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Changes in the Customer Buying Process of Premium Automotive Products Between the Generations X and Z

How to Target Generations Z as Customers for the Automotive Industry

A Master's Thesis submitted for the degree of
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supervised by

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Affidavit

I, **MARTINA BELLANOVA**, hereby declare

1. that I am the sole author of the present Master's Thesis, "CHANGES IN THE CUSTOMER BUYING PROCESS OF PREMIUM AUTOMOTIVE PRODUCTS BETWEEN THE GENERATIONS X AND Z", 89 pages, bound, and that I have not used any source or tool other than those referenced or any other illicit aid or tool, and
2. that I have not prior to this date submitted this Master's Thesis as an examination paper in any form in Austria or abroad.

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Abstract

Gen Z is born digital native and used to an ubiquitous omnipresence of the internet and other media. Born into an extremely high level of economic prosperity, they find a better situation in the job market than previous generations. The most important influencing factors for Digital Natives are the internet and other media, as well as multi-ethnical and multicultural experiences in society beginning at an early age. Gen Z has a positive attitude towards globalization and a strong ability of realistic assessment of chances and risks of global connections.

Gen Z differs from previous generations through intense use of the internet, and a high media consumption in general with a special focus on mobile devices, first and foremost smart phones.

The customer buying process of Gen Z in comparison to previous generations is characterized by intense use of the internet, especially in the information phase and evaluation of alternatives. The internet is also used parallel to traditional channels, e.g. during an interviews with a sales person or while watching advertising on TV. The customer buying process has shortened considerably and traditional sales channels are losing importance.

For those Digital Natives living in urban areas, the car is less attractive than other means of transport because of the high cost of ownership, and the difficult parking situation in the cities. For Gen Z, the car is no longer a status symbol, but has instead been replaced by smart phones.

The questionnaire study confirms previous findings regarding the use of media and modal mix. Peer groups like friends and family are of high importance for Gen Z, as well as user reports for products. In contrast to previous studies, the random sample shows reluctance regarding the purchase of high-priced products, i.e. also cars.

In the future, sustainability will become a major decisive factor for car purchase. Moreover, the seamless integration of the digital environment of the customer is a must. Innovation like self-driving cars will transform the car to a space of experience and retreat. The automotive business model must be transformed on the basis of ICT strategies. New ways of customer engagement and brand positioning will comprise optimal channel integration, an enhancement of the OEM brand image as a service provider, and the focus on offering an entertaining unique shopping experience.

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Content

1. Introduction

The generation Z, i.e. individuals born roughly from 1995 onwards, represents billions of dollars of current and future market potential, in other words: spending power. Yet it seems that the lifestyle of the so-called Digital Natives (Gen Z) is different from those of former generations. While it was customary for the generations X and Y to get their driver's license as early as possible, this is no longer true for generation Z. Moreover, Gen Z is the biggest demographic customer segment for car sharing. Trends like sustainability, eco-friendliness, and budget-consciousness are expected to influence the customer of the future. Apart from that, the most striking difference between the generations surely is the use of media, especially the role of social media. Although social media is already part of the marketing mix today, automotive industry still acts conservatively when it comes to new means of customer engagement. Tools like crowdsourcing, social media monitoring or social commerce are under-represented in automotive compared to other industries. The question now is not if Gen Z's new attitudes and circumstances will affect the customer buying process in the future. It is rather how they will affect it.

The goal of this thesis is to predict these changes in the customer buying process in automotive premium products for the generation Z in comparison to generation X, i.e. individuals born between 1960 and 1980. Generation X is chosen as a reference group because they currently represent the biggest group of new car buyers.

Previous research offers a reasonable amount of data and insights regarding the customer buying process of generation X and their attitudes and habits in regard to the automotive industry. On the contrary, there exists only a limited amount of data concerning Gen Z regarding their future customer behavior in the automotive sector. The present thesis raises data in a survey in which a group of Gen Z members are interviewed about their modal mix as well as customer buying process with special focus on the use of social media. The goal of the study is to gain insights on the modal mix of generation Z regarding their individual mobility today and expectations for the future. In doing so, the importance of the car for Gen Z, whether as an own car or used via car sharing options, can be evaluated. To identify the current status of the customer buying process the five phases as described by Kotler are investigated, i.e.: need recognition, information search, evaluation of alternatives, purchase decision, post-purchase behavior.

The survey focuses on the geographical region of Munich in Germany. Munich is the third largest city of Germany and the 12th biggest city of the European Union. It has a population of approximately 1.5 million people. Moreover, the Munich Metropolitan region comprises 5.8 million inhabitants in total. Munich was chosen as the focus of the study because of two reasons:

Firstly, in comparison to the bigger cities Berlin and Hamburg - as well as to the German average – Munich has the highest population of working age, i.e. people between 15 and 64 years old. A population of working age is generally split in two groups: a) 15 years until under 40 years (younger workforce) and b) 40 until 64 years (elder workforce). Munich has the highest amount of younger workforce, i.e. 52.5% of the population. That means the youngest employees now starting their working life and thus represent a certain share of market potential already belong to generation Z.

Secondly, due to the size of Munich city and the Munich Metropolitan Region in general there is a high diversity in the modal mix. It comprises public transport incorporating underground railway, suburban trains, trams and buses, as well as individual transportation like cars, car sharing, bicycles etc. There is no necessity to use transportation by the own car but instead people can chose one means of transport over another given the advantages and disadvantages of the different concepts.

Besides the questionnaire study, a group of experts from the automotive industry is interviewed about their expectations regarding generation Z as customers and the role of social media in future customer engagement.

The first chapter gives an overview on the main influences affecting the different generations, about their core values, their attitude towards education, and their general relation to money and consumerism. The second chapter analyzes commonalities and differences between the generations X and Z regarding the main features in customer behavior as far as explored today. Chapter three presents the setup of the expert interviews and the questionnaire study. In chapter four, the results from the expert interview and the questionnaire study will be compared. The information as retrieved from the questionnaire study with generation Z will be compared to the status quo of the customer buying process. In chapter five, the findings from the previous chapters are linked to the efforts made by premium automotive OEMs today. The chapter gives some recommendations for action regarding the traditional sales structures aiming at optimally targeting generation Z members as customers of the future for the automotive industry.

2 Generations X, Y, Z – Commonalities and differences

Numerous publications, whether scientific or popular scientific, use the term "generation" or create catchy short-lived words like "Baby-Boomers" or "Generation Golf"[1] to address a certain group of individuals.[2] Although the term generation is widely used in different contexts, its definition varies depending on the context being political, social, economic etc. What is a generation? In principle, a generation consists of individuals born during a specific period of time. As a consequence, certain historical events are experienced at a similar age.[3] Formative events during an early age can subsequently lead to similar attitudes and thinking, resulting in comparable behavioral patterns within the group of individuals of one generation.

Definitions of time frames belonging to the different generations can be found throughout literature. A universal and exact definition of who belongs to which generation doesn't exist. Instead, the time frames vary from source to source.

The generation born after the Western Post–World War II baby boom was named "Generation X". The term has been in use since the 1950s and reached widespread popularity when the sociologists Hamblett and Deverson published their findings on British youth culture in a book carrying the name "Generation X" in 1964.[4] In the current thesis, the author follows the attribution of cohorts to the generations according to the findings of the Nielsen Norman Group, which covers roughly 20-year age spans between generations.[5] Generation X (Gen X) refers to adults born between 1960 and 1980. Following the nomenclature, the demographic cohort born between the early 1980s and 2000s carries the name generation Y (Gen Y) – the so-called millennials.[6] It is characteristic for Gen Y that their individuals were children and teenagers during the mid and late nineties when their use of media was strongly influenced by the rapid increase in personal Internet usage. This is why Gen Y is the first generation to sometimes be included in the definition of the so-called "Digital Natives", i.e. individuals who grew up using digital devices such as computers, videos, video games, social media etc. As an antonym to the digital natives, the term "Digital Immigrants" refers to individuals who had to learn the usage of media during adulthood.[7][8]

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1 (Illies, 2000).
2 (Maase, 2003).
3 (Matthes, 1985).
4 (Hamblett & Deverson, 1964).
5 (Meyer, 2016).
6 (Hurrelmann & Albrecht, 2014).
7 (Riederle, 2013).

When strictly following the pattern of consecutive timeframes, Generation Z (*Gen Z*) are born from the year 2000 onwards, they are "born digital". For Gen Z, the internet is a fundamental inherent part of their lives that they depend on.[9] Although stereotyping whole generations is of course difficult and can be a misleading element in the answering of research questions, the frequency and duration of the use of media clearly differs significantly between the three generations[10] As shown by statistical analysis of cohort data.[11]

The goal of raising such statistical data serves not only the explanation of the past, but is also the attempt to extrapolate certain findings to predict future events or changes in behavioral patterns. These changes in behavioral patterns can affect consumerism and lead to market discontinuities. An early identification of these market discontinuities through statistical data can support companies and public sector institutions in the adaption and thus efficient exploitation of the market changes. Two main characteristics should be analyzed when trying to predict future developments: Firstly, the identification of stable elements across the generations that can lead to commonalities between them. Secondly, the interpretation of incisive changes across generations that lead to differences in attitudes and behavior between the generations. These commonalities and differences are described in the next paragraphs, focusing on influencing factors, resulting core values and work ethics of the three generations described above.

2.1 *Influencing Factors*

Economy and Globalization

For reasons of clarity or simplification, generations are often displayed as differentiated groups occurring in consecutive order. It is, however, important to bear in mind that generations are in no way homogenous groups, but comprised of many different subgroups of individuals. These subgroups have different backgrounds and beliefs and are affected by external factors to a different extent, e.g. when it comes to economic factors like income and expenditures.[12]

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8 (Prensky, October 2001).
9 (iab- internet advertising bureau UK, 2007).
10 (Best & Engel, 2016).
11 (Best & Engel, 2011).
12 (Paulin & Riordon, 1998).

Moreover, it is important to not only adopt or transfer findings from one country to another because it bares the risk of disregarding specific developments, which are characteristic for the country of Germany. For example, the “Baby Boom” which gave its name to Gen X, set in ten years later in Germany, in comparison to the US due to the long rebuilding phase after World War II.[13] Moreover, the division of the country and later reunification in 1989 lead to different attitudes in East and West Germany. These discrepancies are still measurable today in young adults between 15 and 25 years of age who were not even born at the time of the reunification.[14]

After WWII different occupation zones emerged from Germany. The Western part of Germany, under occupation of France, Great Britain and the USA, was transformed to a social market economy based on the principles of democracy and rule of law. The Eastern part of Germany was reestablished as a socialist state following the principles of planned economy under supervision of the Soviet Union. While the West focused on reconstruction and development, which resulted in the German “Wirtschaftswunder”, East Germany suffered from high reparations that hindered the process.[15] During the 1950ies, full employment and wage increases lead to material prosperity and a development of the social security systems in West Germany. This lead to a stabilization of the social and economic situation and finally promoted the “Baby Boom” in Germany. The foundation of the European Coal and Steel Community 1951 laid the foundation to European Union. Democratization and West (or East) integration led to internationalization, a trend that influenced not only the Baby Boomers, but also the socialization phase and working life of Gen X.

Born from 1960 onwards, the early Gen X members were born into a climate of high-spending and consumerism. During the second half of the 1960ies, this economic growth decreased and resulted in sudden drops in the employment market and inflationary trends. During the 1980ies, the early employment-phase of the Gen X in Germany, the situation was characterized by a government that tried to reduce public debt. This resulted in a flexibilization of the employment market and a decline in social security benefits. Subsequently, the economy was revived and when Gen X entered into their working life, they found themselves in a far better starting position than former generations.

The economic dimension of globalization characterizes the ongoing interdependence of world economy. From a historical point of view, it is controversial

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13 (Rump & Eilers, 2013).
14 (Shell Jugendstudie, 2015).
15 (Oertel, 2014).

if there is a defined starting point for globalization. Globalization is a phenomenon occurring in waves of increased interdependencies between countries. These interdependencies can be traced back until the 15^{th} century. However, since the 1980, politics had to constantly counter steer negative effects of globalization like the exploitation of third world countries in favor of big corporations.

Germany's foreign trade market grew constantly from 1990 until 2011, increasing not only exports, but imports, too. This buyers' market lead to a constantly growing amount of options in the consumer goods industry and unprecedented level of consumer sovereignty, which is a strong influencing factor for the core values in Gen Y. Moreover, Gen Y experiences an increased level of mobility towards foreign countries based on international commercial relationships and vacation trips. Student exchange programs and university semesters abroad become more and more common. Gen Y is the first generation to get into contact with foreign cultures at an early age. Cultural barriers are still existent but decrease over time, especially within Europe.

Historic events affecting Gen Y are the fall of the Berlin Wall and subsequent reunification of Germany, the end of the Cold War, the tragic terror attacks on the World Trade Center on September 11 and the resulting wars in Iraq and Afghanistan. Moreover the financial crisis in 2007 and its continuing aftermath had huge impact on the socialization of this generation and lead to an intense experience of insecurity.[16] Also the introduction of the single currency Euro can be regarded as a formative event, since it brought advantages as well as disadvantages, now apparent in the Euro crisis.

Gen Z in Germany is used to an extremely high level of economic prosperity. They have a positive attitude towards globalization and a strong ability of realistic assessment of chances and risks of global connections. For Gen Z, having close friends with a migration background as well as close friends in foreign countries is unexceptional.[17] This circumstance is strongly reinforced due to the use of media in today's knowledge society.

Social Changes and the Promotion of the Knowledge Society

The starting point when taking about social changes are the 1960ies. While the building of the Wall in 1961 led to a change in Eastern politics and a stepwise

[16] (Dahlmanns, 2014).
[17] (Uphues, 2010).

acceptance of the separation of Germany, a modernization of state and society took place in West Germany. The generation conflict became more and more obvious and traditional loyalties and authorities were challenged. Student protests claimed for new political social orders. Experimentality, belief in progress, and willingness to embrace change became new core values. The number of marriages declined constantly since 1950 and average age when marrying has increased.[18] Medical progress - including oral contraceptives – supported the liberalization of sexuality and family planning. More and more Women enter the workforce and gain own income. Their spending power and market potential increased tremendously.

During the 1980ies, society's increasing individualization replaced the more collectivist thinking of Gen X. New possible behaviors and modes of action to shape one's conduct of life are opened up. Gender equality and the empowerment of women lead to changes in the gender roles. Divorces and alternative family forms, like single-parent families or same-sex couples, became acceptable. Gen Y was the first generation to grow up using the internet and personal computers on a wide scale. As a consequence, media became an important instance of socialization an addition to parents and peer groups.[19]

The transition from the industrial to the knowledge-based society promotes networking, establishing of competencies in the field of media and digitalization, and requires media literacy to an unprecedented degree. Gen Z is born digital native and used to an ubiquitous omnipresence of the internet and other media. Even at an age as young as 4-5 years, children report regular use of computers.[20]

Another important influence factor for Gen Z is their multi-ethnical and multicultural experiences in society. While in the 1950 only about half a million foreigners lived in Germany, today every fifth inhabitant comes from migration background.[21] At the same time, crises as well as acts of terrorism lead to a ubiquitous uncertainty. It has yet to be proven in how far these events had an impact on Gen Z.

2.2 Core Values and Work Ethic

Core values and work ethics of the different generations are not in the focus from a sociological point of view in the present context, but merely because they affect spending power and customer behavior.

[18] (Nave-Herz, 2002).
[19] (Rump & Eilers, 2013).
[20] (SWR Medienforschung, 2015).
[21] (Klaffke, 2014).

The process of socialization in individuals defines a formative phase in life in which experiences are interpreted with regard to spaces of action and subsequently transformed in to values. Central moral concepts are usually fixed in adults. They change hardly over time and are essential for all generations. In Germany, such values comprise e.g. human dignity, physical integrity, and equality before the law. Apart from these universal values, more subordinated values as well as their priority differ between the generations.[22]
Baby Boomers profited from the Wirtschaftswunder and unemployment rates below 1%, i.e. full employment.[23] They were performance-oriented and view work as a duty that is to fulfil to provide for the family.[24] When Gen X entered their work life during the mid and late 1970ies, the situation was difficult because of the starting recession in 1973 and the resulting increase of youth unemployment. However, while in 1975 11.5% of the under 20 years of age were unemployed, it decreased to 9.3% in 1979.[25] Once entered their working life, the Gen X found good working conditions. While the postwar period was characterized by product scarcity, economy transformed from a sellers' market to a buyers' market in the 1970ies. This resulted in highly divers production programs and need for qualified personnel. With Gen X a paradigm shift from "live to work" to "work to live" took place. Self-determination as well as life enjoyment become important values. Besides the performance-orientation of the Baby Boomers, Gen X demands personal satisfaction from their work. Gen X favors teamwork, participation, and diversity. These values are reflected in changes in organizational and personnel development, e.g. the extension of flat hierarchies and cooperative management styles.[26]

During the 1980ies, a base unemployment of above 2 million people accumulated in Germany. About 20% of young people born from 1985 onwards have no access to university studies or apprenticeship. Internships, fixed-term contracts, and temporary employment are measures to cope with these difficulties in the job market. Gen Y experience massive economic, social, cultural, and ecological changes during their youth and have to adapt to these changes constantly and efficiently. On the one hand, this constant adaption of one's life's plan to

[22] (Oertel, 2014).
[23] (Parment, 2009).
[24] (Hinrichs & Giebel-Felten, 2002).
[25] (Harten, 1980).
[26] (Oertel, 2014).

circumstances leads to strong competencies regarding problem solving. On the other hand, Gen Y suffers from what sociology calls “inconsistency of status”:

Gen Y acts precociously when it comes to media, consumerism and leisure activities. On the other hand, they are “late bloomers” in entering the work place and starting a family – both important developmental task on the way from youth to adulthood. Longer periods of education and difficulties finding a permanent job lead to blurred lines in this entering of adulthood. Gen Y cannot longer realize the traditional life script of their parents. The blueprint of consecutive life phases of childhood, youth, working life, family life, retirement does not apply anymore. In contrast to the former generations of sceptics or ’68, Gen Ys do not take a strong opposition regarding their parents or reject former values. Gen Y accepts the current political, economic and cultural living conditions as they are and show a positive attitude. Their relationship with the parents is better than in all the former generations. Gen Y perceives their parents as “allies” to deal with the insecure future and see no need to rebel against them. However, Gen Y grew up in a situation of oversupply and suffered from constantly having to choose between endless possibilities, from the choice of websites to brands of electronic devices via the choice for the right field of study. Since it is impossible to take into account all facts and figures, e.g. when it comes to buying the best product, Gen Y is much more used to make gut decisions in comparison to Gen X. Moreover, Gen Y is a generation of realists, businesslike in their perception of the environment. Confronted with a huge amount of insecurities during their youth, they try to leave all the doors open and are known as the generation of ego-tacticians.[27] This applies also to the working environment. Gen Y tend to be less loyal to employers then Gen X. Work-life-Balance is a core value to become more and more important for Gen Y and their strong tendencies towards individualistic behavior is a challenge for companies.[28] Career opportunities, financial incentives, flexible working hours, and additional services are among the most important factors for Gen Y when choosing an employer. [29] Although Gen Y strives for self-fulfillment and growth, studies show that “security of the workplace” is one of the most important criteria in the choice of the future employer.[30] To stay with one employer the whole life is an outdated model and self-fulfillment and development opportunities are the most important non-

[27] (Hurrelmann & Albrecht, 2014).
[28] (Rump & Eilers, 2013).
[29] (Dahlmanns, 2014).
[30] (Rump & Eilers, 2013).

monetary factors to engage Gen Y and can constitute a serious competitive advantage in the “War for Talents”.

Gen Z has hardly arrived in the working environment. While younger members are children and attend school, the eldest Gen Zs are in the phase of apprenticeship or career choice. From today’s perspective Gen Z finds a better situation in the job market. Studies show a self-confident generation that is interested in politics and feels less pressure to perform.[31] Their future prospects seem to be more stable and structured in comparison to Gen Y. For Gen Z it is not uncommon any more to see women in leadership positions.[32] Some expect Gen Z to tend towards self-determination as well as life enjoyment, similar to Gen X with an increased commitment to public interests.[33] However, statements regarding this generation are yet to be verified. It is expected that the mega trends of globalization, flexibilization and digitalization will continue and dissolve organizational structures more and more. Demand for navigation in the world of (social) media will increase - a competence that Gen Z will certainly be able to fulfil.[34]

2.3 Summary

Gen X is the generation born roughly between 1960 and 1980. This generation is influenced by a climate of high spending and consumerism, building of the German Wall and a subsequent modernization of state and society in West Germany. They found good working conditions and introduced a paradigm shift from “live to work” to “work to live”. Gen X demands personal satisfaction from their work, favors teamwork, participation, flat hierarchies and cooperative management styles. Core values like experimentality, belief in progress, willingness to embrace change, and the challenging of traditional loyalties and authorities characterize Gen X. Sexuality and family planning underwent great changes due to the medical progress, i.e. oral contraceptives. More women enter the workforce, gain own income, and increase their spending power and market potential tremendously. Although the number of marriages declined constantly since 1950 and average age when marrying has increased, Gen X follows a traditional life’s plan. It consists of consecutive life phases of childhood, youth, working life, family life, and retirement. The internet as a

[31] (World Vision Deutschland e.V. , 2013).
[32] (Parment, 2013).
[33] (Hurrelmann & Albrecht, 2014).
[34] (Eberhardt, 2015).

factor that influenced the following generation played no role in the socialization of Gen X. They are considered Digital Immigrants, who were exposed to the internet only as adults.

Gen Ys, the so-called Millenials, are born between 1980 and 2000. They are influenced by the reunification of Germany, the end of the Cold War, tragic terror attacks, and wars, e.g. in Iraq and Afghanistan. The intense experience of insecurity during the socialization phase of this generation were intensified by the financial crisis in 2007 and its continuing aftermath. Gen Y grew up in a situation of oversupply and suffered from constantly having to choose between too many different options. These circumstances, together with longer periods of education and difficulties finding a permanent job, raised Millenials to be known as the generation of ego-tacticians, also to the working environment. Gen Y tend to be less loyal to employers then Gen X, work-life-balance is a core value and they have a strong tendency towards individualistic behavior. Gen Ys have a better relationship with their parents in comparison to former generations. They accept the current political, economic and cultural living conditions as they are and show a positive attitude. Gen Y was the first generation to grow up using the internet and personal computers on a wide scale. Thus, they are the first generation for which media became an important instance of socialization an addition to parents and peer groups

Gen Z, the Digital Natives, are born from 2000 onwards. The Digital Natives are born into an extremely high level of economic prosperity. They find a better situation in the job market than Gen Y. The most important influencing factors for this generation are the internet and other media, as well as multi-ethnical and multicultural experiences in society beginning at an early age. Gen Z has a positive attitude towards globalization and a strong ability of realistic assessment of chances and risks of global connections. Having close friends with a migration background as well as close friends in foreign countries – whether via media or in “real life” - is common for Gen Z. Digital natives have an unprecedented level of digital literacy. They will certainly be able to fulfil the demand regarding digital and media topics in the workplace, where the demand for navigation in the world of (social) media will increase. Gen Z is expected to be a self-confident generation that is interested in politics and feels less pressure to perform. It has yet to show in how far the current circumstances like migration, ongoing Euro crises and acts of terrorism will have an impact on the socialization of Gen Z.

3. Generation Z as a customer

The emphasis of the following chapter will lie on the generations X and the Digital Natives, since it is the goal of the thesis to predict changes in the customer buying process in automotive premium products for the generation Z in comparison to generation X. Gen X makes the biggest group of new car buyers in Germany.[35] Gen Z is the upcoming generation that has yet to be won as customers for the automotive industry. As discussed above the role of media will play an outstanding role in both, product design and commercialization. The difference in the use of media between the generations will be illuminated in the following.

