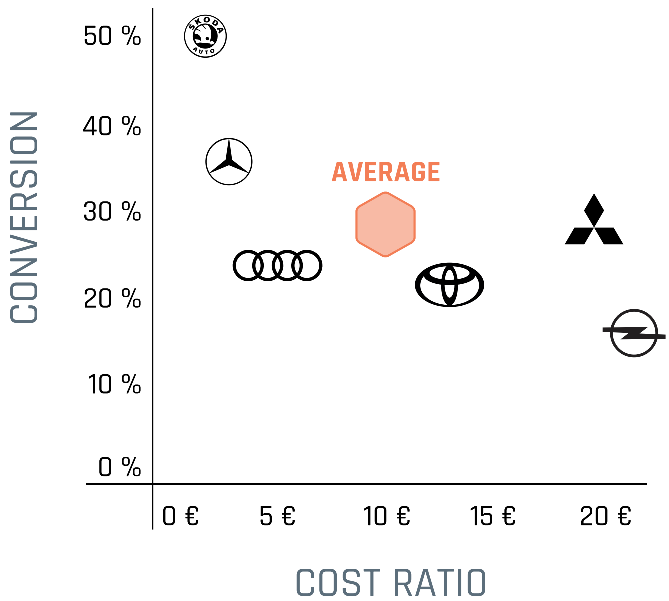
# DEEP-DIVES: CONVERSION AND EFFICIENCY FOR SELECTED BRANDS

> With a Cost per Started Configuration of Škoda, Opel could save approx. 20M€ annual media expenses in Germany.

**This deep dive explores how effectively and efficiently selected OEMs convert along the sales funnel.** Škoda leads the field in 2024 with a conversion rate exceeding 50%, achieving the most cost-efficient generation of started configurations at under €4 per conversion. In stark contrast, competitor Opel records a conversion rate of less than one-third of Škoda's, while incurring more than five times the cost per conversion. If Opel matched Škoda's efficiency, it could save approximately €20 million annually in Germany alone while achieving the same volume of started configurations.

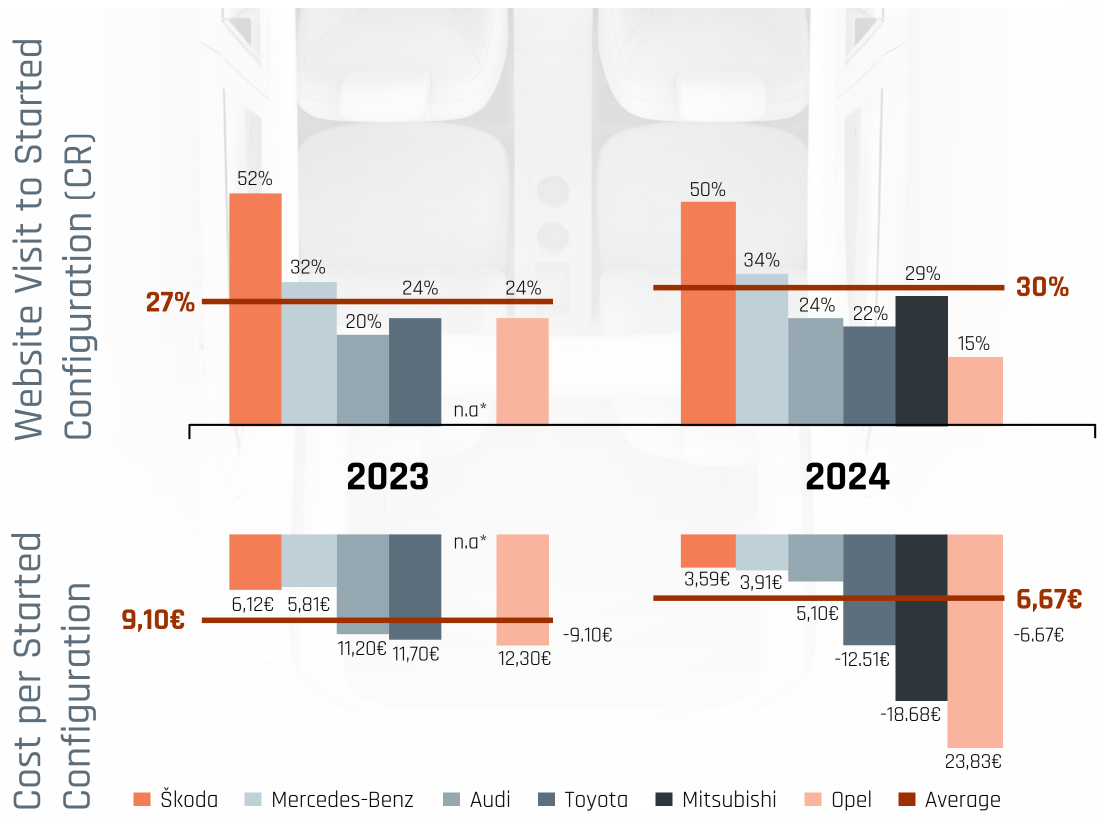
### MATRIX ANALYSIS: STARTED CONFIGURATIONS

