



AUTOMOTIVE
MEDIAVENTIONS

AMV x JONATHAN TURPIN



AMV GEEFT JE KENNIS MEE

Bij Automotive MediaVentions geloven we dat kennis de sleutel is tot succes. Als dé businesspartner voor autobedrijven willen we jullie niet alleen ondersteunen, maar ook inspireren door relevante inzichten te delen die jullie verder helpen.

We hebben daarom Jonathan Turpin gevraagd om op het Nationaal Automotive Congres 2025 inzicht te geven in de veranderingen die in de occasionmarkt op ons afkomen richting 2030. Hoe speel je daar nu al op in? En misschien wel het belangrijkste: hoe kun je ervan profiteren?

Wij hopen dat zijn presentatie inspireert om toekomstgericht te denken en kansen te grijpen.

4 June 2025

Key trends in automotive retail: The next five years and beyond ... and how you can benefit



Jonathan Turpin (Principal, AIM Group)

Invited by:



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Jonathan Turpin
Principal, the AIM Group



Global business intelligence service

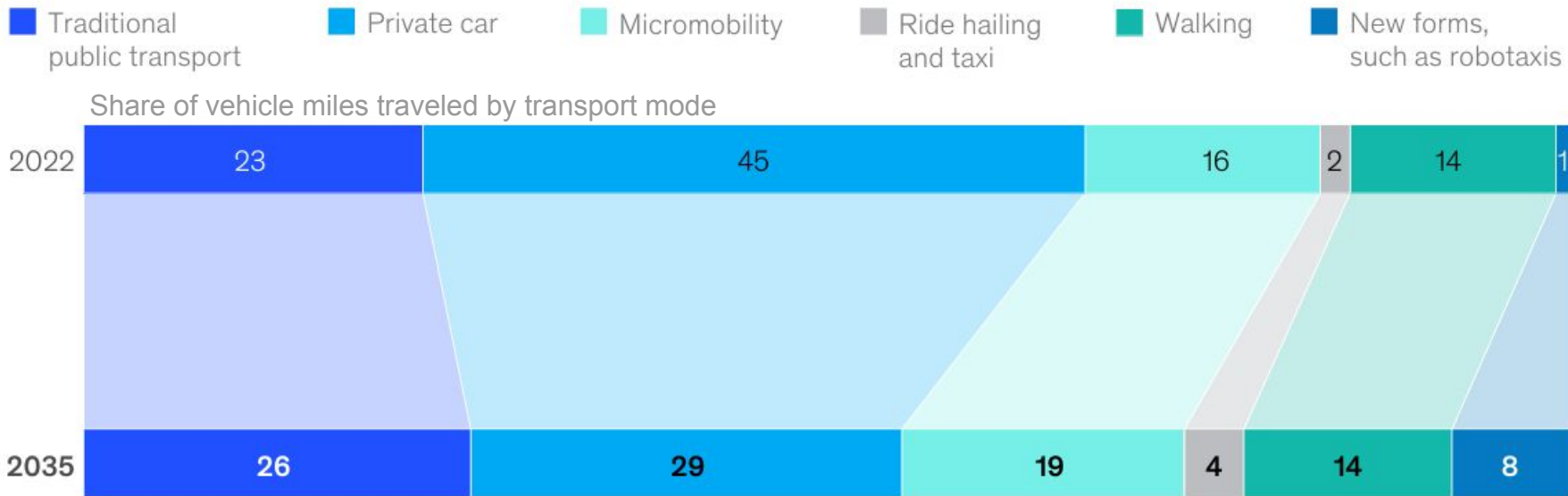
- News and analysis
- Conferences
- Consulting

Focus: Consumer marketplaces

- Automotive
- Real estate
- Recruitment
- General goods

- 1. Stability of the dealer model**
- 2. Impact: EVs, decreasing brand loyalty**
- 3. Forecast used-car sales growth**
- 4. E-commerce / omni-channel sales**
- 5. AI and increased digitization of auto sales**
- 6. Conclusions for dealerships**

Mobility split by mode of transportation, worldwide, %



Source: McKinsey Center for Future Mobility: [The Future of Mobility, April 2023](#). Note: Figures may not add to 100% due to rounding.

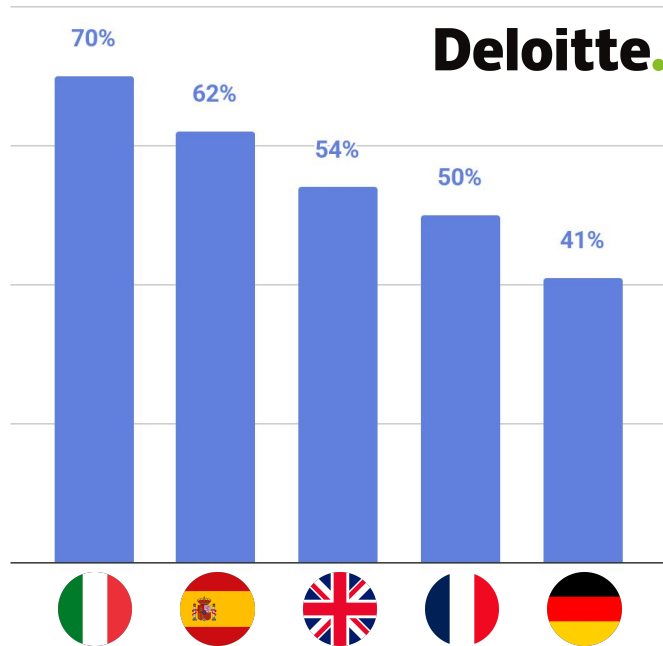
OEM agency model: Stalling



Source: AIM Group research and analysis.