3.1 Differences in the use of media between the generations

When talking about the differences in the use of media by different generations, it is difficult to distinguish between those effects that can be named “generation effects” and those, which are “age effects”. On average, elder individuals are less open-minded towards new technologies and innovations then younger individuals. Thus it appears that e.g. differences in the use of social media are more connected to the age of the user at the time the new medium was invented than in a difference of values or attitudes.[36] However, a detailed analysis of the reasons for differences of usage of the media would go beyond the scope of this thesis. Therefore, not only the actual usage, but also the importance of the medium has to be taken into account.

A long-term study of mass communication of public-service broadcasting in Germany analyzed four “classical” media: TV, radio, printed newspaper, and internet (with no regard to the means of access to the internet).[37] The study used cohort analysis, i.e. ten-year time spans, and tried to answer the question: Is the usage behavior of media tied to the socialization of people born during the same decade and thus different between the cohorts, or is age as such a defining factor for the use of media? The study is based on analysis of data that has been raised from 1970 until 2015.

One central finding of the study is that the overall time of usage spent on media across the different age groups does not increase any more, i.e. a saturation effect

35 (statista, 2016).
36 (Jäckel, 2010).
37 (Best & Engel, 2016).

occurred. In 1970, the average usage time of media was 217 minutes per day. In the following decades, the usage time increased threefold until 2005 (599 minutes/day), and has stagnated since 2010 (583 minutes/day). In 2015, a slight decrease in average usage time of media was stated, i.e. 566 minutes per day. It has to be considered, however, that the object of investigation has changed over time. While in 1970 only TV, newspaper and radio were investigated, more media were added, e.g. video, mp3, internet etc. The use of printed newspaper has steadily decreased, followed by radio and a slight decrease of TV usage, but due to the strong increase in internet usage, the average usage time of media remains stable. The increase of usage time of media- whether technical or content related – becomes obvious throughout the generations. Cohorts born from 1980 onwards increased media consumption above all by using the internet.

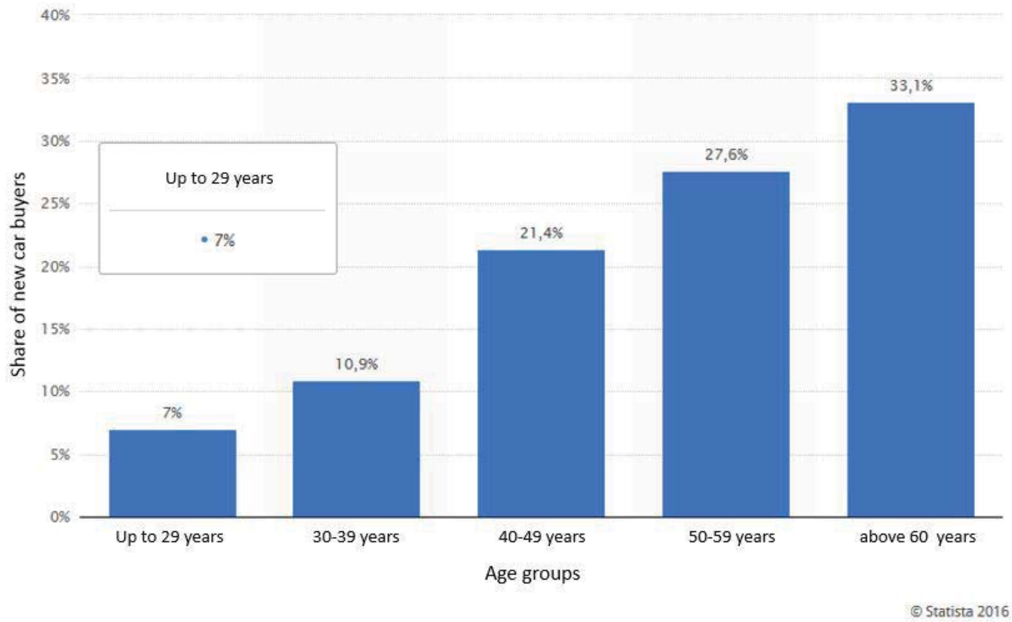

Figure 1: Percentage of new car buyers in 2016 according to age.
Gen X is aged 37-56 y/o in 2016.

When investigating the media portfolio of the different generations, another difference between them becomes obvious. The media portfolios for people born before 1980 remain stable despite the invention of the internet. In those cohorts, TV and radio are the most important media. Printed newspaper is of secondary relevance, also for older generations that do read more printed papers in general. When looking at Gen Y, or rather individuals born from 1980 onwards, a real break in the composition of media portfolios occurred. The fundamental change in the portfolio is based on the heavy use of the internet. Gen Y and Gen Z spent 40% of their media usage time on it, while for Gen X and former generations it's only 25% at most. Moreover, the internet is the most relevant medium for Gen Y and Gen Z and the usage time for the internet is added at expense of the TV consumption.

Throughout the whole population, the usage of the internet increased from 13 minutes daily in 2000 up to 107 minutes daily in 2015. It is however important to note, that only 15% of the internet usage is "medial", i.e. consist of videos, audio content or news. The other 75% of internet usage time in Germany comprises communication - like email or instant messaging-, searching (Google etc), commercial transactions - like online shopping and banking- , and games.

As stated above, those individuals born in the late 1980, i.e. Gen Y, show the highest increase and highest level of internet usage. The expansion curve flattens in individuals born after 1990, meaning that the youngest cohort, i.e. Gen Z does not reach a higher usage time for the internet than Gen Y. Digital Natives (Gen Y and Z) spent about three hours daily on the internet, Gen X and former generations do not exceed an average usage time of the internet of two hours daily.

Ownership of electronic devices and usage

Gen Z, i.e. children and teenagers between 6 and 19 years in Germany have many possibilities assessing electronic devices. The households they are living in are almost always fully equipped with TVs, PCs, Laptops, mp3 players, video consoles, CD/DVD players, and digital cameras. 98% of teenagers (12-19 y/o) own a smartphone or normal mobile phone, in children between 6 and 13 it is still 47%.[38]

95% of teenagers own a smartphone (only 3% a "normal" mobile phone) and 75% of them have flat rate access to the internet via their smartphone. In children, 25% own a smartphone already. Furthermore, 75% of teenagers in Germany own a PC or laptop, 29% a tablet PC. Owner ship of PC/laptop drops to 21% in children between 6 and 13; only 2% of them own a tablet PC. In this youngest cohort of Gen Z, 18% have access to the internet from their children's' room.[39] Moreover, 57% of teenager (and 35% of children) have a TV of their own, 54% a radio, 59% a mp3 player.

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[38] (Feierabend, Plankenhorn, & Rathgeb, 2015).
[39] (SWR Medienforschung, 2015 - KIM-Studie 2014).

It is also remarkable that media as such is of an outstanding importance, that studies regarding overall media - and specifically the internet - are not only conducted in adults and teenagers, but also in children as young as 2 years. Although they do not possess own devices, they do use media. The usage time of TV in children between 2 and 6 is almost an hour per day. Besides TV and books, which are the major media for the small children of this age group, 7% of them have gained first experience with the internet and 5% use it regularly. The average age of children in Germany when using the internet for the first time is 3.8 years.[40]
Almost all teenagers (97%) report usage of the internet, 80% daily use. Mobile access is dominating with 88% of teenagers reporting access by smartphone within the last 14 days before inquiry for the JIM study. Only 75% accessed the internet via PC or laptop, 20% used a tablet.[41] In this interaction of the 12-19 y/o, 40% of usage time is allotted to communication, 25% to entertainment, 20% gaming and 14% searching for information. For communication, teenagers use mostly WhatsApp (85%), Facebook (38%) and Instagram (30%). For video content and music videos, 94% of the teenagers use YouTube, 81% use it several times a week.

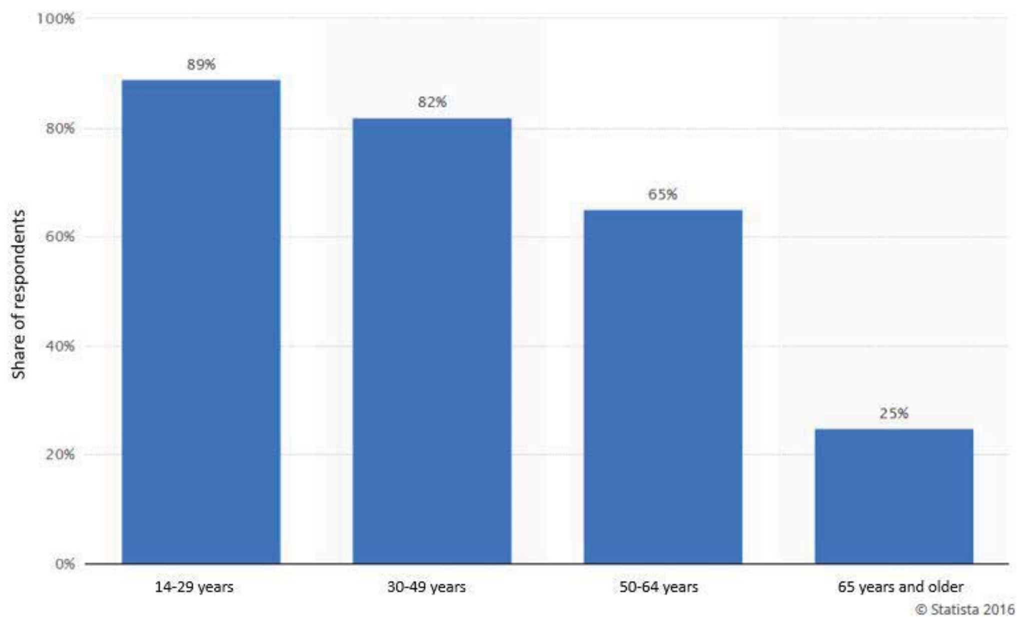

Figure 2: Share of smartphone users according to age in Germany 2016.

40 (SWR Medienforschung, 2015 - miniKIM 2014).
41 (Feierabend, Plankenhorn, & Rathgeb, 2015).

We have similar findings for children between 6 and 13. Here, 98% have the possibility of accessing the internet at home, and 63% of them do so on a regular basis. Stationary PCs and laptops are the first means of access in children, followed by smartphones. Children use the internet mostly for searching information (71%) at least once a week, and social networking (53%).

The above displayed findings are also confirmed by an online study Yahoo conducted in Germany investigating the use of media, brands, and ownership of mobile terminals of 1663 people.[42] Participants were clustered age wise in two groups: 12-19 y/o and above 20 y/o.

The smartphone is ranked as the most important device, 89% of the 12-19 year olds own one – as compared to 75% in the age group above 20 years. Figure 2 gives an overview on the share of smartphone users according to age in Germany in 2016. While the average "Onliner" spends 3.2 hours per day at a stationary device (such as a PC), and uses mobile devices only 1.2 hours, this relation is actually shifted at the age group of the teenagers. Here, only 2.7 hours are spent at a laptop or PC while the mobile phone is in use for 2.3 hours per day. Considering this, it becomes clear, that those contents, which cannot be accessed online, fail.

The study also supports the afore mentioned differences for the daily TV consumption throughout the generations: 1.7 hours for the age group 12-19 and 2.7 hours for participants above 20 years of age. Moreover, the trend goes towards using less devices (3.73 in Gen Z as compared to 4.37 with the average Onliner above 20) that comprise more features.

The actual use of the smartphone in the youngest generation is also different from the average user. Gen Z uses smartphones primarily as a means of entertainment. In Gen Z, 60% feel more entertained by their smartphone than by the TV. This number drops to 21% in people above 20 y/o. Especially the daily consumption of online videos supports this finding, as it is 66% in teenagers and only 25% in average onliners.

It can be stated that Gen Z uses social media much more extensively than the average, especially networks like Snapchat, Instagram or Tumblr. Besides the topic of self-fulfilment (58%), teenagers are interested in what is going on in the lives of others (29%), discover new trends (29%, Onliner: 16%), and follow brands (20%, Onliner: 11%).

[42] (yahoo, 2015).

Summary

A remarkable but not surprising finding is that the later someone is born, the higher the usage of the internet. While usage time of media increased steadily for all generations, the portfolio of the media is different between them.

For Gen X, TV and radio are the most important daily media, followed by the internet. For Gen Y an Gen Z – the Digital immigrants – the most important medium is indeed the internet, followed by TV and radio. Printed newspaper is only of secondary importance for all generations. Gen Y and Gen Z spend about three hours daily on the internet, while Gen X does not exceed two hours.

Gen X and older Gen Ys use stationary devices like PC or laptop in 2/3 of the internet usage time and mobile devices like phones and tablets during the other 1/3 of usage. In Gen Z and the younger Gen Ys, the relation is reversed; they use mobile devices in 2/3 of the internet usage time, and stationary devices during 1/3.

Over all three generations, 75% of internet usage time comprises communication, searching, commercial transactions, and games. The other 25% are used for medial content like online videos, audio content, and news.

Gen Z main reasons for using the internet are self-fulfillment, connecting to others, communication, entertainment, and following trends and brands.

3.2 Differences in the mobility behavior

Besides their different usage of media, the generations show different modal mixes, depending on their age. The inspection of the mobility behavior is important for this thesis, since it sheds light on the importance and use of the car for the different age groups and therefore gives indication on how to win new customers. The most comprehensive evaluation including age as a factor is certainly a German wide study conducted by the German Federal Ministry of Transport.[43]

The base-year survey collects information on transport in Germany on a regular basis since 1970. In 2008, 25.922 households, 60.713 individuals respectively, were interviewed. Over all interviewees, 90% leave their homes on an average day and travel 3.4 routes on average. Most important reasons for traveling are organization of leisure time and shopping. Getting to work and business trips decrease steadily in

[43] (infas, 2010).

importance. The reason for this is demographic change and increasing number of single households.

Ownership of driver's license

An important event regarding the topic of mobility is the obtaining of a driver's license. In 2008, 88% of individuals of age possess a driver's license. While the overall percentage of driver's licenses increased since 2002 due to the "catch-up" of women (increase in licenses: 7%, male: 1%), there is a slight decrease in individuals between 18 and 29 y/o. Here, the decrease is almost solely explicable in the decrease of driver's licenses in the group of male individuals On the contrary, in there is an increase in licenses above the age of 40. The ownership of a driver's license is furthermore dependent on household income. Among lower-income households, 80% of individuals own a license, in households with very low income the number drops to 73%. Individuals coming from households with a very high income own a driver's license in 97%.

Another important factor regarding the ownership of driver's license is the place of residence. 83% of individuals living in the urban core own a license, in rural areas it's 90%. Here, mobility without a car is difficult.

Mobility as a factor of age

When analyzing correlations between age and mobility, three main phases can be identified: Childhood until legal age, middle aged (18-60 y/o), above 60 y/o, which corresponds predominantly with retirement age. Children display the lowest mobility in routes as well as in travel duration. However, travel duration increases already during youth. Children until the age of 10 travel only about an hour per day, 24 kilometers respectively. Teenagers between 14 and 17 travel 80minutes/day, i.e. 30 kilometers, on average. When reaching majority and owning a driver's license daily travel routes increase to 49 kilometers, travel time to 86 minutes per day. This high amount of travel duration remains in the further age groups. Highest mobility rates occur in the age group of 30-49 y/o, i.e. in Gen Y and X. Between 50 and 59, a slight decrease in mobility can be observed, followed by a continuous flattening of mobility with beginning of retirement age. However, only in individuals above 74 y/o, travel duration and routes decrease again significantly until 16 kilometers per day.

Modal mix according to age

Figure 3 gives an overview on the modal mix in relation to age. The modal mix shows that walking and biking have their highest share in volume in children. Especially 11-13 y/o use bikes as a means of transport. These ratios decline with increasing age in favor for public transport. The highest percentage in public transport can be found in 11-17 y/o. Nevertheless, competition from motorized private transport can already be detected teenagers. In 14-17 y/o, 5% of all routes are covered by it, i.e. mopeds. As soon as maturity as reached, the share of motorized private transport jumps to nearly 50% of all routes.

The whole age span from 18 until 59 is characterized by a huge amount of motorized private transport, especially cars. The highest share of car use is in the 40-49 y/o; they use the car for 2/3 of their routes and mainly drive for themselves. Going on foot and biking is lowest in this age group, with only 20%, and 10% respectively. With retirement age, the importance of the car declines steadily. The modal split is mainly shifted towards going on foot. At large, the car remains the most frequently used means of transport for most people.

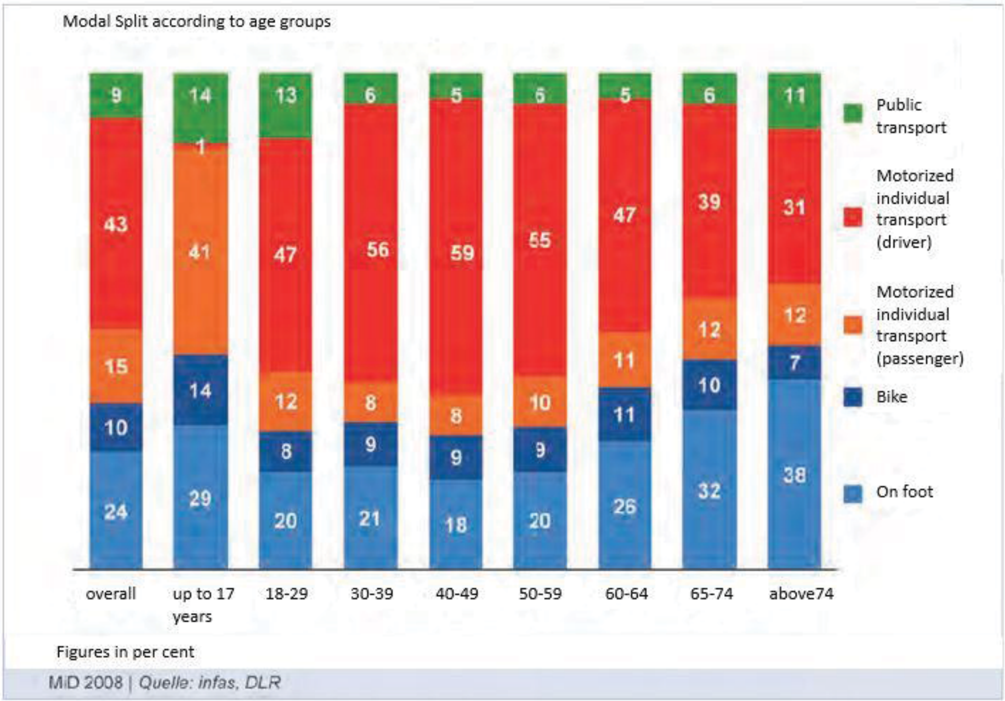

Figure 3: Modal mix in relation to age.

Reasons for travelling

Not only the modal mix, but also the reasons for travelling differentiate according to age; figure 4 gives an overview. The two main reasons for travelling in teenagers are education (33% of routes) and organization of leisure time (approx. 45% of routes). For very young children up to the age of 10, 25% of routes are so-called “accompany-routes”, in which they accompany their parents, e.g. when they go shopping. This occurs mainly because parents do not want to or have no possibility of leaving their children at home. During the middle aged (18-60 y/o) phase, reasons for travelling are characterized by trips to work and less organization of leisure time. In the group of 30-49 y/o, accompanying routes increase again, mainly for parents that accompany their children for example. In individuals above 60, organization of leisure time increases again, followed by shopping. With increasing age, a concentration on daily provision occurs. People above 74y/o travel only 2.3 routes per day and more than two thirds of these routes are concerned with shopping or personal business.

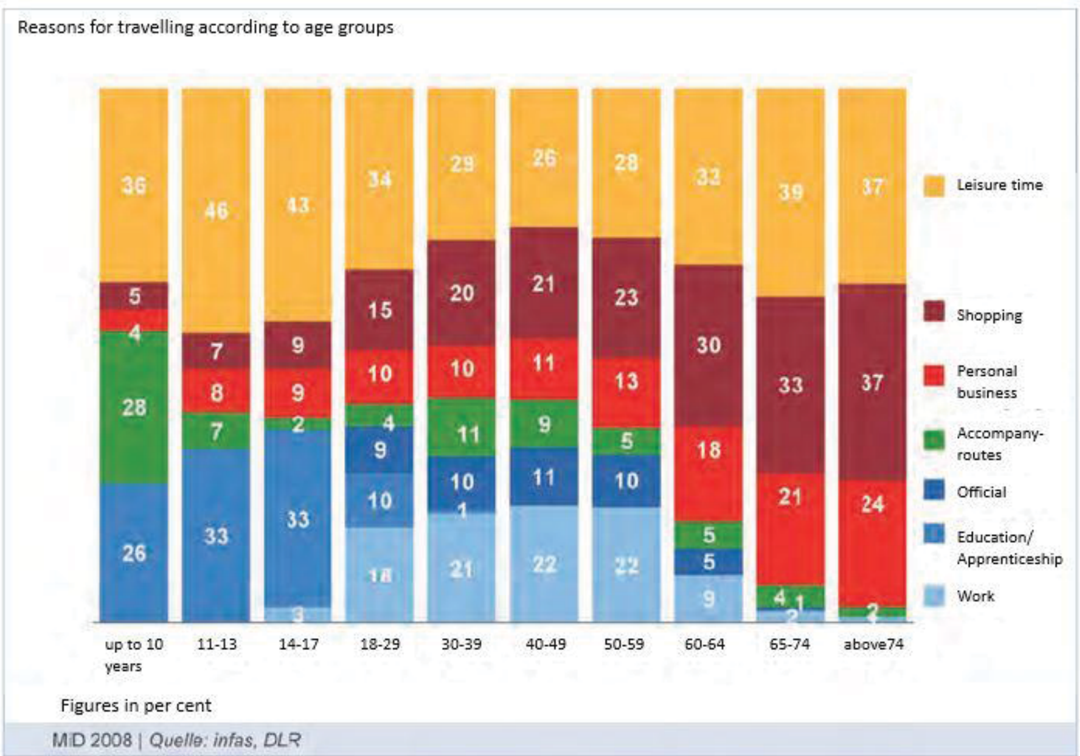

Figure 4: Reasons for travelling according to age.

Automotive trends in the young generation

Apart from the above-described differences in mobility between the generations, a closer look reveals further trends regarding mobility in the young generation. The modal split reports, that while between 2002 and 2008 the daily travelling distances increased, the daily usage time of the car decreased in individuals between 18 and 29 y/o. Figure 5 gives an overview on the changes in mobility behavior in urban areas between 2002 and 2008. What is even more interesting is, that although mobility in general is increasing, the share of motorized private transport decreased by 8% in the group of 18-29 y/o and by 6% in participants between 25 and 44 years (Figure 7). [44]

Although there is only a slight decrease in the ownership of driver's licenses in young people, the daily usage time of the car in German urban areas in the age group of 18-24 y/o declined by 12% between 2002 and 2008. At the same time, the use of public transport increased by 5%.[45]

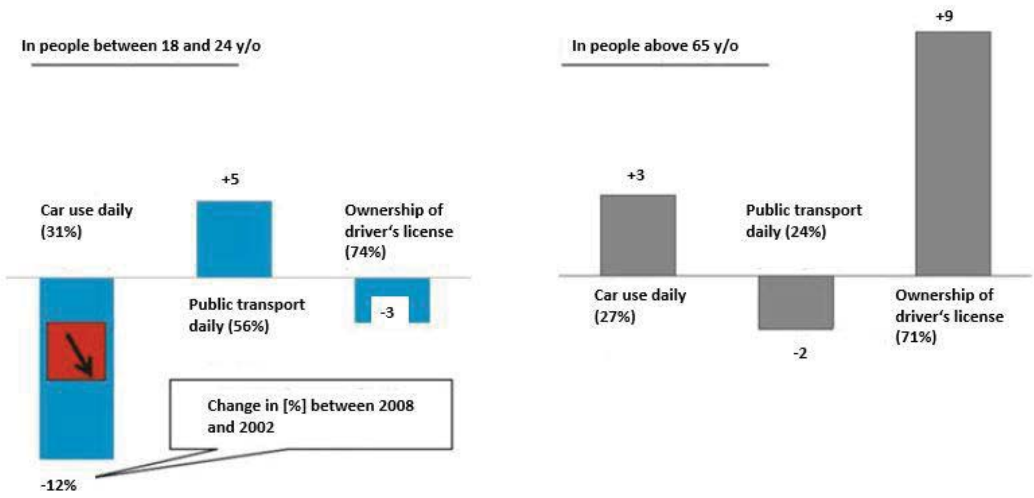

Figure 5: Changes in mobility behavior in urban areas (above 100.000 inhabitants) between 2002 and 2008. Values in brackets denominate actual numbers of 2008. Source: Ebel & Hofer, 2014.