(2024)




Source: Berylls by AlixPartners; *no 2023 data available

## CONVERSION AND EFFICIENCY OF STARTED CONFIGURATIONS




**A similar disparity is evident in the premium segment.** In 2024, Audi incurs 30% higher costs per started configuration compared to Mercedes-Benz, despite trailing by 10 percentage points in conversion rate – highlighting a notable efficiency gap between the two premium players.

Source: Berylls by AlixPartners; *no 2023 data available

# OUR APPROACH

### BERYLLS BY ALIXPARTNERS ESTABLISHES DATA-DRIVEN SALES & MARKETING FUNNEL MANAGEMENT FOR TOP- & BOTTOM-LINE IMPACT

## YOUR CHALLENGES

**Detached Sales and Marketing planning** leads to ambiguity of required actuals to reach Sales targets

**No clear allocation of KPI achievement** to individual models' Sales performance and activity contribution

**Lack of transparency of funnel health;** delayed – or best guess – budget and vehicle volume allocation

## OUR SOLUTION


## IMPACT

**Higher lead volume and conversion rates** through optimized funnel management and better alignment between marketing and sales

**Improved marketing efficiency** by focusing budgets on required demand generation

**Lower cost per lead driven** by better channel leverage, lead quality, and streamlined processes

# PROJECT EXAMPLE

## INTELLIGENT FUNNEL MANAGEMENT: TASKFORCE MODE TO SUPPORT SALES TARGET ACHIEVEMENT FOR A SUV MODEL

### INITIAL SITUATION

Sales performance significantly behind target. The Conversion rates of model in focus were not on predecessor level, despite high Marketing invest.

### OUR APPROACH

1. Identify root causes for performance gap/potential with **funnel benchmark analysis**
2. Identify and prepare **quick wins** to optimize funnel performance
3. Derive performance targets and budget plan with **reverse funnel planning** and develop a **steering concept** for demand-oriented performance management

### IMPACT

- **Increase in Leads** by 37%
- **Increase in Lead Conversion** by 4%pt
- **Reduction in Cost per Lead** by 28%
- **~12mn EUR budget saved** for medium sized OEM per major European markets

Source: Berylls by AlixPartners

# GET TO KNOW US.

**Berylls by AlixPartners** – The expertise of our top management consultants extends across the complete value chain of automobility – from long-term strategic planning to operational performance improvements. Based on our automobility thought leadership Berylls by AlixPartners stand out with their broad experience, their profound industry knowledge, their innovative problem-solving competence and, last but not least, their entrepreneurial thinking.

## YOUR CONTACT PERSONS

**Jonas Wagner**
Partner & Managing Director
jonas.wagner@berylls.com

**Nikolas Schoenenwald**
Associate Partner
nikolas.schoenenwald@berylls.com


Maximilianstraße 34 | 80539 München | +49 89 710 410 40-0
**info@berylls.com | www.berylls.com**

Munich, May 2025