Apart from these findings, it is important to note that the number of households that do not own a car is relatively high in the major cities. While the nationwide

[44] (Bratzel, 2014).
[45] (Ebel & Hofer, 2014).

percentage of households without a private car is 18%, this number increases to 29 % in Munich, 33% in Hamburg, and already 41% in Berlin.[46]

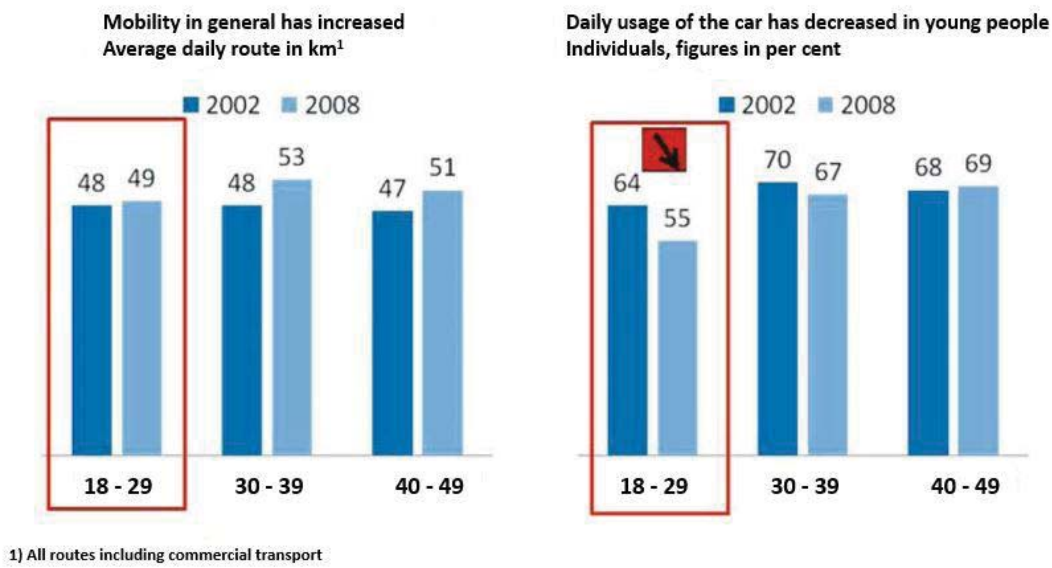

Figure 6: Daily travelling distances in comparison to usage time of the car in the age group 18-29 y/o. Source: Bratzel, 2014.

The motivation for these changes in the mobility behavior in young people is divers. On the one hand, the cost for purchase and maintaining of a car has increased considerably over time. Indeed, it increased disproportionately in comparison to overall increase of cost of living. Between 1995 and 2010, the increase in cost of living was 24.6%, but the maintenance cost for a car increased by 41.6%.[47] This trend continued also during the following years; in 2011 alone, the cost for maintenance of a car increased by 4.9% while cost of living increased by 2.6%. These over proportional cost increase in the recent years was caused by a tremendous rise in oil and gas prices (13.9% between October 2010 and October 2011).[48] The later decrease in oil and gas prices between June 2015 and March 2016 by 9.4% resulted also in decreased cost for holding a car, but only by 2.1%. Nevertheless, cost of purchase and maintenance remains high.[49] Since the young generation is often relying on only low income, cost will remain an important influencing factor for them.

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[46] (Infas/Öko-Institut, 2009).
[47] (ADAC, 2010).
[48] (ADAC, 2011).
[49] (ADAC, 2016).

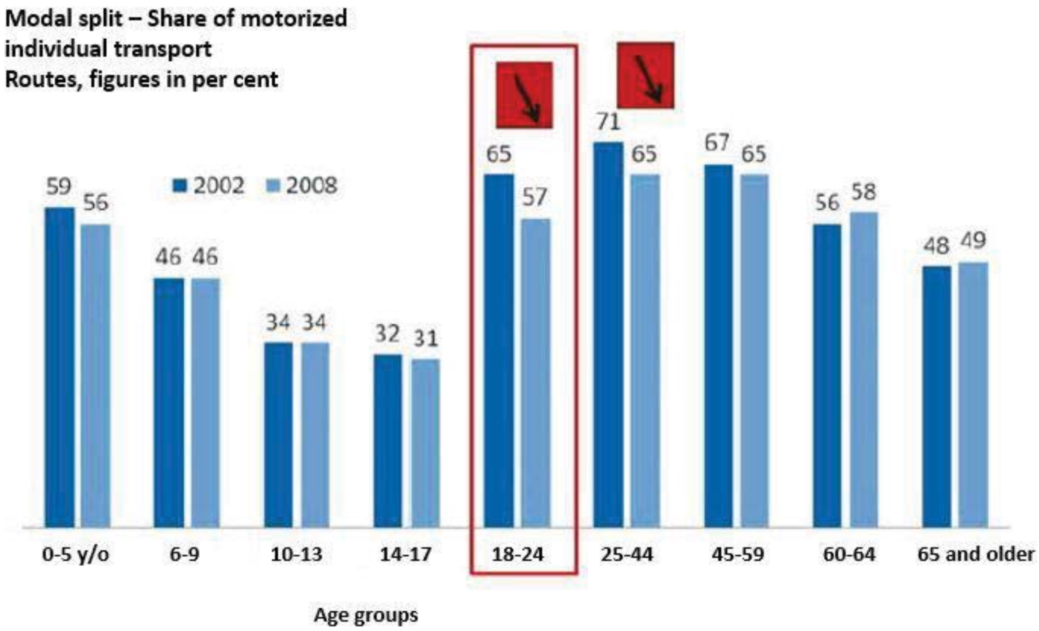

Figure 7: Share of motorized private transport in the modal split.

Two more important influencing factors regarding car ownership are search for a parking spot and traffic jam; both problems are more pressing in urban areas. 56% of German drivers are discontent with the situation of traffic jams and 30% report to be annoyed by the search for parking lots.[50] Moreover, parking within urban areas is often subject to a fee, which is then another cost factor. Both factors diminish the attractiveness of car ownership. Here, too, it is not to be expected that the situation will improve in the near future.

Especially in urban areas, people can chose for mobility alternatives, which are perceived equivalent to a car. Important factors regarding these alternatives are cost, comfort, and travel time. One of these alternatives is public transport. As mentioned above, the use of public transport has increased by 5% in young people between 18-24 y/o. The younger cohorts rank availability of their work place or shopping destinations by public transport much better (36% “very good/good”) than overall age average (29% “very good/good”). Another study reports, that 75% of young adults between 18 and 24 y/o report at least “good accessibility” of their hometown via public transport. Interestingly, those individuals who do not use a car regularly give significantly higher marks on this question: 91% state “good

[50] (Ebel & Hofer, 2014).

accessibility" of their hometown, 71% in regular users of cars do so. These ratings give insight to the fact that public transport is a serious alternative to the car for the majority of young people.

Another alternative that becomes more and more important, is car sharing. Nearly 2/3 of individuals between 18 and 25 y/o report to be familiar with car sharing. 46% of them can imagine using car sharing at least sometimes without to renounce their own vehicle. After all, 7% can imagine renouncing their own car if suitable car sharing offers are available. [51]

Different studies between 2008 and 2011 tried to investigate the attitude of the young generation towards the car. The majority of young people has a positive attitude towards automobiles, but the picture is somehow split. In 2011, about 75% of the 1200 interviewees report that for them, owning a car is "very important" or "important". 23% of the participants, however, state that owning a car is "less important" or "not important" to them. Of these 23%, women are a majority. Moreover, low income households (below 1200€ net/month), unemployed and especially students play an important part.[52]

Furthermore, 72% of the participants have a positive attitude towards cars in general; 26% report that cars "inspire" them, 46% report that they "like driving cars very much". The other 28% of interviewees have a more rational and very pragmatic attitude towards cars: For them, a car is not a status symbol any more, but only a means of transport, a functional object to get them from A to B. This group of "car rationalists" seems to be growing over time. In 2010, the predecessor study reported only 22% of participants belonged to this group. During this investigation, 22% of young adults could imagine "a life without a car".[53]

A classic indicator towards the importance of the car for the 18-25 y/o is the question of renouncement. Since the purchase of a car is one of the most expensive investments in a private household, the question is, if participants would rather renounce holidays, leisure activities, an own apartment or bigger apartment, retirement provisions, or savings in favor of purchasing a car. 30% of participants are not willing to renounce any of the above-mentioned options in favor of a car. For them, a car has no emotional value and is, as mentioned above, not a status symbol. Another 46%, however are willing to renounce expensive holidays or leisure

[51] (Bratzel, Lehmann, & Tellermann, 2011).
[52] Ebd.
[53] (Bratzel & Lehmann, 2010).

activities in favor of a new car. In women, this percentage is even higher (50%). Only 18% of the young adults are willing to sacrifice their savings, only 4% are willing to renounce a bigger apartment.

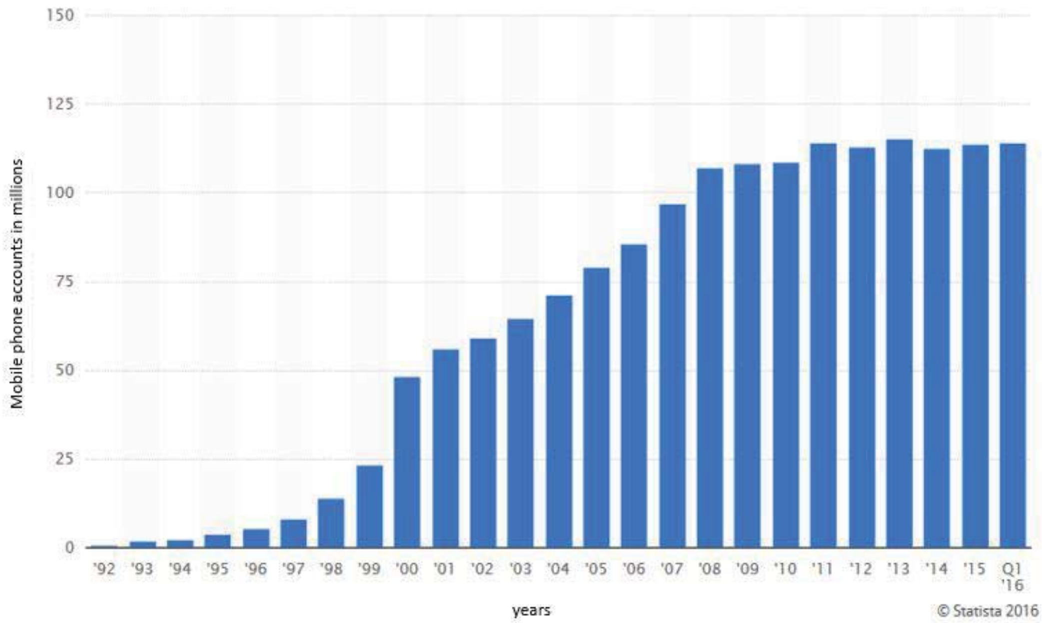

Figure 8: Development of mobile phone contracts in Germany since 1992. The graph includes prepaid as well as long-term contracts.

Furthermore, the vehicle is no longer a status symbol for the young generation, but is replaced more and more by e.g. mobile phones/smart phones. As described above, more than 90% use the internet and phones have become indispensable for many. They are of outstanding importance especially for Gen Z. In 2016, 114 million mobile phone contracts were actively used in Germany; this equals almost 1.4 contracts per person (Figure 8). For young people, temporary renunciation of a car is far more imaginable than turning away from their smart phones. In the group of 18-25 y/o, only 24 % can imagine a life without smartphone and internet for one month. On the contrary, 60% can imagine going without a car for one month. [54] Other studies confirm this finding of decreasing automobile affinity.[55, 56, 57]

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[54] (Ebel & Hofer, 2014).
[55] (Kruse, 2009).
[56] (Kruse, 2011).
[57] (Kuhnimhof, Buehler, & Dargay, 2011).

The dominant role as a status symbol and a means of social distinction has been undermined and the vehicle as such is very likely to lose even more in importance for the young generation.[58] This raises the question whether it is at all possible for OEMs to compete from this level of perspective.

Summary

During the last years, is a slight decrease in the ownership of driver's licenses was registered in individuals between 18 and 29 y/o. The ownership of driver's license is dependent on household income and place of residence. People living in the urban core are less likely to own a license in comparison to inhabitants of the rural areas where mobility without a car is difficult.
Mobility is clearly a factor of age. Highest mobility rates occur in in Gen Y and X. With increasing age, mobility decreases. In the modal mix, the car remains the most important means of transport for most people, especially for individuals between 40 and 49 y/o. The main reason for travelling are education and trips to work, followed by organization of leisure time, shopping, and daily provision.

Increasing purchase and maintaining cost, traffic jams, and search for parking spots dampen the attractiveness of vehicle owning in urban areas. At the same time, public transport, cycling, and alternative mobility solutions like car sharing, are accepted by the young generation. In the world of Digital Natives, cars are no longer status symbols; instead, they have been replaced by smartphones. Since these trends are fueled by long-term changes in economy as well as society, they do not seem to reverse anytime soon. It appears that the decreasing automotive affinity among young people could be long lasting or even permanent.

[58] (Canzler & Knie, 2009).

3.3 Differences in the customer buying process

The classical customer buying process

The customer buying process is defined as the process that is conducted by a consumer before, during, and after the purchase. It is an initial assumption that the customer already has a certain level of commitment to buy. It is not always the case that a customer passes through all five stages of the process. For example, in habitual buying, i.e. everyday use products and commodities, a customer will skip certain phases of the process or reverse the order of the steps.[59]

Figure 9 describes the classical customer buying process as defined by Kotler. This representation will serve a basis for the analysis of the current situation of the customer buying process in automobiles as well as for deductions regarding the future.

Figure 9: Customer buying process as described by Kotler.
Source: https://nishthachawla.wordpress.com/

The customer buying process is split into five phases according to Kotler: Need recognition, information search, evaluation of alternatives, purchase decision, and post purchase behavior. During the customer buying process, it is the customer's goal to find the product which fits best his needs.

In the past, this traditional buying process was mostly satisfied by a retailer, i.e. the retailer was of highest relevance for the customer in the past. The whole value adding of the customer buying process took place at the retailer or dealer, including preselection, information, provisioning etc. Consequently, the revenues did not have to be shared. Figure 10 describes the traditional order of vendor selection, product selection, and purchase in the customer buying process. As a first step in the past,

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[59] (Boundless Marketing, 2016).

the customer decided to which dealer he wanted to go. After that, the whole process of product overview, product information, and product selection and subsequent product purchasing took place at this specific retailer. It is characteristic for the classical customer buying process that point of decision and point of sale coincide.[60]

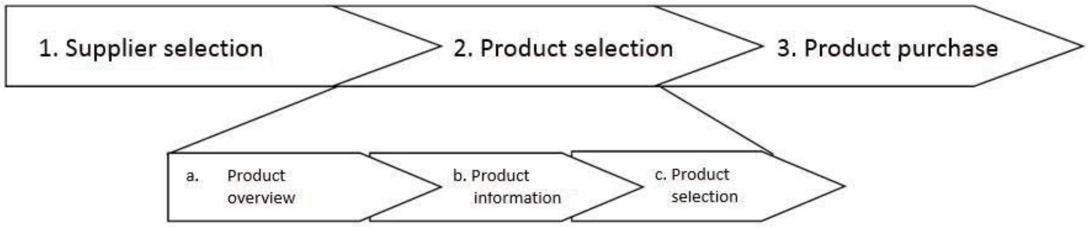

Figure 10: Traditional order of vendor selection, product selection, and purchase in the customer buying process. Source: Boersma 2010.

The internet: A game changer in the customer buying process

This past order of the customer buying process was radically changed by the invention and widespread use of the internet. Firstly, the competitive environment is different. The internet enables customers to gain easy access to whichever product from around the world. Secondly, the internet provides the potential customer with information and data on every product imaginable. This circumstances support the customer in the decision making process with detailed information, product comparison websites, test reports, and products reviews from previous customers.[61]

Moreover, the use of the internet affects also “emotional” buyer motives. Besides the pure technical information on the product, the costumer receives also information from his peer group regarding acceptance and popularity of a product. This information is for example shared via social media. Not only does this support the customer in his decision for a certain product, but it also signalizes a certain group membership. Thus, the purchase decision process is decoupled from previous steps. Analogue the value adding processes within the dealer network are decoupled as well. Revenues are shared between different value adding stages and do not necessarily merge at one dealer. This shift in the phases of the customer

[60] (Heinemann, 2013).
[61] (Boersma, 2010).

buying process is a threat to traditional retailers and dealers, because the point of decision for a purchase is no longer linked to a certain point of sale.

Figure 11 gives an overview on a possible new customer buying process with involvement of online tools. First of all, the customer uses search engines, online market places, social shopping services or social communities to get a product overview regarding interesting products.

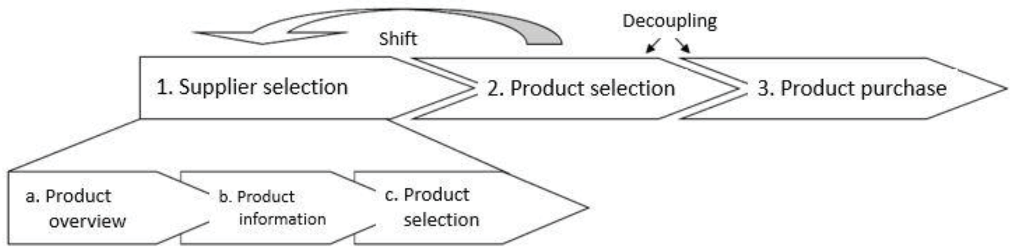

Figure 11: The "new" customer buying process as defined by Boersma.

This information is subsequently compared, e.g. with the help of manufacturer websites, test reports and the like. After that, the customer decides for a certain product that fulfils his needs.[62] It is only at the end of the process that the customer decides for a vendor that is optimal in his regard and purchases the product. This decision is most often related to the price of the product and relatively decoupled from online or offline channels. As a consequence, the retailer loses his significance in the process and is merely point of sale for the customer. On the contrary, the point of decision becomes more important. Since the internet provides for data in abundance, the retrieving of the right information is the most value adding step for the customer.[63]

In 2010, the increasing importance of the internet in all stages of the customer buying process in automobiles was already reported.[64] The purchase decision phase in general has shortened dramatically during the last years. While in 2010 it

[62] (Boersma, 2010).
[63] (Stracke, 2005).
[64] (Joos, 2010).

was approximately 12 weeks long[65], it decreased to eight weeks in 2014 and was reported shorter than six weeks by the end of 2015.[66]

Need recognition

Although the phase of need recognition is skipped in Boersma's definition of a new model, it is the beginning of every customer buying process. Need recognition refers to the moment, when a customer realizes that a need or problem exists that needs to be satisfied. Need Recognition is often triggered by an internal stimuli, such as hunger or thirst. For more complex products, this process of need recognition can be fueled by advertising.

Gen Y grew up with „emotional products and services“ and a constant overflow of options in the consumer goods industry. This buyer's market lead to a unprecedented level of consumer sovereignty. In contrast to Gen X, Gen Y takes it for granted that marketing addresses emotions.[67]

What draws Gen Z towards a certain brand? While 73% of online users above 20 y/o want to be informed, 64% of Gen Z appreciates mostly creativity and 67% entertaining videos. This is especially pronounced in teenagers between 12 and 15 y/o. Gen Z has a strong desire for genuine content and are above all open for proactive offers. Since they use especially their mobile devices to overcome boredom, i.e. without predefined purpose, brands with humorous contents can score in this field of advertising by creating unique content.

Not only the customer requirements as such have changed, but also the perception of advertising. TV advertising is still the medium to reach the most people, but the actual effect on customers fades, i.e. 61% in Gen Z and 70% over all age groups can remember the TV advertising on average. As investigated above, the Digital Natives are especially prone to using mobile devices, first and foremost mobile phones and smart phones. Interestingly, mobile advertising is perceived twice as often by Gen Z as compared to the average Onliner.[68]

Not only advertising, but also other measures instill a sense of need in the customer and increase sales. In 2011, the share of new cars had increased to 30% as

[65] (diffferent Strategieargentur, 2010).
[66] (Google Neuwagenkäufer Studie, 2015).
[67] (Parment, 2009).
[68] (yahoo, 2015).

opposed to 17% in 2008. The main reason for this is the German scrapping incentive from 2009 that encouraged young adults to buy new cars. While the average age of their cars was between 8 and 9 years, cars from 2009 (12%) and 2008 (9%) are now leading the list of registration dates.[69]

Information search

The second step of the customer buying process is the information search. Once the customer is driven by his need, he will search for more information related to the fulfilment of this need. If the need is pressing and a suitable product is near at hand, the consumer is likely to buy it without collecting a lot of information. This phase can also be skipped altogether, i.e. in habitual buying. If the drive to fulfil the need is not strong, the consumer will likely begin an information search. The more research he does, the more he will become aware of the different competing brands and available products.

Even when a product is not finally purchased online, the internet is the most reliable medium regarding information search for products. In Germany, 97% of households that have internet access research online before they purchase a product. 50% of these households run comparison of prices, search for information on retailer websites, read test reports and take into account other user contributions. These user ratings have gained high importance during the last years and are of significant relevance to the preparation of major purchase decisions.[70]

Due to this fact, computers and mobile devices have become an inherent part of the customer buying process. A study with 2000 participants from the different generations in Germany found, that already 20% of interviewees use their smartphone or tablet for online purchasing of products or services at least once a week. More than 40% of consumers use smartphones and tablets for online research once a week and another almost 40% use it several times per week for this purpose.[71] Within their homes, computers or laptops are still the most often used devices and account for 85% of the online purchased products. Only 10% of online purchasing at home is done via tablet and another 6% by smartphone. The differences among the generations are palpable also here. While 11% of Baby Boomers use their tablet for online purchases at home, it is only 6% in Gen Z. The

[69] (Bratzel & Lehmann, 2010).
[70] (Heinemann, 2013).
[71] (ECC online experts, 2016).

Digital Natives on the other hand use their smartphones in 10% of purchases while the number drops to only 15% in Baby Boomers. Due to their bigger screen and thus easier usability, the tablets are clearly preferred by the older users.

Top-3 uses for different devices	Babyboomer Year of birth 1950-1965	Generation X Year of birth 1965-1980	Generation Y Year of birth 1980-1995	Generation Z Born after 1995
PC/Laptop	• Emails • Online shopping • Online information research	• Online shopping • Emails • Social networks	• Online shopping • Social media • Films, videos, series	• Watching or downloading films, videos, series • Online shopping • Social media
Smartphone	• Chatting • Taking photographs • Telephoning	• Chatting • Taking photographs • Social media	• Chatting • Social media • Taking photographs	• Chatting • Social media • Listening to music (streaming or downloading)
Tablet	• Social media • Emails • Reading messages	• Playing online games • Social media • Reading messages	• Watching or downloading films, videos, series • Online shopping • Social media	• Listening to music (streaming or downloading) • Online shopping • Social media

ECC Köln 2016

Figure 12: Top three uses of different devices according to age.

In Gen Z, 15% of users and 18% in Gen Y state that they would basically only use the smartphone instead of computer or laptop when purchasing goods online while they are at home. Figure 12 gives an overview on the top three uses of different devices in the generations. The picture of the general use cases is very similar across generations with only a few exceptions already displayed above. Shifts in frequencies and commonness of use do, however, occur between the different age groups. The category “Smart TV” is not an option. Although 40% of smartphone users own also a smart TV, it has not yet established within the customer buying process. Almost 50% of users agree that online shopping is out of the question for them due to the bad usability of the smart TV for this purpose. A similar situation occurs for smart watches. Due to the very small display, usability for the purpose of online research and shopping is not feasible. Interestingly, when asked about the future probability of usage, it is Gen X (14%) and Gen Y (18%) that can imagine the use of a smart watch for online shopping in the future. While at least 8% of Baby Boomers report the same attitude, the smart watch is not at all present as a common device in Gen Z. It seems as if the youngest generation does not perceive any added value from wearing an "extra" watch in addition to their smart phone.

When it comes to online shopping in situations where the customer is away from home, the smartphone takes a primary role. Figure 13 displays the various situations in which smart phones are used for information purposes regarding online purchase. More than 40% of participants report doing online research "very often" or "often" while waiting, e.g. at the doctor's or at the station. Another 16% use it at the restaurant or café.

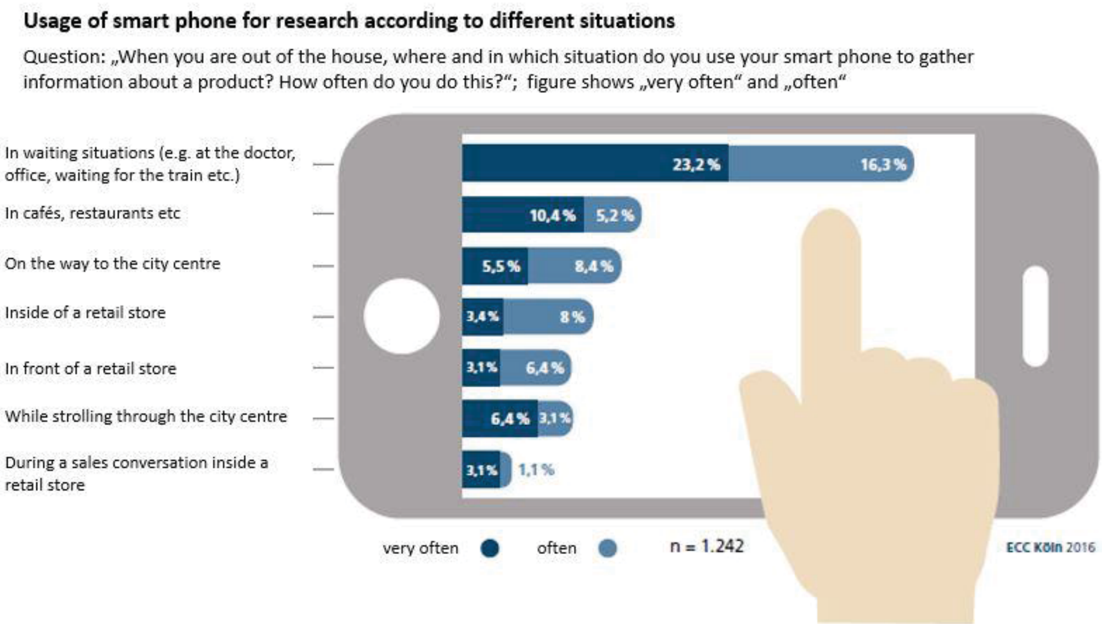

Figure 13: Use of smartphones for information search in different situations.
Source: (ECC online experts, 2016).

Only 4% of customers do online research "very often" or "often" during an actual sales conversation. Another 16% report doing this "rarely" and 64% of participants state that they never did this in the past. Here also, significant differences between the age groups can be found. Figure 14 gives an overview on the different situations in which online information search on a specific product is done via smart phone according to generations. In Gen Z, almost 17% use their smart phone for information search inside a shop, and more than 8% do so during a conversation with a sales person. This is almost twice as much as for example in the Baby Boomers and also far more than in Gen X and Gen Y.

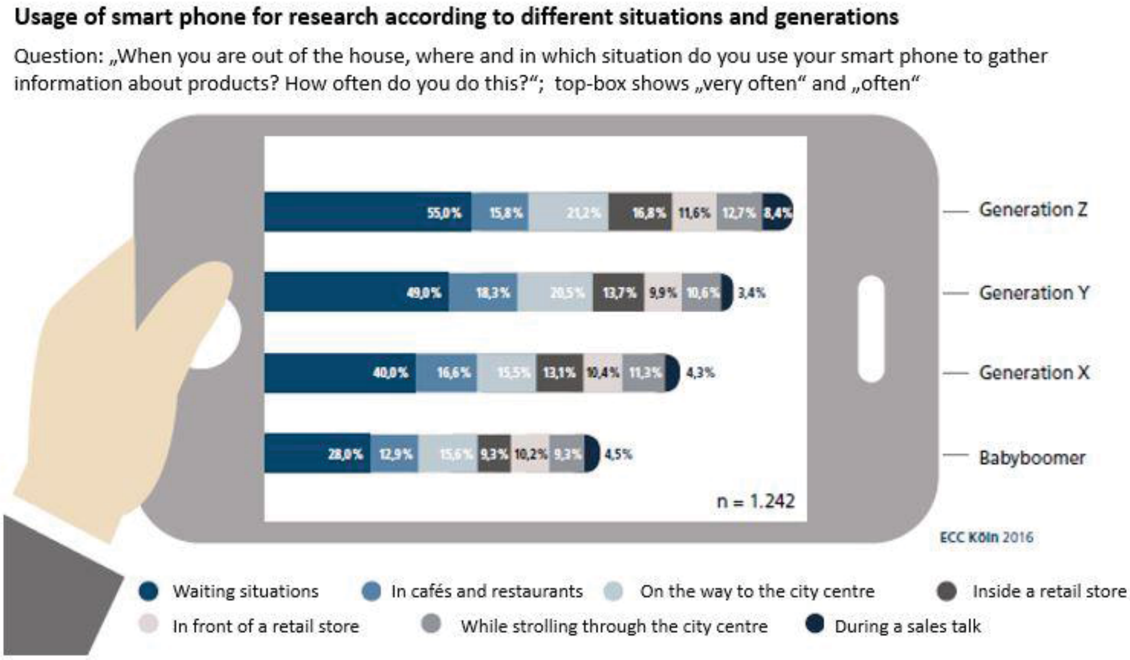

Figure 14: Use of the smart phone for online information search of products in different situations. Source: (ECC online experts, 2016).

It is expected that this behavior will increase in the future and that manufacturers and retailers will have to adapt their strategies to fully incorporate this kind of online information search in the customer buying process.

It is not yet clear how this goal can be reached. Also today, some retailers offer their customer that the sales person can get information from their personal customer account to increase service quality, but only 17% regard this as expedient. Another 56% decline this option altogether, most likely due to privacy reasons. This negative attitude is mostly present in elder customers, while in Gen Z the attitude is positive towards such measurements. Dependent on their target group, dealers have to choose wisely between different options. If the main target group is Gen Z or the Digital Natives in general, accurate measures should be implemented. If the main target group is more towards the age of the Baby Boomers it seems to be more suitable to leave online research to the customers and for example focus on the provision of W-LAN instead. Otherwise, retailers run the risk of inducing a negative attitude in the customer, e.g. due to fear of data misuse.

In the automotive industry, the internet has also replaced the dealership as the first point of contact during the phase of information search. Googles New Car Buyer study 2015 reports that 9 out of 10 interviewees in Germany inform themselves about brands and models via internet. More than 60% of participants were indecisive regarding both, brand and model, at the beginning of the information search. It is only during the process of information search that 10% of people decide for one specific brand. This is important, since it documents that during this phase, there is much room to increase brand awareness and wage a decision in favor of a certain OEM.[72]

Besides the model or brand of a new car, customers conduct also research regarding many other topics, e.g. equipment, price, financing etc. Figure 15 gives an overview over topics and used media devices during the research process.

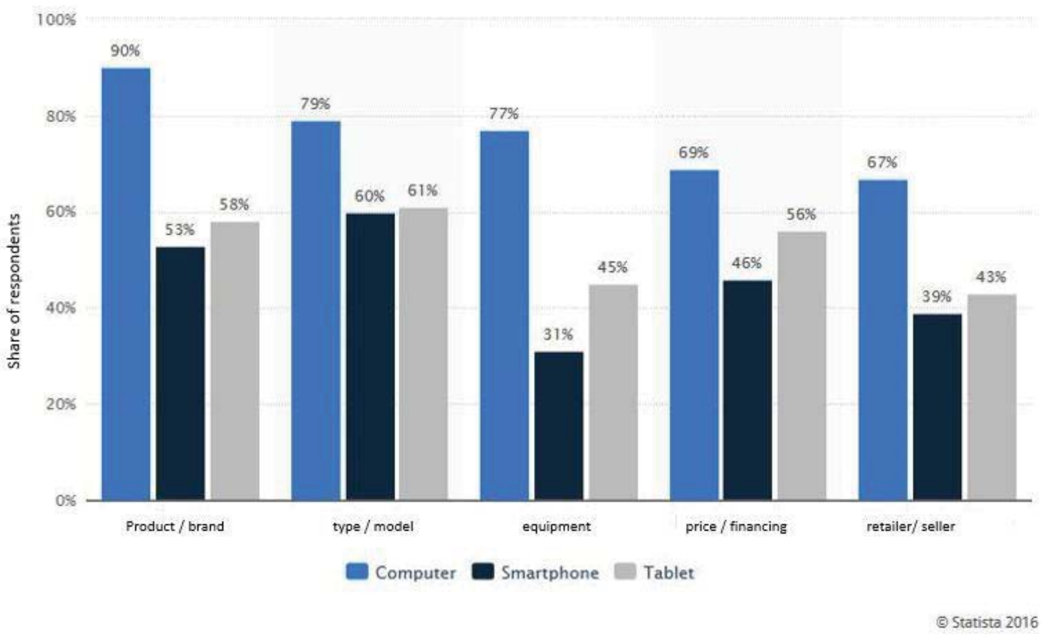

Figure 15: Percentage of used media devices according to the different research topics in the automotive customer buying process in Germany in 2016.

This statistics from 2016 show “computer” as the most often used device during the information phase. It is not distinguishable in this data whether it denotes laptops or stationary PCs; it can be assumed that the category holds both types of devices. Next to computers, smartphones and tablets are mentioned as favored devices. It

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72 (Google Neuwagenkäufer Studie, 2015).

seems, however, remarkable, that the share of smartphones and tablets is quite similar, since the ownership of tablets (42.5%)[73] is not as widespread as the ownership of smartphones.

Another interesting aspect is, again, the factor of age in the information search process. Figure 16 shows the share of online researchers in Germany according to the different age groups. Although the internet found its way into the repertoire of all generations, it is still visible that the young people below 25 y/o do even more online research than the average consumer, i.e. Gen Y and Gen X.

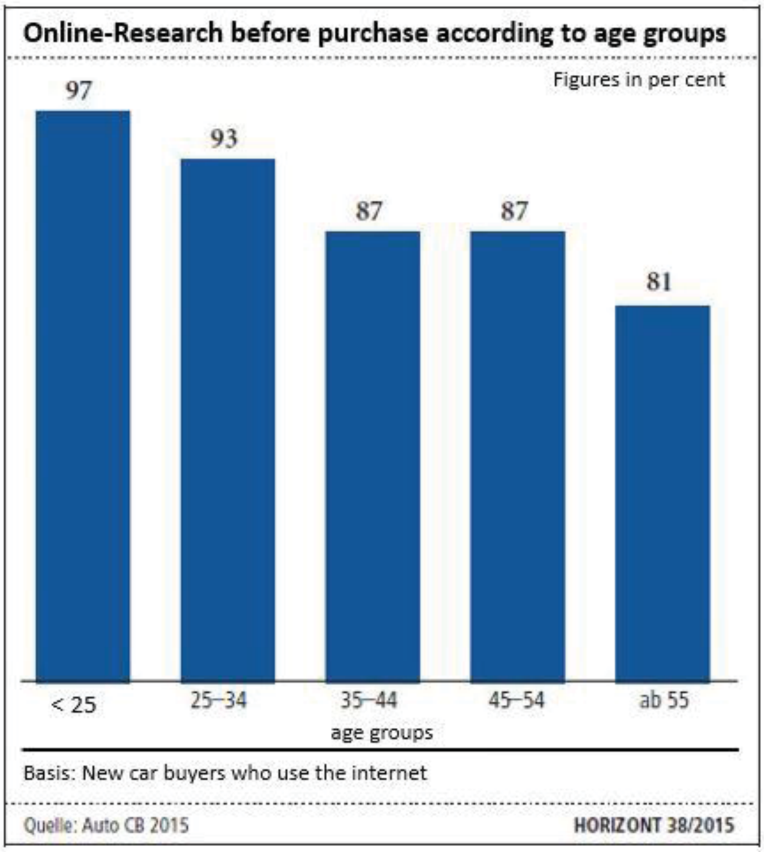

Figure 16: Share of online researchers before purchasing a car according to age [%].

73 (statista, 2016).

Evaluation of alternatives

During the evaluation of alternatives, the customer uses the information gathered in the information search phase to further evaluate alternative brands in the product category. The customer forms beliefs and attitudes about all the available products. These beliefs and attitudes are based on a set of attributes chosen by the buyer, which he uses to evaluate a product. Each attribute is on a certain level of importance for the customer. Based on these levels of importance of the attributes, he will form beliefs regarding the performance of different brands on this attribute.[74]

Since the information search and evaluation of alternatives are both done a lot online, it is difficult to really distinguish between these phases. Information search as such does also include the comparison of products on the basis of different field reports and comparison of technical details on the producer's website or comparison platforms. It is now of special interest for the automotive business to get hold of the attributes that are taken into account in the product comparison of cars.

Figure 17 gives a list of the most important attributes regarding the car buying process in Germany during 2014 and 2015. More than 23.000 participants were interviewed on their most important criteria; safety, reliability, and price-performance ratio were ranked the top three attributes. Elevated seating position was ranked the least important attribute, but remains still important for almost 50% of participants.

The picture is similar for Digital Natives. When asked about their motives, purchase intention and behavior regarding the automotive business[75,76], 51% of individuals between 18-25 y/o report having their own car, while 31% can at least use a car within the family. Of those participants owning a car of their own, brands belonging to the Volkswagen concern were the most popular among young people in 2010 (Figure18).[77] Every third participant was driving a car from VW, Audi, Seat or Skoda. Volkswagen holding a share of 24% was followed by Opel (17%) and Ford (12%). The main reason for buying a new car was by far „very favorable price".[78]

74 (The Market, Media, Life., 2016).
75 (Bratzel, 2014).
76 (Bratzel, Lehmann, & Tellermann, 2011).
77 (Bratzel & Lehmann, 2010).
78 Ebd.

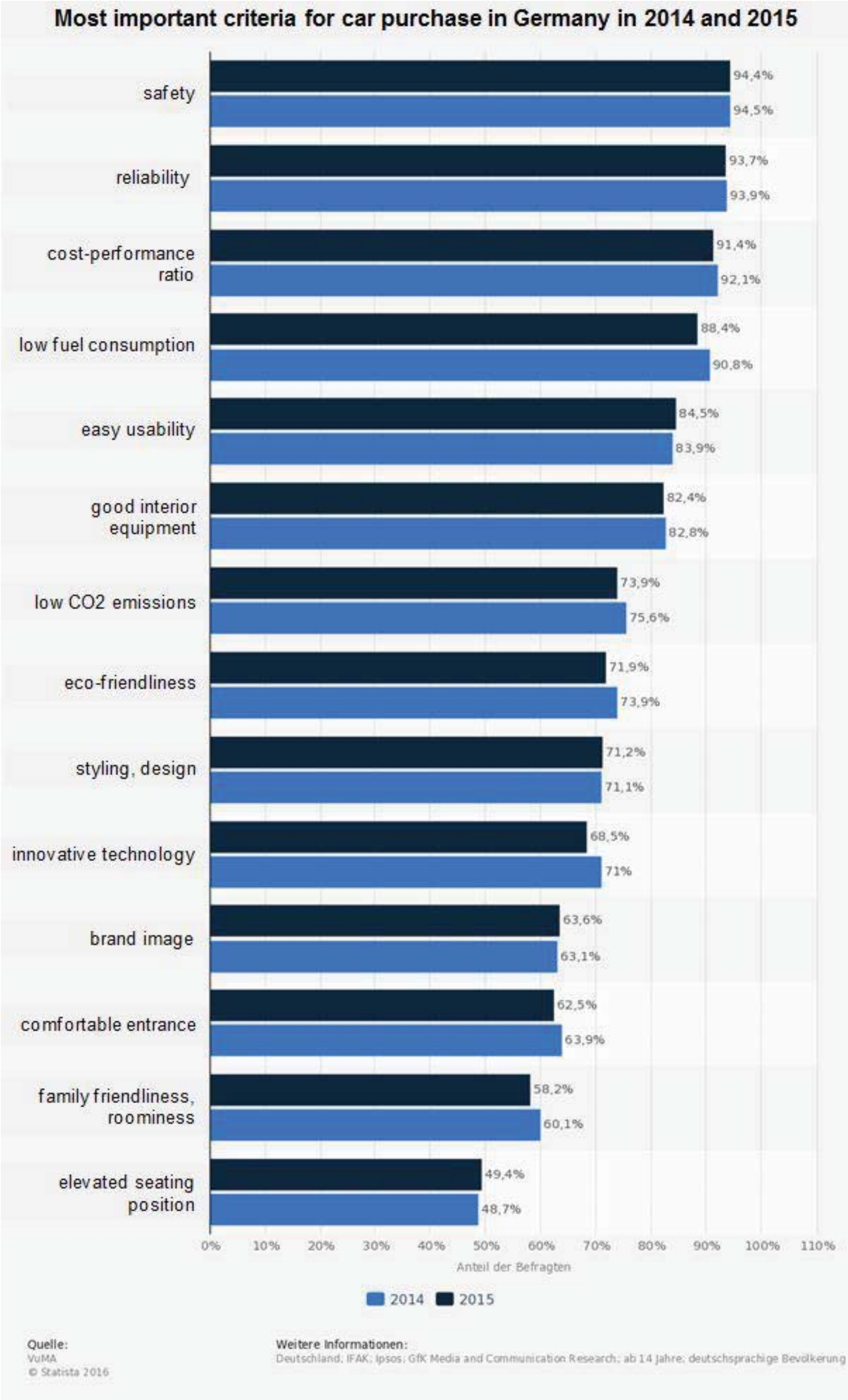

Figure 17: List of most important attributes regarding the car purchase in Germany in 2014 and 2015.

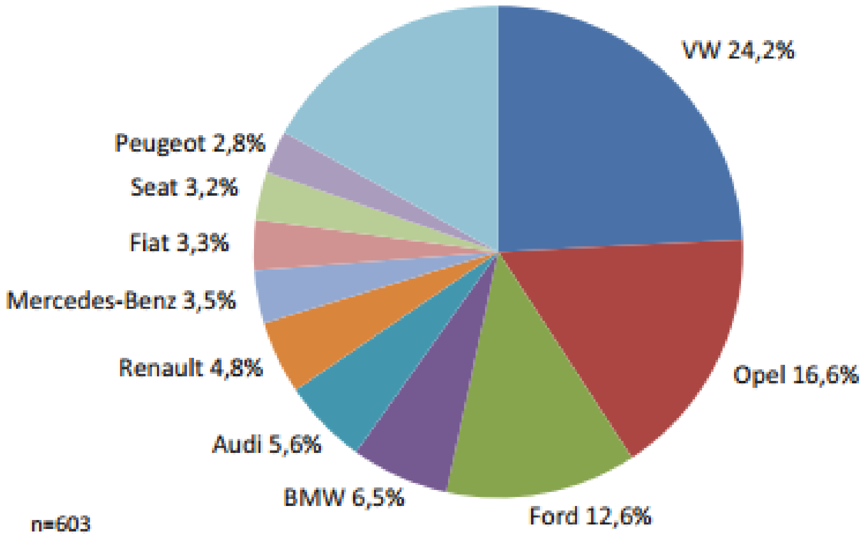

Figure 18: Current car brand (2010) of young car-owners.

Due to the low income of young people, premium automotive products like BMW, Audi, and Mercedes play a secondary role in the choice of a suitable model. Nevertheless, the premium brands do awake interest in young adults. When asked which automotive brand was "the most interesting", 29% of women and 40% of men between 18 and 25 y/o rated Audi the most interesting brand. It was followed by BMW (18% women, 16% men); Mercedes was rated the third interesting brand for men (8%) while women prefer VW (10%) as the third interesting brand. In Audi and BMW, young people like mostly the design (83%) while in Mercedes quality is named the most striking characteristic.

Purchase decision

The purchase decision is the customer's decision to buy a specific brand. This decision is based on the information search and evaluation of alternatives, that led to specific beliefs and attitudes of a product of a certain brand. Usually, the customer buys the brand that he prefers the most, unless one of two possible factors interfere the process. The first factor is "attitude of others". If a person in the customer's life plays an important part and has a certain belief towards a product or brand, this can lead to peer pressure. For example if someone within the family of a future car buyer shares a bad experience about the brand the customer was about to buy, this can change the customer's behavior even in the short run.[79] The second factor that could change the purchase decision can be summarized as "unexpected events". For example, the purchase decision will usually include factors like the customer's income level, price of the product, and expected benefit when buying the product. However, if there is a sudden change in situation, like unexpected sales or maybe sudden unemployment, it will certainly affect the purchase decision.

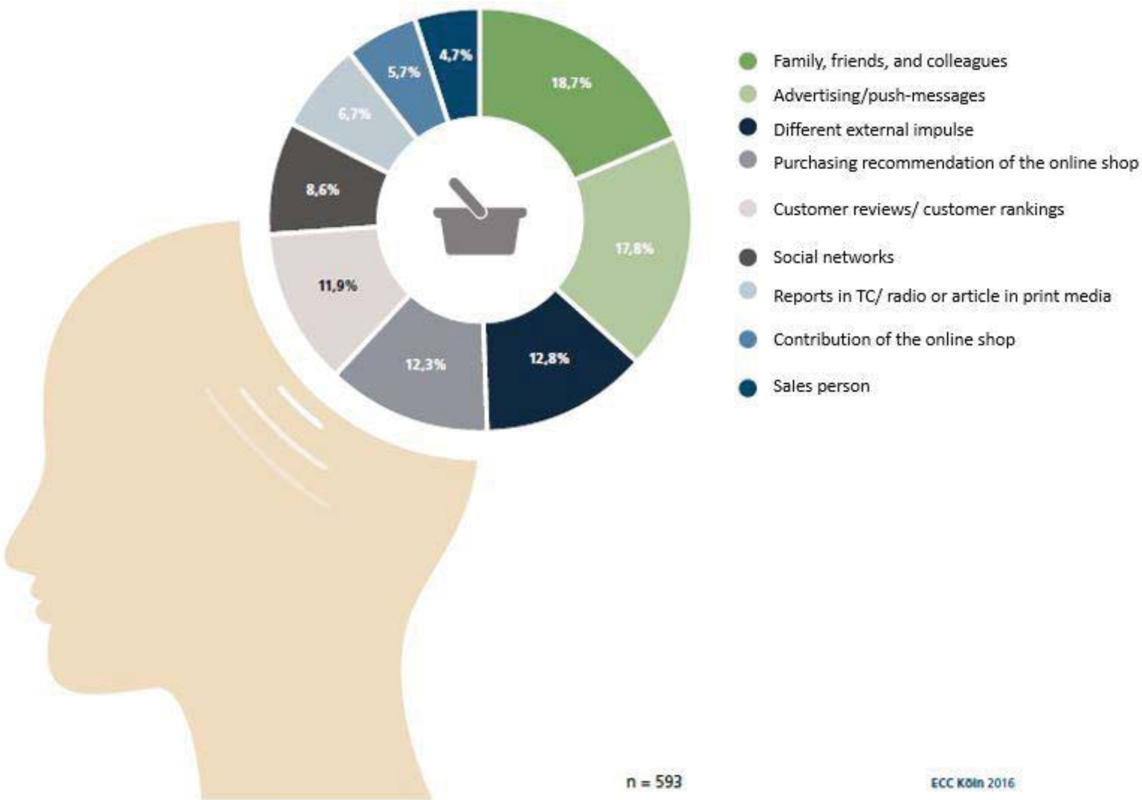

Figure 19: Shares of external triggers for the customer's buying impulse when the customer is out, i.e. does not do online shopping at home.

Besides the already explored attributes that result from information search and evaluation of alternatives, purchase can also be triggered by external factors. Figure 19 gives and overview on the shares of the different external factors influencing the buying decision in situations when the customer is not at home. Surprisingly, also today, word-of-mouth marketing, i.e. recommendations from family, friends, and colleagues, is still the most important external source triggering new customers,

[79] (The Market, Media, Life., 2016).

despite the possibility of doing online research. Advertising and push-messages are the second important external trigger with accounting for almost 18%, followed by purchasing recommendation from online shops. Costumer reviews (11.9%) and social media (8.6%) are also important triggers.

For the automotive industry, there are some special circumstances that have to be taken into account when analyzing the purchase decision. Although the vast majority of customers settle for the use of the internet in the phases of information search and evaluation of alternatives, many of them visit a dealer in the following to finalize the purchasing of a car. Although only 44% of customers rate the dealer as the most important source of information (Figure 20), on average 2.3 trips to the dealership and 1.3 road tests of the car take place before the final purchase decision.[80] In 2015, still eight out of ten customers bought the car at a licensed dealership; only 20% went for an online purchase of the car.

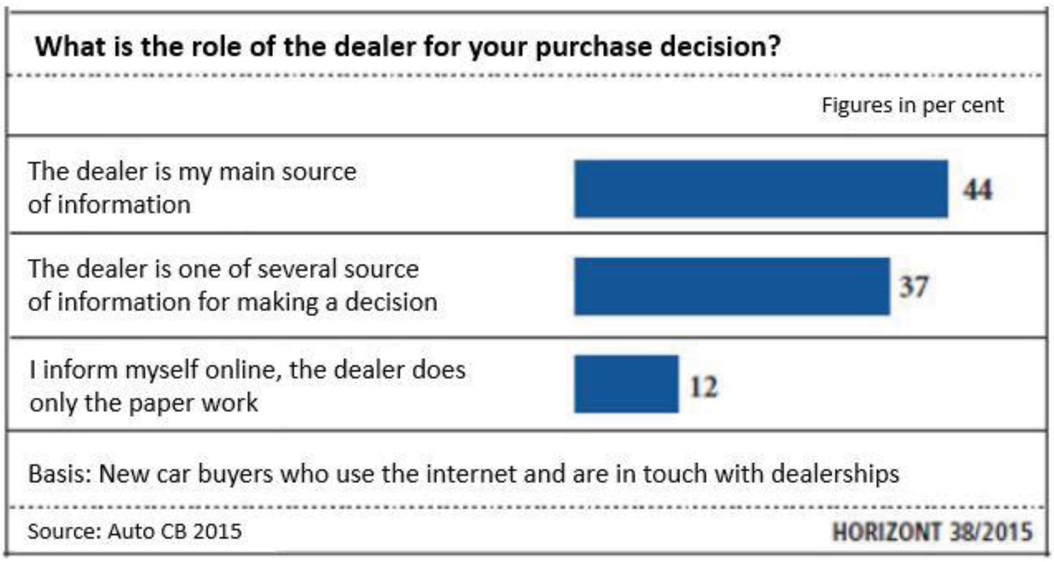

Figure 20: Role of the dealer in the car buying process.

Figure 21 gives an overview on the main reasons for preferring a licensed dealer as opposed to buying a car online. Discount campaigns and promotion are the most important factors (44%) closely followed by previous good experiences (43%) and customer service (39%). Nevertheless, the number of consumers who are willing to buy their car online is growing. Internet brokers have specialized on the

[80] (Google Neuwagenkäufer Studie, 2015).

procurement of cars during the last years. Their business model is based on offering very high discounts - even on customized cars – that lead the customer to buying directly online. Internet brokers can offer these discounts by keeping the cost of distribution channel very low.

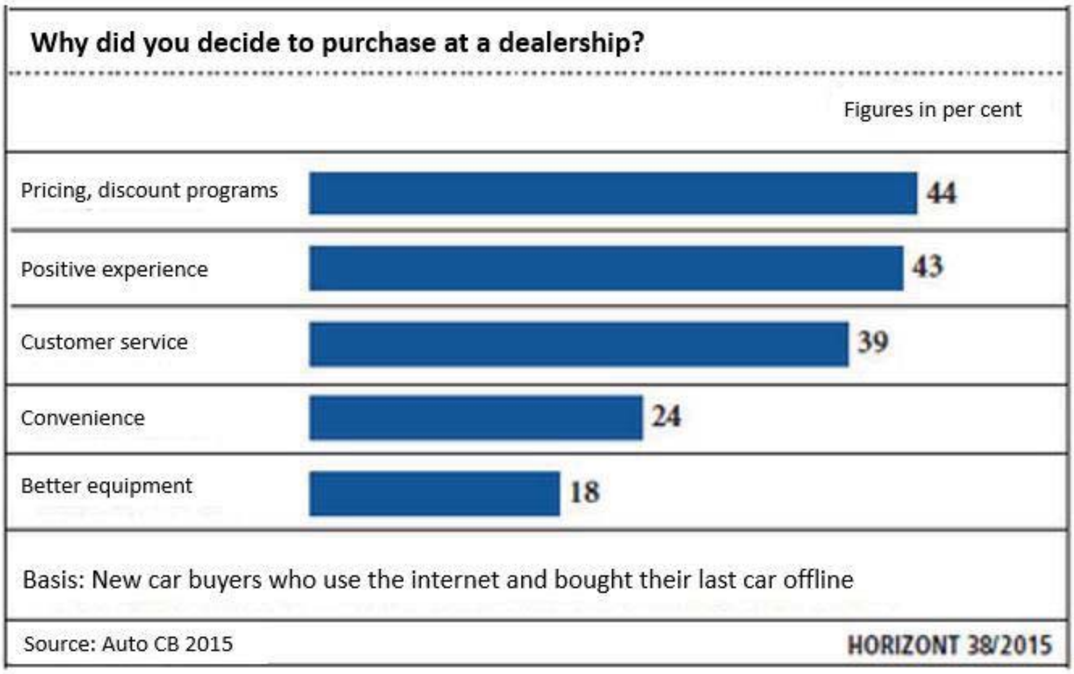

Figure 21: Reasons for buying a car at the dealership instead of doing an online purchase.

The average discount on regarding the 25 most top selling cars in Germany in 2010 was 17%. The highest discount was 27% for the Fiat Panda, which is much more than a regular dealership can offer the customer. Figure 22 gives an overview on all modes. This huge customer advantage in pricing is the most important driver for a growing share of online car purchase. Only 2% of customers cannot imagine at all buying their car online. In general, the willing ness to buy online grows with the discount offered by the online broker (see figure 23). 16% of people would buy a new car online when offered a discount of 12% on the price of a regular dealership.[81]

Already in 2010, 26% of customers visited such an online broker before making their final purchase decision. Surprisingly only very few of them used the offer in their final purchase. The main reason for this behavior is the lack of reputation and

[81] (Duddenhöfer, Duddenhöfer, & Stephan, 2010).

familiarity with the concept of online brokers in the automotive business. With the increasing reputation of the concept, higher online sales also in the automotive business are to be expected.

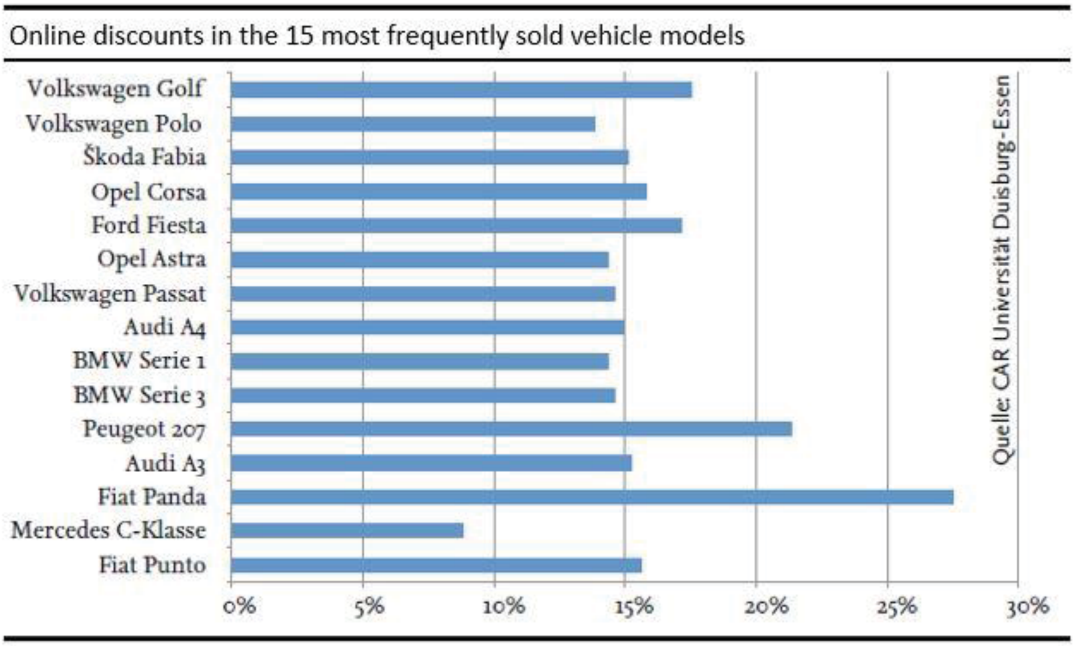

Figure 22: Average discounts for the 25 top selling cars in Germany when purchased directly online via an internet broker.

In individuals between 18 and 25 years, the final reasons for the purchase decision seem to be similar to the rest of the customer population. However, some differences are noteworthy between the genders. Men and women both look for a good cost-benefit ratio (women 26% and men 23%) and design (women 26% and men 27%). In young men, engine performance plays also an important part (14%) while women look for low maintenance cost (16%) and safety (12%) in a new car. Safety is only a decisive factor for 4% of men, i.e. plays a minor part.[82] Altogether, the results indicate that young women have a more rational view on the car than men do. For a new car that has an “absolutely positive image”, only 40% of women but 55% of men are willing to pay more money. On the opposite, 45% of women would be willing to pay more for a car that is very ecofriendly as opposed to only 32% of men.[83]

82 (Bratzel, Lehmann, & Tellermann, 2011).
83 (Bratzel & Lehmann, 2010).

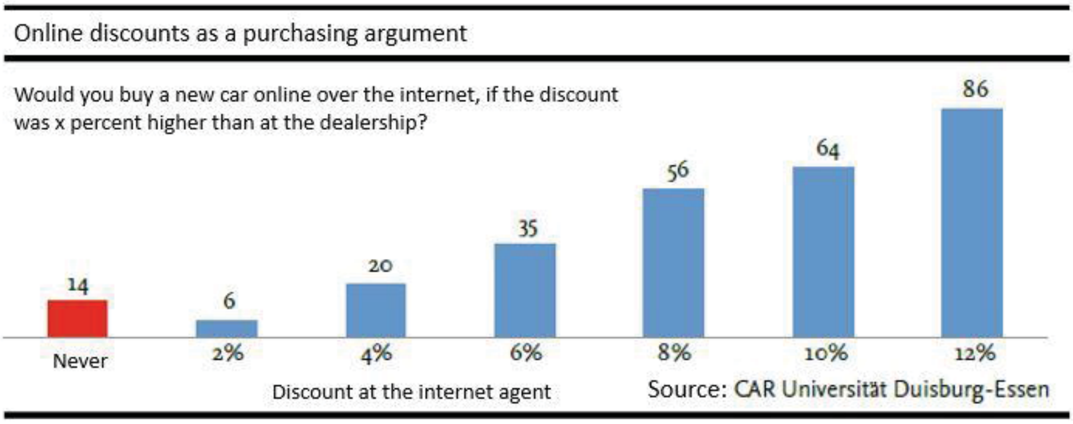

Figure 23: Share of costumers willing to buy their car online according to different price reductions that work as incentives (n=526).

Post-purchase behavior

After the customer bought the product of his choice, the consumer evaluates if the product's performance is matching their expectations. The perception of the actual performance of the product (post-purchase) creates satisfaction or dissatisfaction in the customer. If the product matches or exceeds the initial expectations (pre-purchase) of the customer, the customer will feel satisfied. If the customer's perception of the product's performance is less than their expectations, the consumer will be dissatisfied.[84]

This perception of the product and the customer's feeling about a certain purchase will influence his future actions significantly, i.e. if he will purchase the product again or consider other products from the same brand. The sharing of positive or negative experiences is also an important part of post-purchase behavior. A possible feeling of dissatisfaction results in buyer's discomfort, which is called cognitive dissonance. The engagement of customers in post-purchase communications can influence their feelings about the purchase and future purchases, too.
In the car buying process, two aspects play an important role during the post-purchase phase. Firstly, the so-called buyer's remorse (or buyer's regret). A car is usually a classic example of a high involvement purchase, i.e. an item on which the customer invested a great deal of resources researching and comparing his

[84] (The Market, Media, Life., 2016).

options.[85] For these high involvement purchases, it is likely that the buyer will develop a certain feeling of unease. That is, he will question whether he made the right decision or should have bought another product. This experience of post purchase cognitive dissonance varies due to the permanence, cost, importance and difficulty of the decision. Since nobody wants to believe they made the wrong decision, customers tend to rationalize their decision, either by evaluating former alternatives with a cognitive bias, or by preferring to focus on the weaknesses of alternatives and the strengths of the own purchased product. This cognitive bias is called post purchase rationalization and it helps the customer feeling confident about his purchase decision.[86]

Secondly, customers are very willing to endorse products to their family and friends. This product recommendation is not limited to products that they purchased themselves, but also extended to vehicles of other brands. More than 50% of customers, who considered four or more brands, recommended at least one brand. Besides, more than 40% of people that considered three brands recommend at least one brand to their peers which is different from the brand they actually bought.[87] Recommending cars to other potential clients is thus a major activity as part of the post purchasing process. This highlights again the importance of engaging the customers in post-purchase communications.

Summary

The customer buying process is split into five phases: Need recognition, information search, evaluation of alternatives, purchase decision, and post purchase behavior. In general, the internet has changed all phases of the customer buying process, especially the information search and evaluation of alternatives.

All generations use the internet in these phases and the use cases are also similar for all of them. As expected, the usage time and frequency in the buying process is increased in Gen Z as opposed to Gen Y and Gen X. As a consequence of the wide spread use of the internet, the retailer loses his significance in the process and is merely point of sale for the customer. The internet has also replaced the dealership as the first point of contact for the car buying process. Nevertheless, most cars in Germany are still purchased in traditional dealerships due to the reason that many

[85] (Boundless Marketing, 2016).
[86] (wds - A Xerox Company, 2016).
[87] (Deloitte., 2014).

customers do a road test with the car before buying it. Safety, reliability, and price-performance ratio were ranked the top three attributes when comparing different alternatives in the car buying process.

Due to the young age of Gen Z, statements regarding their customer behavior are only possible to a limited extend. There are, however, trends that can already be predicted from what we know today about Gen Z. When buying a car, a good cost-benefit ratio is the most important attribute, followed by design.

4. Questionnaire Study and Expert Interviews

In the previous chapters, the mobility behavior in the different generations as well as some corner posts of consumer behavior have been highlighted. In the following, a group of Gen Z members are interviewed about their modal mix as well as customer buying process with special focus on the use of social media. Besides Gen Z, experts from the automotive industry are interviewed about their expectations regarding generation Z as customers. Moreover, the role of social media in future customer engagement will be explored.

4.1 Goals of the survey

The goal of the study is to gain insights on Gen Z's attitude towards the individual mobility and importance of the car. Furthermore, their expectations regarding future mobility will be evaluated, i.e. whether the ownership of a car or other options, like for example car sharing, seem more appealing to Gen Z.

As already mentioned above, the survey focuses on the geographical region of Munich in Germany. Munich is the third largest city of Germany and the 12th biggest city of the European Union. It has a population of approximately 1.5 million people. Moreover, the Munich Metropolitan region comprises 5.8 million inhabitants in total. Munich was chosen as the focus of the study because of two reasons:

Firstly, in comparison to the bigger cities Berlin and Hamburg - as well as to the German average – Munich has the highest population of working age, i.e. people between 15 and 64 years old. A population of working age is generally split in two groups:

a) The so-called group of "younger workforce", i.e. individuals of 15 years until under 40 years and
b) The group of "elder workforce", dominating individuals between 40 and 64 years. Munich has the highest amount of younger workforce, i.e. 52.5% of the population.

That means the youngest employees in the area now starting their working life - and thus represent a certain share of market potential - already belong to generation Z.

Consequently, individuals belonging to this group have an own income in parts, that they could potentially spend on mobility, and purchase of an own car eventually.

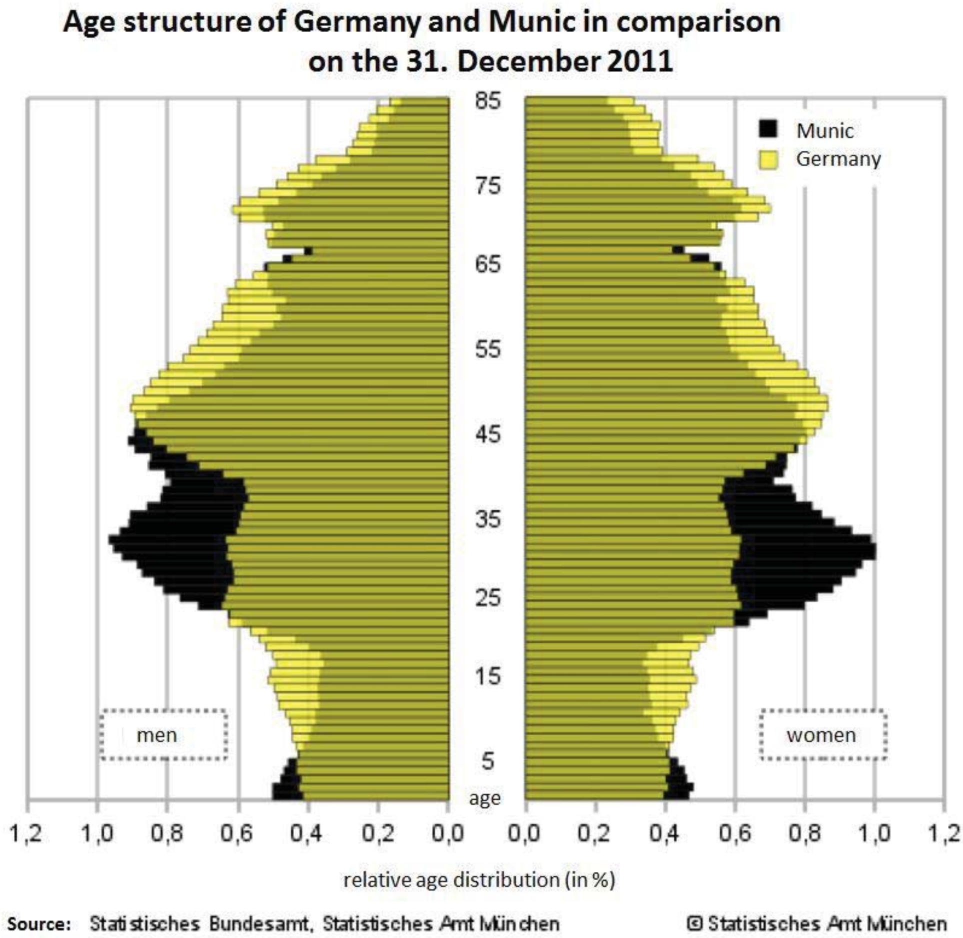

Figure 24: Age distribution of the population in Munich.

The second reason for choosing Munich as the geographical focus of the survey is, that the size of Munich city and the Munich Metropolitan Region in general allows for a high diversity in the modal mix. The area comprises public transport incorporating underground railway, suburban trains, trams and buses, as well as individual transportation like cars, car sharing, bicycles etc. As typical for urban areas in general, there is no necessity to use transportation by the own car but instead people can chose one means of transport over another given the advantages and disadvantages of the different options. Accordingly, the use of alternative concepts like car sharing or the like become a realistic option instead of just intellectual pastime. Moreover, it is likely that Individuals in the area already came already into contact with the different options of transportation and could form an opinion.

4.2 Method

To identify the current status of the customer buying process, the five phases as described by Kotler were investigated. In doing so, questions regarding each phase in the process are comprised in the questionnaire, i.e.: need recognition, information search, evaluation of alternatives, purchase decision, post-purchase behavior. Moreover, the survey seeks to evaluate whether the members of Gen Z living in the metropolitan region of Munich follow those findings proposed by literature in their attitudes towards the car. In the following, the construction of the questionnaire is described. The full questionnaire including all answering alternatives can be found in the appendix.

4.2.1 Study Design

Gen Z was interviewed via an online questionnaire that contained mainly closed questions. The questionnaire was constructed via Google forms. Subsequently, the participants received a link with which they could assess and fill in the form. A descriptive analysis was then performed on the resulting data. The group of participants is- adversely to the initial definition of 20- year age spans – extended to individuals born from 1990 onwards. These participants are already Digital Natives and the approach holds the advantage of comprising more individuals already given the possibility of taking part in the individual motorized traffic.

4.2.2 Construction of the questionnaire

The questionnaire comprises nine subsections handling 54 questions overall:

- Introduction
- Modal mix
- Need recognition
- Information search and evaluation of alternatives
- Purchase decision
- Post-purchase behavior
- Gen Z’s attitude towards the car
- The automotive customer buying process
- Expectations regarding future mobility and customer engagement

The participants were not aware of the different subsections in the questionnaire, i.e. there was no visual separation or subtitles in the online form. The questionnaire consisted mainly of closed questions. The answers were assessed either by multiple-choice checkboxes, multiple choices of which the participant had to choose one option, and five-step scales. The possibility for open comments is only given at the very end of the questionnaire.

Introduction

The introduction of the questionnaire contains a short explanation regarding the goal of the study, a statement regarding the privacy of all given data and the fact that the evaluation of data is anonymous.

The first part of the questionnaire poses questions regarding the metadata of the participants, i.e. gender, year of birth, living situation, and income. The living situation offers four possible answers:

- "I am living alone."
- "I am living with my parents."
- "I live alone during the week but with my parents/family on weekends."
- "I am living in a shared apartment."

The participant can only choose one of the options. The questions regarding gender, year of birth, and living situation are mandatory. The question regarding the income of the participants is voluntary to avoid a possible break-off of the online questionnaire because of fear of misuse of data. Moreover, the youngest members of Gen Z are very likely to not have an income on their own but rather rely on provision by the parents and pocket money.

Modal mix

The following section of the questionnaire deals with the topic of modal mix. The initial question refers to the ownership of a driver's license and possible reasons for not having a driver's license. Besides, five questions regarding the modal mix were posed, they inquire:

- frequency of travelling
- travelling reasons
- travelling duration

- travelling distances
- used means of travelling

All questions are closed, i.e. pose answering alternatives, and the answering is mandatory.

Need recognition

Since the topic of need recognition varies very much according to the product in focus, this paragraph focused only on external stimuli, i.e. advertising. The issue is again addressed in the part of the questionnaire that deals with automotive topics. Four questions were posed regarding the topic of need recognition:

- “I have already bought a product because there was a special campaign, e.g. price reduction, deal-of-the-day etc”.
- “Which medium is the one you perceive the most advertising on?”
- “I have already found out about a product because of advertising and bought that product subsequently.”
- “Have you ever watched advertising on purpose, e.g. funny advertising clips on Youtube?”

Information Search and evaluation of alternatives

The next paragraph shortly addresses the use of different (mobile) devices by Gen Z. Subsequently the customer behavior of Gen Z in general is investigates. Firstly, the topic of information search and evaluation of alternatives was assessed. When investigating the means of gathering information, the participant could choose between the following alternatives:

- “I inform myself via personal contacts (family, friends etc).“
- „I ask a sales person at the store.“
- „I gather information on the producer’s website.“
- „I visit a store and test the product in real life.“
- “I mostly rely on TV and/or radio information.”
- „I inform myself via social media (Youtube, Snapchat, Instagram etc).“
- „I use search engines to find field reports and customer ratings.“

The participant could chose more than one answering alternative.

Subsequently, participants were asked: " Which source of information do you regard as the most reliable?" with the same answering options, i.e.:

- personal contacts (family, friends etc)
- sales person at the store
- producer's website
- product test in real life
- TV and/or radio information
- social media (Youtube, Snapchat, Instagram etc)
- field reports and customer ratings

Another question was "How many brands do you usually take into consideration when you start searching information about a product you want to buy?"

The answering alternatives ranged from "1" to "10 or more".

In addition to this question, interviewees were asked two additional questions on the use of online information:

1. "Can you imagine purchasing a product even if there is no online information available?"
2. "Is it more likely that you buy a product on which you can find positive user field reports on social media?"

In both cases, the participant's assessment was performed on a five-step scale denominating values between "No, that is very unlikely" and "Yes, that is very likely". The two last questions are important to both, the topic of information search as well as to the final purchase decision.

Final purchase decision

Regarding their final purchase decision in general, Gen Z was asked five questions.

1. "Do you agree to the statement "I prefer purchasing everything online."" Here, the assessment was also performed on a five-step scale.
2. "If more than one product comes into consideration, which are your three most important criteria for purchase?"
3. "Which is THE most important criteria to purchase, if more than one product come into consideration?"

For the questions two and three, the participant was given the same list of answering alternatives from which to choose.

Moreover, participants were asked if a bad online presence of a producer is an obstacle for buying the product and if they could imagine buying an expensive product (price above 10.000€) online without having a personal contact to a salesperson. Apart from that, the order of product selection and vendor selection as described by Boersma is assessed:
“Would you agree to the statement:“

- “I first decide for a brand and select the suitable product from the product portfolio afterwards?”
- “I search for the most suitable product for my needs, the brand results from this process automatically.”

Again, the assessment was done via five-step scale.

Post-purchase behavior

For the final phase of the customer buying process, the post-purchase-behavior, interviewees were asked if they released own product ratings or field reports online and if they recommended a certain product to their peers even if they did not buy it in the end. Moreover, three questions regarding the possible reactions to positive or negative customer experiences were investigated:

- “Imagine you are dissatisfied with a purchased product. How high do you rate the likelihood of you filing a formal complaint with the producer?”
- “Imagine you are dissatisfied with a purchased product. How high do you rate the likelihood of you spreading a bad product ranking or sharing your negative customer experience in social media?”
- “Imagine you are very satisfied with a purchased product. How high do you rate the likelihood of you spreading a bad product ranking or sharing your negative customer experience in social media?”

Apart from that, they were asked if they would agree to the statement

- “When problems with a product arise, the customer service has to be accessible online in any case.”

For all questions, the assessment was done via five-step scale.

Gen Z’s attitude towards cars

The next section of the questionnaire deals with the attitude of Gen Z towards cars and other automotive products. The topic of need recognition in the area of transport is very specific and not comparable to other everyday products. The first questions targets the ownership of a car or possibility of use of a vehicle within the family, followed by the questions: “Do you agree to the following statement:”

- “Nowadays, you need a car of your own.”
- „A car is an object of prestige.”

Subsequently, the using of car sharing was assessed:

- “Did you ever do car-sharing before or use it on a regular basis?”
- “How high do you estimate the likelihood of you using car sharing in the future?”

The following questions target the perceived image of the car and OEMs. Participants were asked to rate the following statements:

- “I am going to buy a car for myself in the future.”
- “Cars are eco-friendly.”
- “Cars are important for my everyday-mobility.”
- “Cars have a good image.”

The assessment is again done on a five-step scale.

The automotive customer buying process

The next section deals with the automotive customer buying process. Given the fact that the youngest Gen Z members are children and teenagers, the answering of these questions is voluntary to not drift too much into hypothetical constructions. The first question is:

- „Which are the three most important decision criteria for you when you think about buying a car?“
- „Which are the three least important decision criteria for you when you think about buying a car?“
- „Which is THE most important decision criterion for you when you think about buying a car?“

The participants are given a multiple choice list from which they should choose the criteria.

Apart from that, the point of sale and circumstances of purchase were evaluated:

- „Can you imagine buying a car online without going to a licensed dealership?"
- "Would you agree to the statement: I first decide for a brand and select the suitable car from the product portfolio afterwards."
- "Would you agree to the statement: I search for the most suitable car for my needs, the brand results from this process automatically."

The assessment is again done on a five-step scale

Gen Z's expectations regarding future mobility and customer engagement

In the last section, their expectations regarding future mobility were evaluated:

- "What kind of features are essential for a car in the future in your opinion?" A list of answering alternatives was proposed from which the participant could chose as many as desired. Moreover, free comments, i.e. suggestions could be made.
- Please rate the following statement: "In the future, OEMs should offer more flexible programs for their products in the future, e.g. time-wise renting, sharing etc." The answer was assessed via a five-step scale.
- "How would you like to be informed about new campaigns or offers from OEMs?" Here, again, a list of answering alternatives was given from which the interviewee had to choose one.
- "I f you could invent a feature for a new car, what would that be?" This questions was posed as an open question.

4.3 Expert interviews

Besides the group of Digital Natives, experts from the automotive industry were interviewed using open questions. The goal of the interviews was, to compare the requirement side of Gen Z with the producer side of the OEMs.

- "What do you expect from Gen Z as customers in general?"

- “Do you expect Gen Z to have different customer requirements regarding connectivity, multimedia, and mobile devices?”
- “Are OEMs prepared to fulfil these customer requirements?”
- “For Gen Z, cars are not a status symbol any more. Do you think Gen Z will *buy* cars at all? Will OEMs have to come up with new car-sharing concepts etc?”
- “What will be the biggest challenge when trying to sell cars to Gen Z?”

5. Results

5.1 General findings

From the 34 participants, 60.4% were male and 39.4% were female. The majority (54.5%) lives with their parents or family, 21.2% live alone and another 21.2% live in residential communities.

The question regarding income could be answered on a voluntary basis and 23 participants reported their income. The picture is as diverse as expected from Gen Z and the age distribution of study participants. Figure 25 gives an overview on the reported income groups.

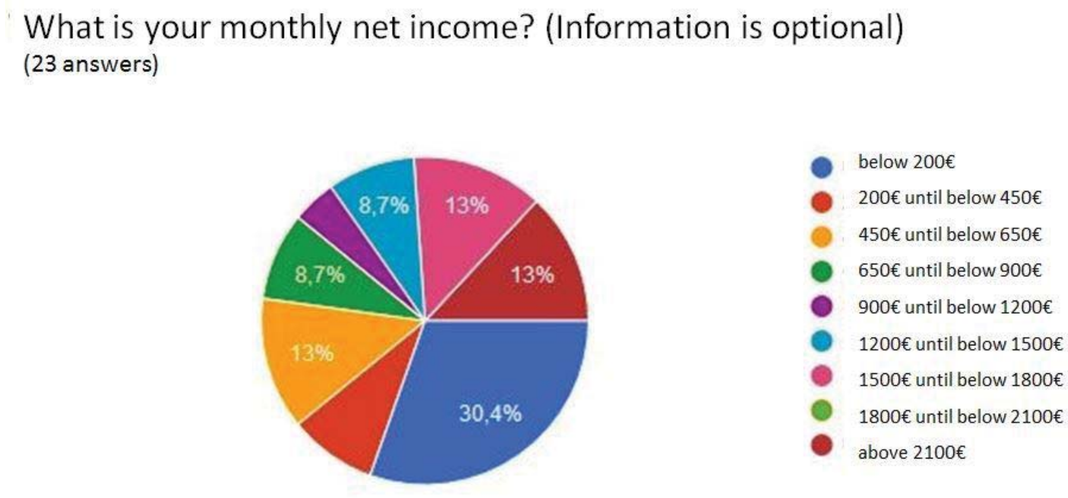

Figure 25: Reported income of survey participants.

Moreover, 82.4% report being an owner of a driver's license, 11.8% report being too young for having a driver's license, and 5.9% report that they are going to have a driver's license in the future. Surprisingly, only one person stated that he does not need a driver's license in general. The percentage of driver's license owners among the survey participants thus is considerably higher than the average reported in chapter 2 (74%).

Modal mix

The majority of participants show high mobility, 82.3% of the interviewees are out of the house several times a day or daily, 11.8% several times a week. As also reported in literature, the main reasons for travelling in Gen Z are leisure time and school/education. Figure 26 gives an overview.

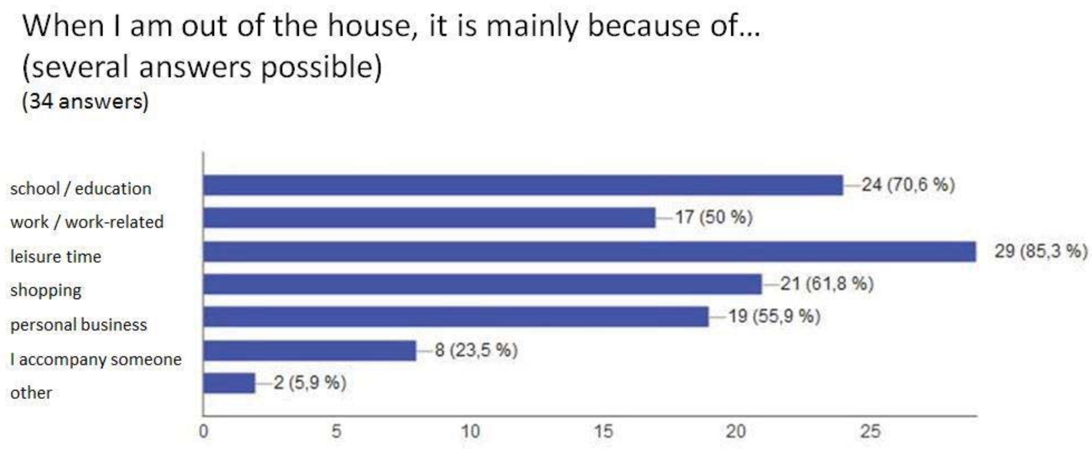

Figure 26: Travelling reasons of study participants.

The travelling time as reported from the survey is also typical for an urban area like Munich, 88.3% of participants state daily travelling durations from 30 minutes up to two hours (8.8% about 30 minutes, 32.4% about one hour, 35.3% about 1.5 hours, 11.8% about two hours).

Figure 27 gives an overview on the travelling distances as reported during the study. Here, too, the picture remains inconspicuous; 62.5% of participants report travelling times from up to 15km daily.

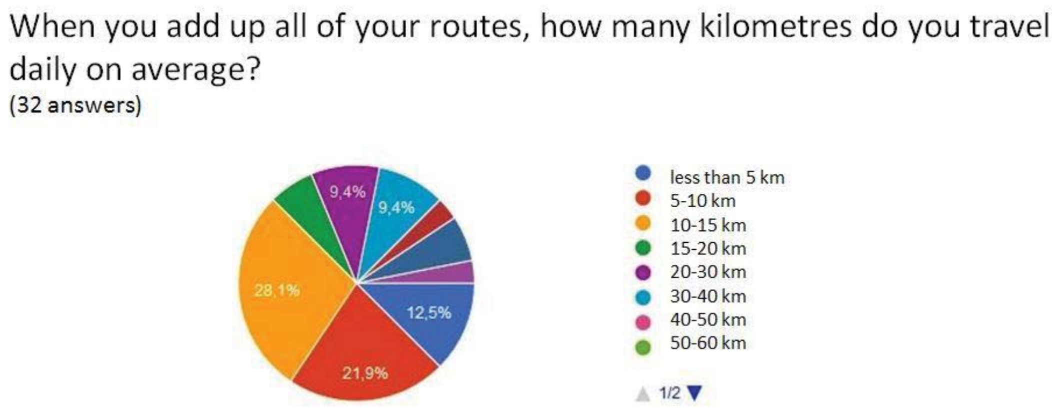

Figure 27: Travelling times of interviewees.

The means of transport are summarized in figure 28. As expected from Gen Z in an urban area, many interviewees go on foot, followed by the most used means of transport bicycles and public transport.

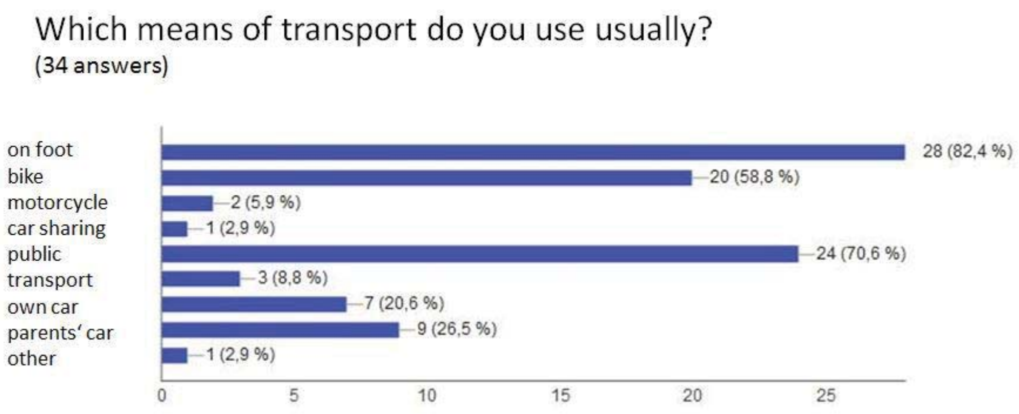

Figure 28: Generally used means of transport as reported by Gen Z.

5.2 The customer buying process in Gen Z

Need recognition

Gen Z report a high use of electronic devices in general, as expected. The majority of interviewees, i.e. 94.1% report using their mobile phone at least several times a week. The same hold true for laptops (76.5%); stationary PCs are still used several times a week by 38.2% of participants and tablets by 32.4%.

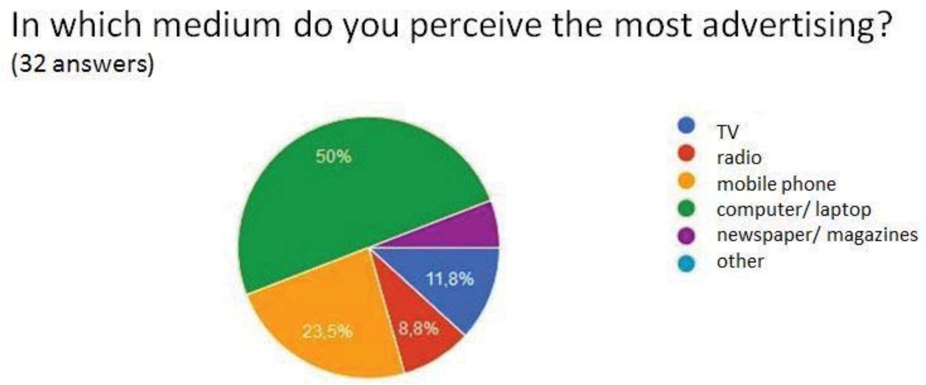

Figure 29: Devices on which participants perceive the most advertising.

Only 50% of interviewees report having found out about a product because of advertising and buying that product subsequently. Although the subjects seem not to be aware of the effect of advertising, 70.6% of participants report having bought a product because special campaign, e.g. price reduction, deal-of-the-day. Apart from that, 76.5% watched funny advertising videos, e.g. on Youtube on purpose.

Information Search and evaluation of alternatives

When talking about the information search and evaluation of alternatives, 88.2% of Gen Z search the internet for product rankings and user reports. This is by far the most widely used source of information, followed by personal contacts (67.6%) and manufacturer's websites (also 67.6%). Figure 30 gives an overview on the sources of information of study participants.

The most reliable source of information for 47.1% of participants are friends and family closely followed by customer reports and internet rankings (41.2%). Only 8.8% of interviewees think that testing the real product directly in the shop is the most reliable source of information.

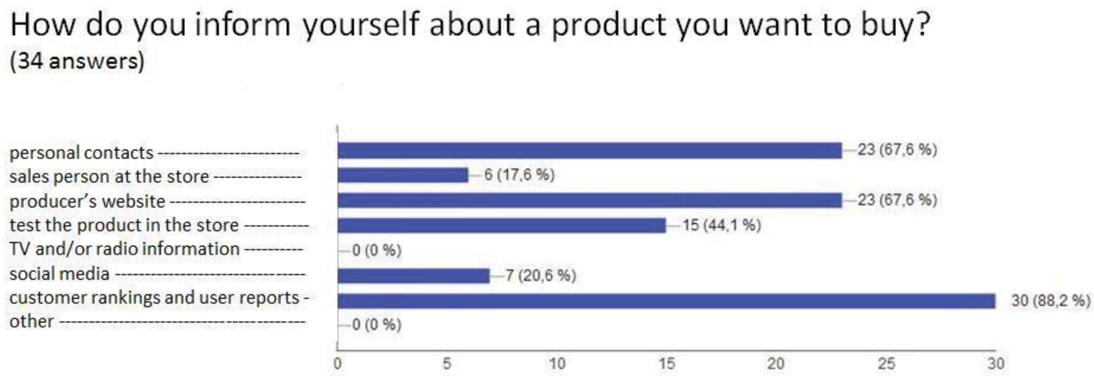

Figure 30: Sources of information of study participants.

When evaluating products from different brands, 9.1% of participants report not to compare products from different brands at all, 63.6% compare 2-3 different brands, and 21.2% compare 3-5 different brands. Only 6.1% of participants compare more than five brands. Moreover, 49% of participants report that they are more likely to buy a product when there are positive user reports about it on the social media (figure 31).

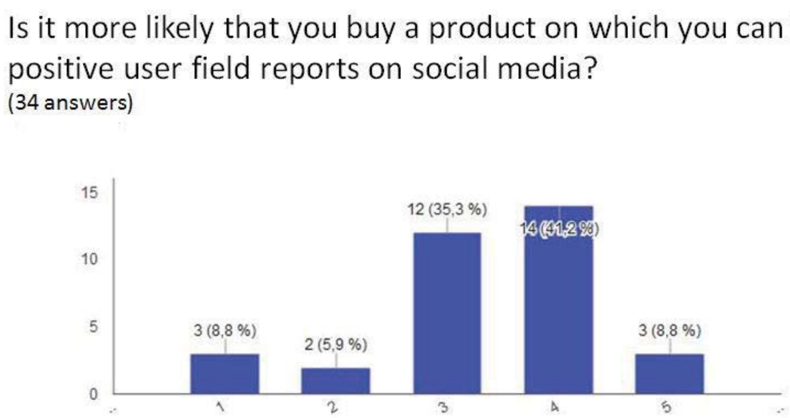

Figure 31: Participants user ranking of likelihood of buying a product when positive user rankings are available on the internet [five-step scale: 1=very unlikely; 5= very likely].

Final purchase decision

55.9% of interviewees agree to prefer buying everything online as opposed to 20.6% who do not agree to this statement. When more than one product is considered for purchase, better product details (76.5%), online-rankings of the product (55.9%) and lower price (52.9%) were chosen as the three most important decisive criteria for purchase (see figure 32).

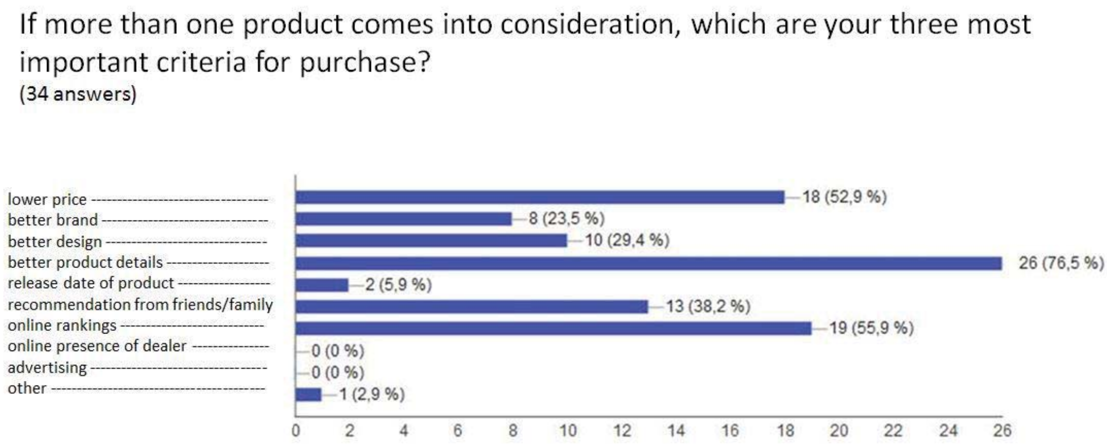

Figure 32: Ranking of the three most important criteria for purchase in Gen Z.

When participants had to decide for one criteria, i.e. THE most important criterion for purchase, 52.9% of participants chose better product details, e.g. technical details, followed by online rankings of the product 17.6% and 8.8% recommendations from friends. Only 35.3% of participants agreed to the statement that they would not buy a product because they did not like the online presence of the manufacturer.

In Gen Z, 79.4% of interviewees cannot imagine buying an expensive product (above 10.000€) without having a personal contact to a sales person as opposed to 14.7% who can imagine doing so.

Answers to the question of the order of the phases of the customer buying process as proposed by Boersma give a mixed picture. Only 24.3% of participants say they choose the brand first and decide afterwards for a product from the portfolio of this specific brand while at the same time 51.5% of participants do not agree to this statement. On the other hand, 45.6% state that they choose the most suitable product for their needs first and the brand is a result of this - while 42.3% do not a agree to this statement.

Post-purchase behavior

When asked about their post-purchase behavior, 38.2% of participants reported to have released own product ratings or field reports online, another 35.3% could imagine doing so in the future. Remarkably, 23.5 % reported that they do not give online rankings for products in general.

Apart from that, 63.3% of interviewees recommended a product to friends and family although they did not purchase it for themselves.

Moreover, figure 33 shows that the strong majority of participants agreed to the statement that a customer service must be available online by all means.

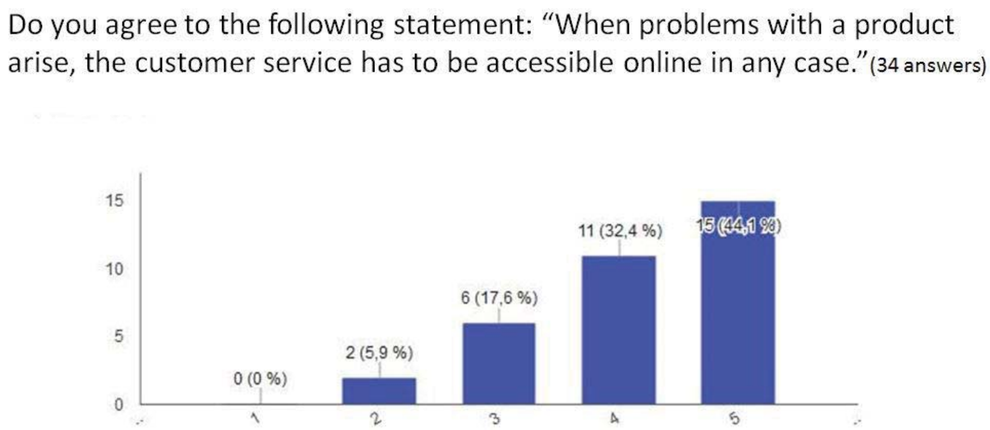

Figure 33: Ranking of importance of customer service availability online [five-step scale: 1=very unlikely; 5= very likely].

Despite Gen Z’s preference for using online services, the majority, i.e. 53%, of them states it was very unlikely or unlikely that they share a negative customer experience online via social media when dissatisfied with a product. On the other hand, 35.3% report it was very likely or likely that they share the negative experience with the product online.

At the same time, 35.3% said it was very likely they complained with the manufacturer when dissatisfied with a product, as opposed to 44.1% who state this was very unlikely or unlikely.

Gen Z's attitude towards cars

Although 63,6% of participants have a car on their own or can use on within their household, only 17.6% agree to the statement that you need a car of your own nowadays (see figure 34).

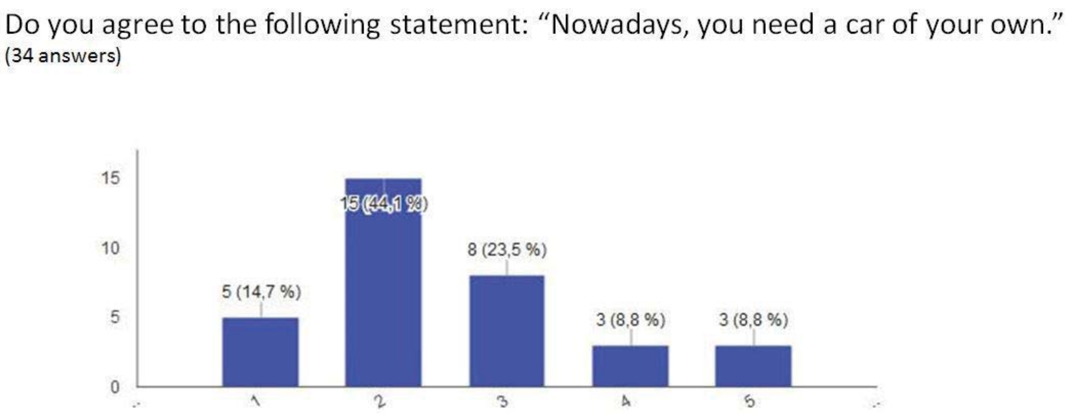

Figure 34: Participants' ranking of the statement "Nowadays, you need a car of your own." [five-step scale: 1=strongly disagree; 5= strongly agree].

Moreover, only 29.4% of participants strongly agree or agree that a car is an object of prestige as opposed to 44.1% who strongly disagree or disagree – as already expected from Gen Z.

Regarding alternative mobility concepts like car sharing, 57.6% of participants did not yet use car sharing; but they can imagine using it in the future. Figure 35 gives an overview on the usage of car sharing in Gen Z.

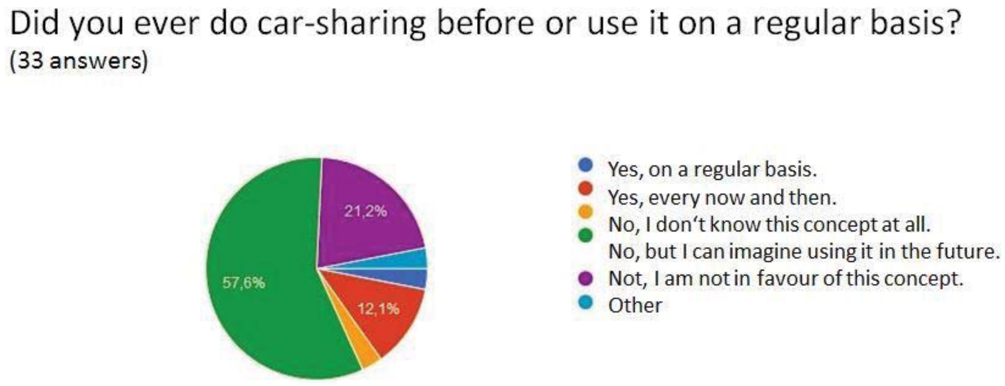

Figure 35: Overview on car-sharing usage in Gen Z.

While 27.3% of interviewees think it is unlikely or very unlikely that they buy a car for themselves in the future, after all 57.6% of participants want to do so.

In Gen Z, 79.4% strongly disagree or disagree on the statement "Cars are eco-friendly." Apart from that, 50% of Digital Natives strongly disagree or disagree on the statement that cars are important for their everyday mobility. Only 23.5% agree that cars have a good image as opposed to 38.2% who strongly disagree or disagree on this statement.

The automotive customer buying process

Figure 36 and figure 37 give an overview on the three most important and three least important decisive criteria for car purchase, respectively. Cost-performance ratio, safety and eco-friendliness were ranked the most important criteria, while multimedia/connectivity functions were surprisingly ranked as the least important criterion, followed by brand image and comfortable entrance.

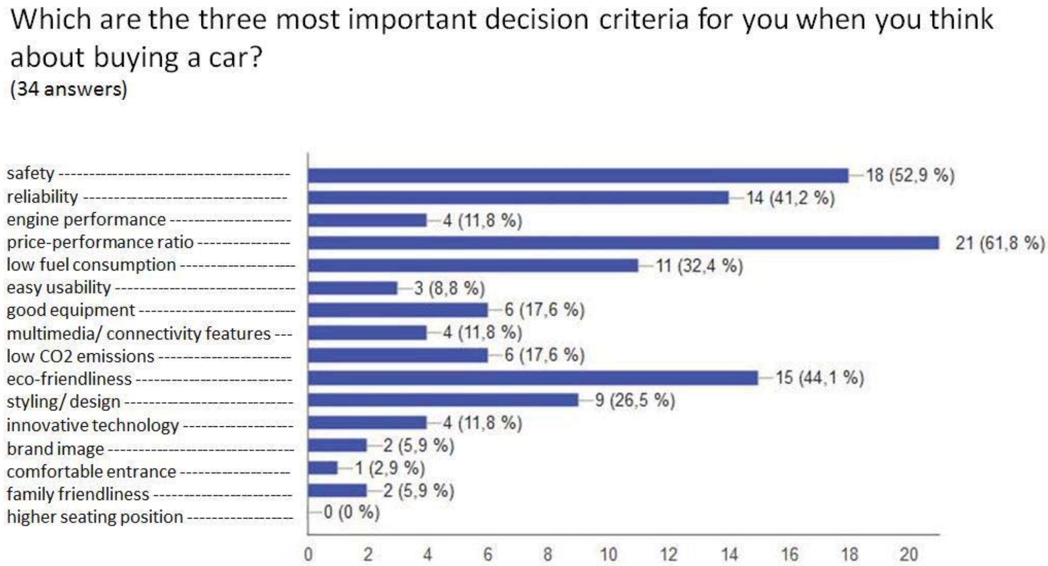

Figure 36: Ranking of the three most important decisive criteria when buying a car.

When participants had to decide for one decisive criterion for the purchase of a car, reliability and price-performance ratio (both 23.5%) were ranked the most important criterion followed by safety (20.9%) and eco-friendliness (11.8%).

In the car buying process, the order of product selection and vendor selection is clearer. 67.7% of participants agree on choosing the most suitable car for their needs first while the brand of the product results simply from this selection. Accordingly, 55.9% of interviewees strongly disagree or disagree on the statement “I first decide for a brand and select the suitable car from the product portfolio afterwards”.

Only 14.7% of participants can imagine buying a car online without visiting a car dealership, as opposed to 73.5% who cannot imagine doing so.

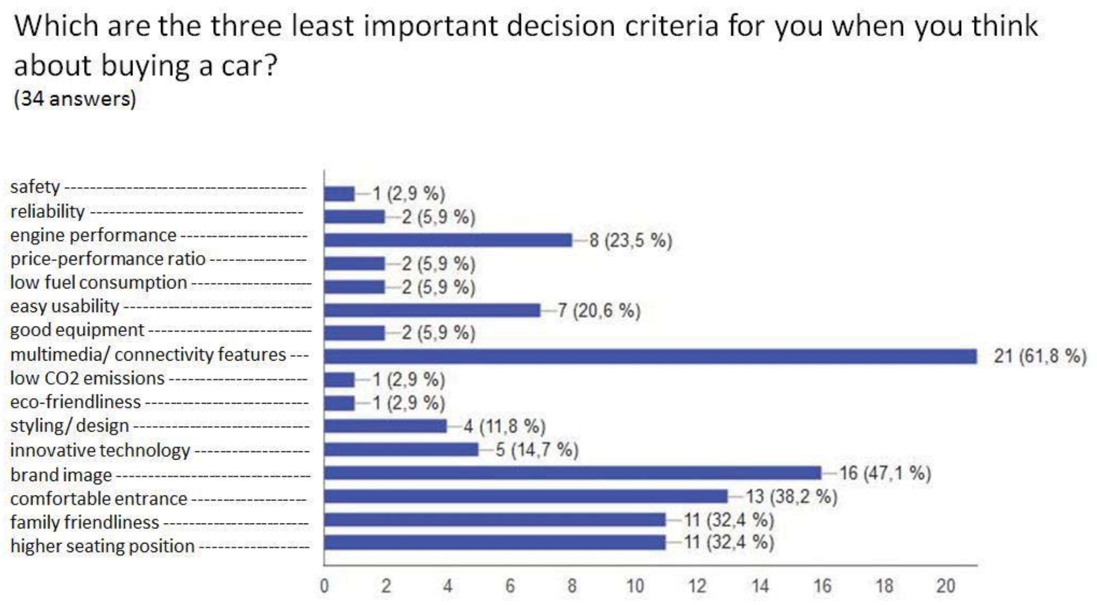

Figure 37: Ranking of the three least important decisive criteria when buying a car.

Gen Z's expectations regarding future mobility and customer engagement

Regarding the three most desired features for the car of the future, 94.1% of the Gen Z wish for eco-friendliness, followed by "everything should be configurable as I need it" (73.5%). 41.2% wish for a self-driving car, while 38.2% think the car of the future should be as silent as possible.

For 55.9% of Gen Z, eco-friendliness is THE most important feature for the car of the future, followed by self-driving and "as many multimedia-features as possible" (both 17.6%).

Moreover, 50% of participants strongly agree or agree that OEMs should offer more flexible concepts for the use of their products, like car sharing, time-wise renting etc.

Figure 38 depicts the preferred source of information for new campaigns or offers from OEMs.

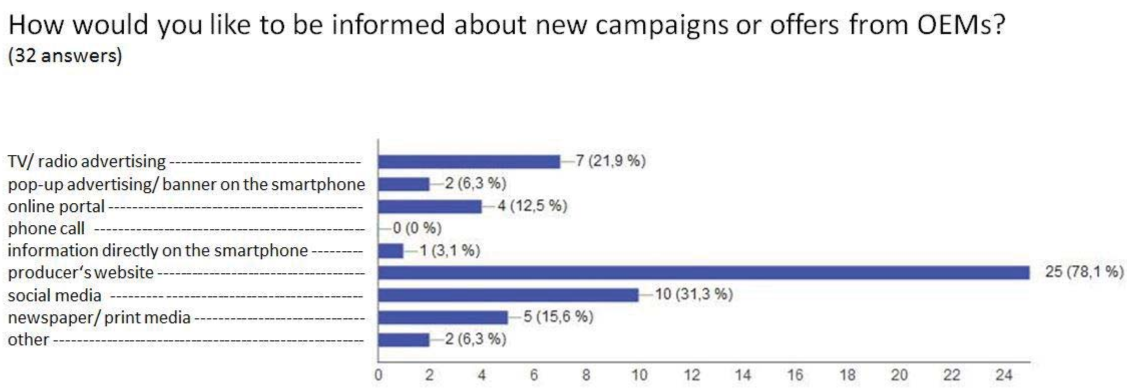

Figure 38: Preferred sources of information new campaigns or offers from OEMs.

5.3 Evaluation of expert opinions

In general, the different nature of Gen Z as customers arrived at the OEMs. All experts agreed, that the Digital Natives can be characterized as “always online”, feeling more comfortable with the internet than with traditional media. They are regarded as volatile users that follow emerging trends but also leave these trends quickly when they become outdated.

Moreover, Digital Natives in the automotive industry are expected to be consumers, not necessarily buyers of the product. This development would follow other industries, like e.g. the music business that transformed from ownership of CDs and DVDs to using streaming services like Spotify or online portals like Youtube. This expectation is also based on future technologies. When self-driving cars become common, it may no longer be necessary to give undivided attention to the process of driving. In such a case, the user in the self-driving car could become a consumer of e.g. media while driving.

An exception of this consumerism-oriented view are luxury cars, like Bentley or Lamborghini. In the case of luxury goods, the customer usually desires to possess the product. Concepts like car sharing are therefore difficult in the luxury segment.

Experts expect Gen Z to have customer requirements that include a very high level of personalization of the car. This does not include only external features like leather trim or other design features, but concentrates on digital features instead. Seamless integration of the digital environment of the customer when entering the car or when switching from one car to another is expected to be a must in the future. This personalization of user preferences should be available internationally via some kind of user profile.

Apart from that, it should be possible to book extra services or features for the car in a similar way that is already common for smartphones. Thus, concepts like e.g. a “premium mode” could be realized for car features.

It is difficult to predict whether Digital Natives will buy cars in the future. While some experts think it is the biggest challenge to find new business models, others state that there will always be customers for whom ownership of the car is the only option.

Experts agree that German OEMs are not yet fully prepared to fulfil these customer requirements. The main reason for this is that the development cycles of the OEMs are still very long, especially in comparison with products from the field of information technology. It will be the greatest challenge to keep up with the integration of the short-lived digital world.
Furthermore, the traditional decision-making structures at the moment do not provide for enough flexibility to take short-term action and assure quick reactions to changes in the consumer market. These decision-making structures rely on controlling that is fully based on the selling on cars instead of more flexible business models that are yet to be developed.

5.4 Summary and explanations

The results from the survey confirm previous findings regarding the modal mix, i.e. the majority of Gen Z goes on foot, by bike or uses public transport and the main reasons for travelling are organization of leisure time, education, and shopping.

Most advertising is perceived on PC or Laptop, followed by mobile phone. The majority of Digital Natives prefers buying everything online agreed to the statement that a customer service must be available online by all means. Peer groups like friends and family are of high importance for the information process as well as for the purchase decision of Gen Z and are regarded as the most reliable source of information. They are, however, closely followed by customer reports and internet rankings for products. Nearly half of the participants report that they are more likely to buy a product when there are positive user reports about it on the social media. The majority of participants reported to have released own product ratings or field reports online or could imagine doing so in the future. Better product details, online-rankings of the product and lower price were chosen as the three most important decisive criteria for purchase of a product.

How is it that user reports or product rankings became of such importance during the last years? It is suggested that review portals are accepted as the new form of word of mouth.[88] Besides, eight theoretical reasons for reading user reports can be identified[89,90]:

1. Minimization of risk in the purchase decision: In today's information overflow it becomes harder and harder for customers to gain an overview on all products and services. Reading user reports are a possibility of gaining insights on negative product details and minimize the risk of taking a false decision.
2. Time saving: The customer saves time in the information process and in the comparison of product alternatives.
3. Social orientation: The customer can not only evaluate the product itself, but also the reputation of the product and thus the social significance of the product.
4. Gaining consumer experience: Customer reports can be a means of assessing information on how to properly handle or use a product in a certain situation.
5. Membership in a community: The customer might be membership or gain membership in a community and be interested in sharing his experience with other customers.
6. Gaining insights on product novelties: User reports inform abput product novelties and trends.
7. Avoidance of cognitive dissonance: User reports offer neutral experiences and rankings of a product. In doing so, they lessen the probability of

88 (Huber, 2011).
89 (Reichelt, 2013).
90 (Raake & Hilker, 2010).

disappointment of a product after the purchase and thus, cognitive dissonance.

8. Reward: There are user platforms that reward their users in a direct or indirect form for reading other user reports.

The car has lost its status symbol and only a minority of Gen Z agrees that cars have a good image. Although more than two thirds of the study participants have a car on their own or can use one within their household, only few agree to the statement that you need a car of your own nowadays. Surprisingly, even half of the Digital Natives strongly disagree or disagree on the statement that cars are important for their everyday mobility. Accordingly, nearly one third of interviewees think it is unlikely or very unlikely that they buy a car for themselves in the future.

Cost-performance ratio, safety and eco-friendliness were ranked the most important criteria for car purchase while multimedia/connectivity functions were surprisingly ranked as the least important criterion, followed by brand image and comfortable entrance. Eco-friendliness, hyper customization, and self-driving are the most desired features of future cars. Gen Z confirms a shift of the phases of the customer buying process as proposed by Boersma, i.e. the most suitable car for their needs is chosen first while the brand of the product results simply from this selection

In contrast to previous studies, the random sample shows reluctance regarding the purchase of high pricing products, i.e. also cars. Only a minority can imagine buying a car online without visiting a licensed dealership. How can this be explained? The topic of price reduction plays an important part in the topic of online-purchase. Usually, online-purchase of a car comes with huge price reduction. This is an important criterion for the customer to take the risk of online purchase. As shown in chapter 2 (page 48), the willingness to buy a car online increases significantly when linked to price reduction. A price reduction of 12% leads to 16% of customers willing to buy online, while when linked to only 2% of price reduction, the share decreases to 1% of customers only.
This indicates that price reduction is the decisive incentive for online purchase. During the current survey, this kind of incentive was not suggested in the question of online purchase. Instead, the fundamental readiness to purchase expensive items online was investigated.

Moreover, the Google New Car Buyer Survey 2015 reports that on average, 1.3 test drives are performed before a car is purchased. It is possible that the licensed dealer in this case only serves as a source of information, but not as the actual point of sale. If a test drive is performed at a dealership but the car is subsequently bought online, rising numbers of online purchase would be registered at the expense of licensed dealerships. In this case, the customer gets the best of both worlds: Security of his decision through test driving the car at the dealership and huge price-reductions through online purchase. Furthermore, a cheaper online offer can serve as important argument in the negotiation with the licensed dealership.

6. Recommendations for actions

Based on the previous findings, the following chapter aims at giving some recommendations for actions for OEMs to win Gen Z as future customers. Two main areas can be identified in which OEMs are advised to introduce changes; Firstly, the product itself, secondly the area of customer engagement and brand advertising.

The future will be characterized by urban megacities, most of them emerging in Asia and South America. Problems like traffic jams, air pollution, and limitation of expensive parking space will worsen and ask for locally optimized solutions. Bans on motorized traffic in densely populated areas and a simultaneous increase of the importance of individual mobility are on the rise. Europe and US will also experience further urbanization and economic growth. Growing incomes will lead to an enlargement of the middle class. Not only will this larger middle-class have more market power, but it will comprise most likely even more educated customers than today.

6.1 Sustainability as a decisive criterion for car purchase

As shown in chapter four, the most important decisive criteria for Gen Z when buying a car as identified during the study is eco-friendliness. This is surely also a phenomenon of socialization of Gen Z that took place during a period in which there was an increased focus on environmental issues.
More and more rigid regulations are decreed worldwide that force OEMs to invest in environmental friendly technologies and innovations. These include hybrid technologies as well as electric powertrains and – more recently – fuel cell technology. Moreover, OEMs experiment with natural materials as components for their vehicle interior and market their efforts to assure the sustainability of production and product accordingly.
Customers of the future will be sensitive to all there is to know about a product, including ecological footprint, production techniques, and also the people behind the product. The consumer will decide if this information fits his lifestyle and attitudes. Sustainability will therefore become a major competitive factor when trying to convince Gen Z of a certain product.

While OEMs are surely on the right track in this field, it seems that they are well advised to double their efforts on this topic. In May 2015, Toyota released the Mirai in Germany, a fuel cell powered sedan. Considering that e.g. the VW concern is researching on the fuel cell innovation since 1996 and has not yet come up with a model on the market, it becomes clear that German OEMs act too conservatively regarding innovative power trains.

Apart from that, the end of life cycle of the product becomes more and more important, e.g. in the case of batteries. There is a stronger request on manufacturers to provide feasible realization strategies for the end of the product life cycle. These realization strategies can be regarded as a feature not of the actual product, but of parts of the product and this leads to further marketable content.

6.2 Seamless integration of the digital milieu of the customer

In the future, the physical matter of a product will lose importance compared to software that will play a crucial role. Surprisingly, the topic multimedia and connectivity features was ranked one of the least important decisive criteria by the Digital Natives when it comes to buying a vehicle for their own. It is, however, questionable if this outcome is really based on a low priority of the topic. It seems more likely that for Gen Z, ubiquitous availability of the internet and it's features is a matter of course which does not need special attention or request from the customer's side.

The expectation of premium consumers regarding technological features in the future will be even higher than today. Therefore, the seamless integration of the whole digital environment of the customer into the car is a must-have integration for the future. This comprises not only the availability of mobile phone contents but extends to display, handling and integration of different accounts, cloud data, and all kinds of personalized digital content. This desire for hyper customization is also reflected in the second most desired feature of the car of the future, i.e. "everything should be configurable as I need it".

Personalization of the car in the future is less based on exterior factors like design, color or hardware functionality, but becomes a highly private matter that will include sensitive area of data security and data privacy. Not only does the car collect GPS data from navigation usage, but also various other data, simply by integration of features like messenger, email, apps etc. As a consequence, beside the seamless integration of the digital environment of the Digital Native, the assurance of data integrity and a strong engagement in the whole sector of ethics of data use is a mandatory future car feature in itself.

6.3 The car as a space of experience and retreat

Living in and around densely populated megacities will lead to longer travelling times through the city traffic. Megacities will in the long run most likely be perceived as crowded and stressful. Immaterial assets like calm and especially time itself will therefore become of greater value and importance. The slow moving traffic in the cities and the innovation of self-driving cars require new mobility solutions on the one hand and open up new possibilities on the other. The car of the future must provide for a flexible environment that can fulfil the needs of different customers as well as adapt to different situations or modes.

Firstly, the car will become a space of retreat for the driver. When no longer forced to fully focus on the process of driving, the customer can relax and enjoy moments of rest. Interior features of the car could support this, like e.g. optimally personalized ambient light, moveable seats including massage functions, guided meditation via the audio system and also the creation of scents inside the car is possible, even with today’s technology.

Secondly, a car can very well act at different modes, e.g. an Office Mode in the car could enable the customer to start working in the car while still on the way to work. Special modes for children are possible, e.g. an education mode or child entertainment. The automatic recognition of different customers can be realized through voice detection – among other technologies – and enable optimal personalization of the interior of the car as soon as a new passenger enters the car.

6.4 Adapting the automotive business model

In the future, customers will not always decide to own a product. While the request for possessing a certain luxury product may certainly prevail, the situation is quite different when it comes to mass customization products. The former automotive customer was used to buying and thus possessing the product, the Digital Native customer is merely a consumer of the product, like e.g. in the field of music consumption. It is no longer necessary to buy the record itself, but rather the right of use and enjoyment. Concepts like sharing, renting or hiring a service become more and more common as trends like food sharing and car sharing already show. The automotive business in general will have to adapt to being more agile and offer more flexibility to the consumer.

Technology and data are intertwined with almost everything nowadays. This increasing importance of customer's data and the customer's changing expectations towards connectivity leads to new strategies of value creation on the OEM side. The transfer of ICT strategies to the field of production is already realized in projects like Industry 4.0 and efforts for reaching operational excellence, etc. Yet, the integration of ICT strategies is not extended to the automotive business model to a similar extend.

ICT companies like Apple and Google have been partners for the automotive industry for years now, mainly in the area of infotainment. More recently, they act in the role of a competitor, e.g. with the self-driving Google car. It can be questioned, however, if these ICT companies are really planning to enter the automotive market as OEMs. It is more likely that these "field studies" are enablers for future business models and serve as a basis for evaluating data collecting strategies as well as analyzing future modes of cooperation with OEMs as system suppliers.

In ten years, the major part of cars will be online, and also the communication between the cars will increase significantly. This will produce an unimaginable amount of valuable data that can be the basis for new business models. In addition, the seamless integration of the digital environment of the customer will gather the "classical" customer data that is risen in the sectors of telecommunication, app usage, and online shopping today.

If the customer is willing to share this data, it will enable innovative new business models through cross-industry cooperation. Therefore, incentives must be offered to the customer to enhance his willingness of sharing the data with the OEM. These incentives could for example include price reductions or special premium services.

New business models should rather be based on the principles of the ICT business than on the classical car purchase of the past and present. OEMs must focus on creating more flexible scenarios of use of their products. This includes booking of extra services or features for the car in a similar way that is already common for smartphones.

6.5 Customer engagement and brand positioning

Not only the product or business model itself, but also the way we shop for cars has to change. Flexibility, convenience, service and the important topic of shopping experience will shape the future of car retail. Flexible logistics and delivery especially in rural areas are a must.

In the customer buying process as well as in the customer journey towards it, "channel hopping" becomes more and more common. This means that the customer or consumer uses different shopping or communication channels throughout the process, either in parallel or in sequential order. A product can for example be found or compared to other products online, but afterwards be bought in a shop. Alternatively, the customer receives a product he purchased online and wants to exchange it in a shop in his hometown. Especially Gen Z is already nowadays used to the parallel use of portable devices in addition to using other media in parallel. It is therefore important to optimally integrate and manage these different channels to guarantee optimized customer service.

Besides, the customer of the future will experience an information overload through data. It is important to be able to navigate the numerous available choices. Apart from the above mentioned user reports and online product rankings, smart suggestions systems based on neural networks are on the rise. They adapt to our personal filters, as can for example already be seen in platforms like Amazon. The relevance of brands will most likely change in this regard, since they can also be able to provide orientation. It is important to position the OEMs not only as a supplier of hardware, but to also install the strong brand image of a service provider. In doing so, brands can take a leading role in the shaping of future customer behavior and instill a demand for their products.

The audience becomes more and more sophisticated. Brands have to adapt by striving to provide the customer by a sense of meaning beyond the mere possession of a product. For the generation of Digital Natives, experiences become more important than the matter of a product. This includes also the shopping experience when buying a car. Audi already entered this service strategy named "Audi City". For this purpose, six adventure areas have been built in the metropolises Berlin, London, Paris, Istanbul, Moscow, and Peking. These centers are spaces of experience where cars can be configured and inspected in life-size on huge displays. It is part of the concept that the digital technology enables a direct interaction between the customer and the brand in real time. The Audi City is only a space of enjoyment, no purchasing contracts can be closed. If the customer decides he had configured a suitable car, he can get an Identification Code for this specific configuration. When visiting a licensed Audi dealer, he can access the exact configuration via the Identification Code. The centers are also event locations for public viewings, fashion shows, readings or the like.

7. Summary and Conclusions

The intense use of the internet with a special focus on mobile devices is the most striking characteristic that sets the Digital Natives apart from previous generations. This behavior is reflected in the customer buying process of Gen Z. Although the majority of customers nowadays use the internet during the information phase and evaluation of alternatives, the intensity and parallelism of use is unique in Gen Z.

The transformation of the car from a status symbol towards a mere means of transportation in combination with the high cost of ownership, and the difficult parking situation in urban areas leads to a decline of attractiveness of car ownership in Gen Z.

The future trends of further urbanization and economic growth will lead to a stronger middle-class comprising more educated customers. A shift in core values will make sustainability a major decisive factor for car purchase. The customer's real and digital environments will be fully intertwined in the future and besides the actual matter of a product, digital contents will increase in importance. The seamless integration of the digital environment of the customer is therefore a must-have feature for the car of the future. Immaterial assets like time, but also experiences in general are of great value and importance for Gen Z. As a consequence, cars will have to transform to a space of experience and retreat. Furthermore, an entertaining unique shopping experience must be offered to the customer of the future.

Since Gen Z will most likely be a consumer of goods and services instead of the owner of a product, the automotive business model must be transformed on the basis of ICT strategies. New ways of customer engagement and brand positioning will comprise optimal channel integration, an enhancement of the OEM brand image as a service provider.

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Appendix

A. Questionnaire

Wie denken Digital Natives über Mobilität?

Die Umfrage wird anonym ausgewertet.
Selbstverständlich werden all Deine Daten streng vertraulich behandelt und nicht an Dritte weitergegeben.

* Erforderlich

1. **Ich bin** *
Markieren Sie nur ein Oval.

- männlich
- weiblich

2. **In welchem Jahr bist Du geboren?** *
Markieren Sie nur ein Oval.

- 1990
- 1991
- 1992
- 1993
- 1994
- 1995
- 1996
- 1997
- 1998
- 1999
- 2000
- 2001
- 2002
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012

3. **Ich wohne** *
Markieren Sie nur ein Oval.

- alleine.
- bei meinen Eltern/meiner Familie.
- unter der Woche alleine, am Wochenende bin ich oft daheim bei meinen Eltern/meiner Familie.
- in einer WG

4. **Wie hoch ist Dein monatliches Nettoeinkommen? (Diese Angabe ist freiwillig)**
Markieren Sie nur ein Oval.

- unter 200€
- 200€ bis unter 450€
- 450€ bis unter 650€
- 650€ bis unter 900€
- 900€ bis unter 1200€
- 1200 bis unter 1500€
- 1500€ bis unter 1800€
- 1800€ bis unter 2100€
- über 2100€

5. **Wie ist Deine Postleitzahl (Freiwillige Angabe)**

____

6. **Ich habe einen Führerschein (Hier kannst Du mehrere Antworten ankreuzen):** *
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Ja
- [ ] Nein, ich bin noch zu jung.
- [ ] Nein, ich habe auch nicht vor den Führerschein zu machen.
- [ ] Nein, ich ich brauche keinen Führerschein.
- [ ] Nein, ich finde der Führerschein ist zu teuer.
- [ ] Nein, aber ich habe vor den Führerschein zu machen.
- [ ] Nein, ich verzichte zum Schutz der Umwelt auf den Führerschein

7. **Wie oft bist Du außerhalb von zuhause unterwegs?**
Markieren Sie nur ein Oval.

- mehrmals täglich
- täglich
- mehrmals wöchentlich
- ca einmal pro Woche
- seltener als einmal pro Woche

8. **Ich bin meistens draußen unterwegs um folgende Dinge zu erledigen (Hier kannst Du mehrere Antworten ankreuzen):**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Schule/Ausbildungsstätte
- [ ] Arbeit/dienstlich
- [ ] Freizeit
- [ ] Einkaufen
- [ ] Private Erledigungen
- [ ] Ich begleite jemanden
- [ ] Sonstiges: ______________________

9. **Wenn Du alle Deine Wegstrecken zusammenzählst, wie lange bist Du dann durchschnittlich jeden Tag unterwegs? (Hier zählen nur die Wegstrecken, nicht die Zeit, die Du irgendwo verbringst.)**
Markieren Sie nur ein Oval.

- ◯ ca 30 Minuten
- ◯ ca 1 Stunde
- ◯ ca 1 Stunde und 30 Minuten
- ◯ ca 2 Stunden
- ◯ ca 2 Stunden und 30 Minuten
- ◯ ca 3 Stunden
- ◯ ca 3 Stunden und 30 Minuten
- ◯ ca 4 Stunden oder mehr

10. **Wenn Du alle Deine Wegstrecken zusammenzählst, wie viele Kilometer bist Du dann ungefähr jeden Tag unterwegs?**
Markieren Sie nur ein Oval.

- ◯ weniger als 5 km
- ◯ 5-10 km
- ◯ 10-15 km
- ◯ 15-20 km
- ◯ 20-30 km
- ◯ 30-40 km
- ◯ 40-50 km
- ◯ 50-60 km
- ◯ 60-80 km
- ◯ 80-100 km
- ◯ Mehr als 100 km

11. **Mit welchen Verkehrsmitteln bist Du normalerweise unterwegs?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] zu Fuß
- [ ] Fahrrad
- [ ] Moped/Motorrad
- [ ] Car-Sharing
- [ ] Öffentliche Verkehrsmittel
- [ ] Eigenes Auto
- [ ] Auto der Eltern (Ich bin Mitfahrer)
- [ ] Auto der Eltern (Ich fahre selbst)
- [ ] Sonstiges: ____________________

12. **Welches der folgenden Dinge verwendest Du regelmäßig (mehrmals pro Woche)?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Handy
- [ ] Tablet
- [ ] Laptop
- [ ] PC zuhause
- [ ] keins davon
- [ ] Sonstiges: ____________________

13. **Bitte bewerte die Aussage: "Ich bin schon einmal über Werbung auf ein Produkt aufmerksam geworden und habe es dann gekauft."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu

14. **Bitte bewerte die Aussage: "Ich habe schon einmal ein Produkt gekauft weil es eine bestimmte Aktion gab (z.B. Preisreduzierung, Deal des Tages etc).**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu

15. **Auf welchem Medium nimmst Du die meiste Werbung wahr?**
Markieren Sie nur ein Oval.

- Fernseher
- Radio
- Handy
- Computer/Laptop
- Zeitung/Zeitschriften
- Sonstiges: ______________________________

16. **Hast Du schon einmal bewusst Werbeclips angesehen, z.B. witzige Werbung auf Youtube?**
Markieren Sie nur ein Oval.

- Ja
- Nein

17. **Wie informierst Du Dich über ein Produkt, das Du kaufen möchtest?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Ich informiere mich bei persönlichen Kontakte (Familie/Freunde/Bekannte etc)
- [ ] Ich frage den Verkäufer im Laden.
- [ ] Ich informiere mich im Internet auf der Website des Herstellers.
- [ ] Ich gehe in den Laden und teste das Produkt vor dem Kauf.
- [ ] Ich bekomme Informationen über Radio- und Fernsehwerbung
- [ ] Ich informiere mich über Social Media (Youtube, Snapchat, Instagram etc).
- [ ] Ich suche im Internet nach Erfahrungsberichten und Bewertungen.
- [ ] Sonstiges: ______________________________

18. **Was glaubst Du ist die zuverlässigeste Infromationsquelle?**
Markieren Sie nur ein Oval.

- Persönliche Kontakte (Familie/Freunde/Bekannte etc)
- Verkäufer im Laden
- Informationen auf der Website des Herstellers
- Produkt vor dem Kauf im Laden testen
- Informationen über Radio- und Fernsehwerbung
- Social Media (Youtube, Snapchat, Instagram etc)
- Erfahrungsberichte und Bewertungen
- Sonstiges: ______________________________

19. **Wieviele verschiedene Marken vergleichst Du wenn Du ein bestimmtes Produkt kaufen möchtest?**
Markieren Sie nur ein Oval.

- Ich vergleiche gar nicht.
- 2-3
- 3-5
- 5-7
- 7-10
- mehr als 10

20. **Kannst Du Dir vorstellen ein Produkt zu kaufen, obwohl Du im Internet keine Informationen dazu findest?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Nein, das ist sehr unwahrscheinlich.						Ja, das ist sehr wahrscheinlich.

21. **Würdest Du ein Produkt eher kaufen wenn es in den Social Media positive Erfahrungsberichte darüber gibt?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Nein, das ist sehr unwahrscheinlich.						Ja, das ist sehr wahrscheinlich.

22. **Wie denkst Du über die Aussage: "Ich kaufe am liebsten alles online."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu.						Ich stimme voll und ganz zu.

23. **Wenn für Dich verschiedene Produkte zum Kauf infrage kommen, welches sind die drei wichtigsten Kriterien, wonach Du Dich für ein Produkt entscheidest?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] der günstigere Preis
- [ ] die bessere Marke
- [ ] das bessere Design
- [ ] die besseren Produktdetails (z.B. technische Details)
- [ ] das Erscheinungsdatum des Produkts (Du kaufst das neueste Produkt)
- [ ] die Empfehlungen von Freunden
- [ ] die Online-Bewertungen für das Produkt
- [ ] die Online-Präsenz des Herstellers
- [ ] die Werbung
- [ ] Sonstiges: ______________________

24. **Und welches ist DAS WICHTIGSTE Kriterium, wonach Du Dich für ein Produkt entscheidest, wenn mehrere Produkte für Dich infrage kommen?**
Markieren Sie nur ein Oval.

- ( ) der günstigere Preis
- ( ) die bessere Marke
- ( ) das bessere Design
- ( ) die besseren Produktdetails (z.B. technische Details)
- ( ) das Erscheinungsdatum des Produkts (Du kaufst das neueste Produkt)
- ( ) die Empfehlungen von Freunden
- ( ) die Online-Bewertungen für das Produkt
- ( ) die Online-Präsenz des Herstellers
- ( ) die Werbung
- ( ) Sonstiges: ______________________

25. **Wie denkst Du über die Aussage: "Wenn die Online-Präsenz des Herstellers mir NICHT gefällt, dann kaufe ich das Produkt auch nicht."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Trifft überhaupt nicht zu.	( )	( )	( )	( )	( )	Trifft voll und ganz zu.

26. **Wie denkst Du über die Aussage: "Ich kann mir vorstellen ein teures Produkt (Preis über 10.000€) online zu kaufen ohne einen persönlichen Ansprechpartner zu haben."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Trifft überhaupt nicht zu.	( )	( )	( )	( )	( )	Trifft voll und ganz zu.

27. **Trifft die folgende Aussage auf Dich zu? "Ich entscheide mich erst für eine bestimmte Marke und wähle dann das für mich passende Produkt dieser Marke aus."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Trifft voll und ganz zu	◯	◯	◯	◯	◯	Trifft überhaupt nicht zu

28. **Trifft die folgende Aussage auf Dich zu? "Ich suche zuerst nach dem geeignetsten Produkt für mich und die Marke ergbt sich dann automatisch."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Trifft voll und ganz zu	◯	◯	◯	◯	◯	Trifft überhaupt nicht zu

29. **Hast Du schon mal eigene Bewertungen oder Erfahrungsberichte online abgegeben (Amazon, YouTube etc)?**
Markieren Sie nur ein Oval.

- ◯ Ja, das mache ich regelmäßig.
- ◯ Ja, hab ich schon mal gemacht.
- ◯ Nein, aber ich kann mir vorstellen irgendwann in Zukunft eine Bewertung abzugeben.
- ◯ Nein, sowas mache ich grundsätzlich nicht.
- ◯ Nein, die meisten Bewertungen sind sowieso fake.

30. **Wie denkst Du über die Aussage: "Bei Problemen muss ein Kundenservice auf jeden Fall online erreichbar sein."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu.	◯	◯	◯	◯	◯	Ich stimme voll und ganz zu.

31. **Hast Du Deinen Freunden/Familie schon mal ein Produkt empfohlen, dass Du selbst nicht gekauft hast?**
Markieren Sie nur ein Oval.

- ◯ Ja
- ◯ Nein

32. **Stell Dir vor Du bist mit einem gekauften Produkt unzufrieden, wie wahrscheinlich ist es, dass Du Dich beim Hersteller offiziell beschwerst?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Sehr unwarscheinlich	◯	◯	◯	◯	◯	Sehr wahrscheinlich

33. **Stell Dir vor Du bist mit einem gekauften Produkt unzufrieden, wie wahrscheinlich ist es, dass Du eine schlechte Produktbewertung online abgibst oder Deine negative Erfahrung über Social Media teilst?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Sehr unwarscheinlich	⬭	⬭	⬭	⬭	⬭	Sehr warscheinlich

34. **Stell Dir vor Du bist mit einem gekauften Produkt sehr zufrieden, wie wahrscheinlich ist es, dass Du eine gute Produktbewertung online abgibst oder Deine positive Erfahrung über Social Media teilst?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Sehr unwarscheinlich	⬭	⬭	⬭	⬭	⬭	Sehr warscheinlich

35. **Hast Du ein eigenes Auto oder gibt es in Deinem Haushalt ein Auto das Du mitbenutzen kannst?**
Markieren Sie nur ein Oval.

- ⬭ Ja
- ⬭ Nein

36. **Wie denkst Du über die Aussage: "Heutzutage braucht man ein eigenes Auto."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu

37. **Wie denkst Du über die Aussage: "Ein Auto ist ein Prestige-Objekt?"**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu

38. **Hast Du in der Vergangenheit schon einmal Car-Sharing genutzt oder nutzt Du Car-Sharing regelmäßig?**
Markieren Sie nur ein Oval.

- ⬭ Ja, mache ich regelmäßig.
- ⬭ Ja, ab und zu.
- ⬭ Nein, das kenne ich gar nicht.
- ⬭ Nein, könnte ich mir aber für die Zukunft vorstellen.
- ⬭ Nein, davon halte ich gar nichts.
- ⬭ Sonstiges: ____________________

39. **Für wie wahrscheinlich hältst Du es, das Du in der Zukunft Car-Sharing nutzt?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Halte ich für sehr unwahrscheinlich	⬭	⬭	⬭	⬭	⬭	Halte ich für sehr wahrscheinlich

40. **Wie denkst Du über die Aussage: "In der Zukunft werde ich mir ein Auto kaufen."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Halte ich für sehr unwahrscheinlich	⬭	⬭	⬭	⬭	⬭	Halte ich für sehr wahrscheinlich

41. **Wie denkst Du über die Aussage: "Autos sind umweltfreundlich."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu.	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu.

42. **Wie denkst Du über die Aussage: "Autos sind für meine alltägliche Mobilität wichtig."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu.	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu.

43. **Wie denkst Du über die Aussage: "Autos haben ein gutes Image."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu.	⬭	⬭	⬭	⬭	⬭	Ich stimme voll und ganz zu.

44. **Welches sind für Dich die drei WICHTIGSTEN Entscheidungskriteien wenn Du daran denkst ein Auto zu kaufen?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Sicherheit
- [ ] Zuverlässigkeit
- [ ] Motorleistung
- [ ] Preis-Leistungs-Verhältnis
- [ ] Geringer Sprit-Verbrauch
- [ ] Einfache Bedienung
- [ ] Gute Ausstattung
- [ ] Multimedia und Internetdienste
- [ ] Geringer Co2-Ausstoß
- [ ] Umweltfreundlichkeit
- [ ] Styling/Design
- [ ] Innovative Technologie
- [ ] Markenimage
- [ ] Bequemer Einstieg
- [ ] Familienfreundlichkeit/Geräumigkeit
- [ ] Erhöhte Sitzposition

45. **Welches sind für Dich die drei UNWICHTIGSTEN Entscheidungskriteien wenn Du daran denkst ein Auto zu kaufen?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Sicherheit
- [ ] Zuverlässigkeit
- [ ] Motorleistung
- [ ] Preis-Leistungs-Verhältnis
- [ ] Geringer Sprit-Verbrauch
- [ ] Einfache Bedienung
- [ ] Gute Ausstattung
- [ ] Multimedia und Internetdienste
- [ ] Geringer Co2-Ausstoß
- [ ] Umweltfreundlichkeit
- [ ] Styling/Design
- [ ] Innovative Technologie
- [ ] Markenimage
- [ ] Bequemer Einstieg
- [ ] Familienfreundlichkeit/Geräumigkeit
- [ ] Erhöhte Sitzposition

46. **Welches ist für Dich DAS wichtigste Entscheidungskriterium wenn Du daran denkst ein Auto zu kaufen?**
Markieren Sie nur ein Oval.

- Sicherheit
- Zuverlässigkeit
- Motorleistung
- Preis-Leistungs-Verhältnis
- Geringer Sprit-Verbrauch
- Einfache Bedienung
- Gute Ausstattung
- Multimedia und Internetdienste
- Geringer Co2-Ausstoß
- Umweltfreundlichkeit
- Styling/Design
- Innovative Technologie
- Markenimage
- Bequemer Einstieg
- Familienfreundlichkeit/Geräumigkeit
- Erhöhte Sitzposition

47. **Kannst Du Dir vorstellen ein Auto online zu kaufen ohne vorher zum Händler zu gehen?**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Kann ich mir überhaupt nicht vorstellen						Kann ich mir sehr gut vorstellen

48. **Wie sehr stimmst Du der folgenden Aussage zu: "Wenn ich ein Auto kaufe suche ich mir zuerst die Marke aus und entscheide mich dann für ein passendes Modell dieser Marke."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu						Ich stimme voll und ganz zu

49. **Wie sehr stimmst Du der folgenden Aussage zu: "Wenn ich ein Auto kaufe suche ich mir zuerst ein passendes Modell aus, die Marke ergibt sich dann automatisch."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu						Ich stimme voll und ganz zu

50. **Welche Features sollte Deiner Meinung nach ein Auto in der Zukunft haben?**
Wählen Sie alle zutreffenden Antworten aus.

- [ ] Es soll selbst fahren.
- [ ] Es soll umweltfreundlich sein.
- [ ] Es soll möglichst schnell fahren.
- [ ] Es sollte über eine App auf meinem Handy steuerbar sein.
- [ ] Es sollte möglich viele Multimedia- und Internetdienste anbeieten.
- [ ] Es soll möglichst leise sein.
- [ ] Es soll coolen Motor-Sound mitbringen.
- [ ] Es soll in vielen Farben erhältlich sein.
- [ ] Es soll billig sein.
- [ ] Es sollte ein modernes Design haben.
- [ ] Es soll alles so konfigurierbar sein, wie ich es brauche.
- [ ] Sonstiges: ____________________

51. **Welches Feature ist DAS wichtigste für Autos in der Zukunft?**
Markieren Sie nur ein Oval.

- ◯ Es soll selbst fahren.
- ◯ Es soll umweltfreundlich sein.
- ◯ Es soll möglichst schnell fahren.
- ◯ Es sollte über eine App auf meinem Handy steuerbar sein.
- ◯ Es sollte möglich viele Multimedia- und Internetdienste anbeieten.
- ◯ Es soll möglichst leise sein.
- ◯ Es soll coolen Motor-Sound mitbringen.
- ◯ Es soll in vielen Farben erhältlich sein.
- ◯ Es soll billig sein.
- ◯ Es sollte ein modernes Design haben.
- ◯ Es soll alles so konfigurierbar sein, wie ich es brauche.
- ◯ Sonstiges: ____________________

52. **Was denkst Du über folgende Aussage: "In Zukunft sollten Auto-Hersteller mehr flexible Programme für die Nutzung ihrer Produkte anbieten (z.B. zeitlich begrenzte Nutzung, Mieten, Car-Sharing etc)."**
Markieren Sie nur ein Oval.

	1	2	3	4	5	
Ich stimme überhaupt nicht zu	◯	◯	◯	◯	◯	Ich stimme voll und ganz zu

53. **Wie würdest Du am liebsten über Aktionen und Angebote von Auto-Herstellern informiert werden?**

Wählen Sie alle zutreffenden Antworten aus.

- [ ] Ferseh-/Radio-Werbung
- [ ] Pop-up Werbung und Banner auf dem Smartphone
- [ ] Online-Portal
- [ ] Anruf
- [ ] Infos direkt auf's Handy (WhatsApp, SMS, etc)
- [ ] Website des Herstellers
- [ ] Social Media
- [ ] Zeitung/Printmedien
- [ ] Sonstiges: ______________________

54. **Wenn Du ein Feature für's Auto neu erfinden könntest, was wäre das?**

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