Brand loyalty: Shredded

Willingness to switch to another brand for next car purchase (% , 2024)



Source: Deloitte [2025 Global Automotive Consumer Study](#), January 2025

- Car buyers need more hand-holding, and ...
- ... research more online before buying
- Increased customer acquisition costs for OEMs
- Multi-brand environments increasingly important for sales (also, pitching new vs. used)
- More multi-brand dealerships
- Stronger negotiating leverage for dealerships with OEMs, better value for car buyers
- Buyers looking to de-risk: more “usership,” less ownership

Dealers more critical to OEMs

Source: AIM Group research and analysis.

EVs, new brands = Even more trading uncertainty



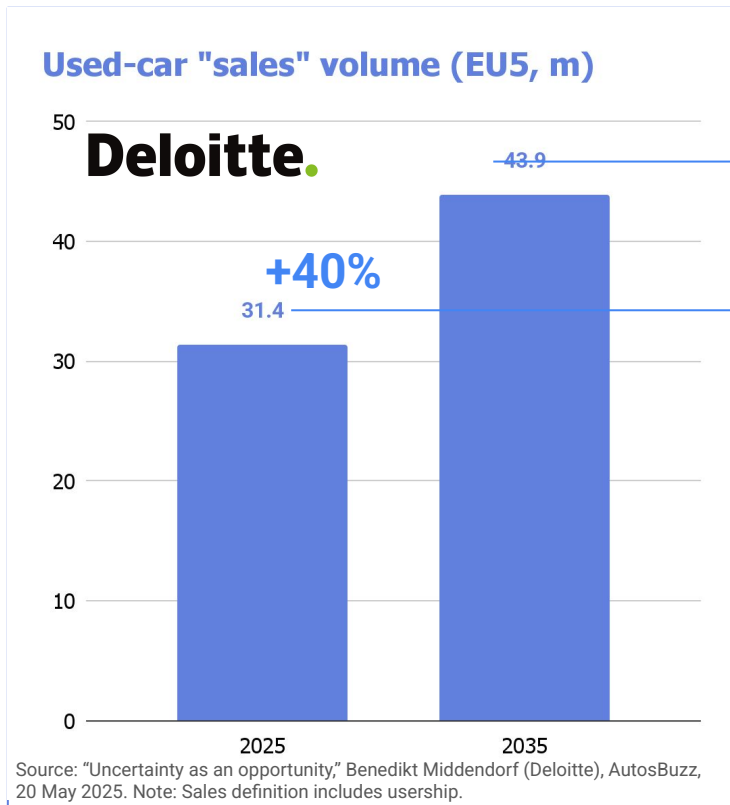
Purchase price parity:

2026-2028?

- Purchase prices of new EVs will soon match ICE vehicles. Parity will arrive even sooner in the used-car market
- EV switch self-fulfilling; limited need for regulation / subsidy of new cars; more support for smaller cars, used EVs?
- Car buyers will want a more frequent “technology refresh” with EVs. Lease durations will shorten relative to ICE cars
- Dealers will need to get to grips with yet more new brands / models flowing into the market
- Trading uncertainty will continue to increase – risks on pricing, demand, residuals, subsidies

**Managing trading uncertainty key:
Tools / data critical to managing sourcing / sales / risk**

Used-car 'sales' growth: Substantial over next 10 years?



- "Sales" here includes "usership" models
- Near term: EV risks, battery recycling legislation push buyers and OEMs towards usership. *(Less so in the The Netherlands due to financing regulation?)*
- Near term: Demand for used cars increases due to affordability issues with new cars
- Medium term: Consumers change cars more frequently:
 - Driven by technology upgrades
 - Facilitated by usership contracts
- Medium to long term: Battery technology stabilizes. Used-car life extends.

Source: AIM Group research and analysis.

Dealer trade-ins: Under threat

New brands,
reduced brand loyalty

Increased
'usership?'

Car wholesalers
cherry-picking cars
to sell b-to-c online



OEM ownership of
vehicle lifecycle

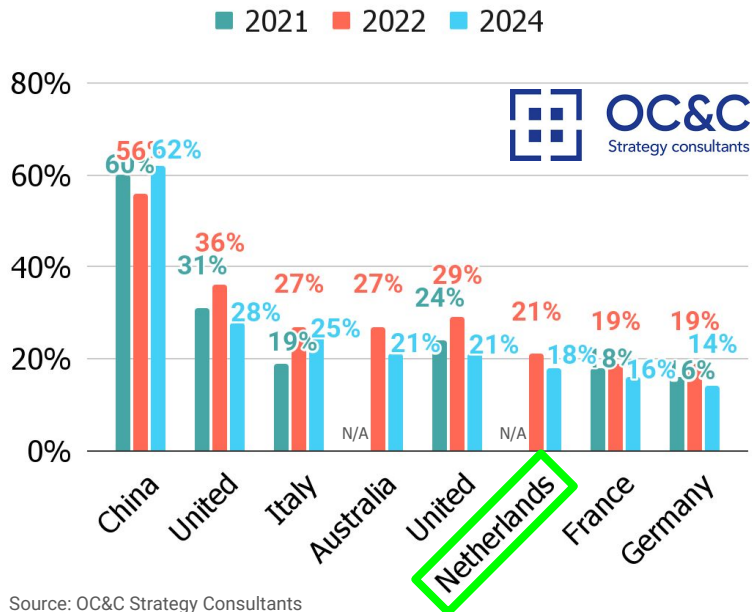
Car-buying services

Important to diversify car sourcing

Source: AIM Group research and analysis.

Consumer niche willing to 'click and collect'

% who agree / strongly agree they're happy to buy their next car on "click and collect"



Source: OC&C Strategy Consultants

Question: "To what extent would you agree with the following: I would be happy to purchase my next car on 'click and collect' or home delivery - without seeing it first."

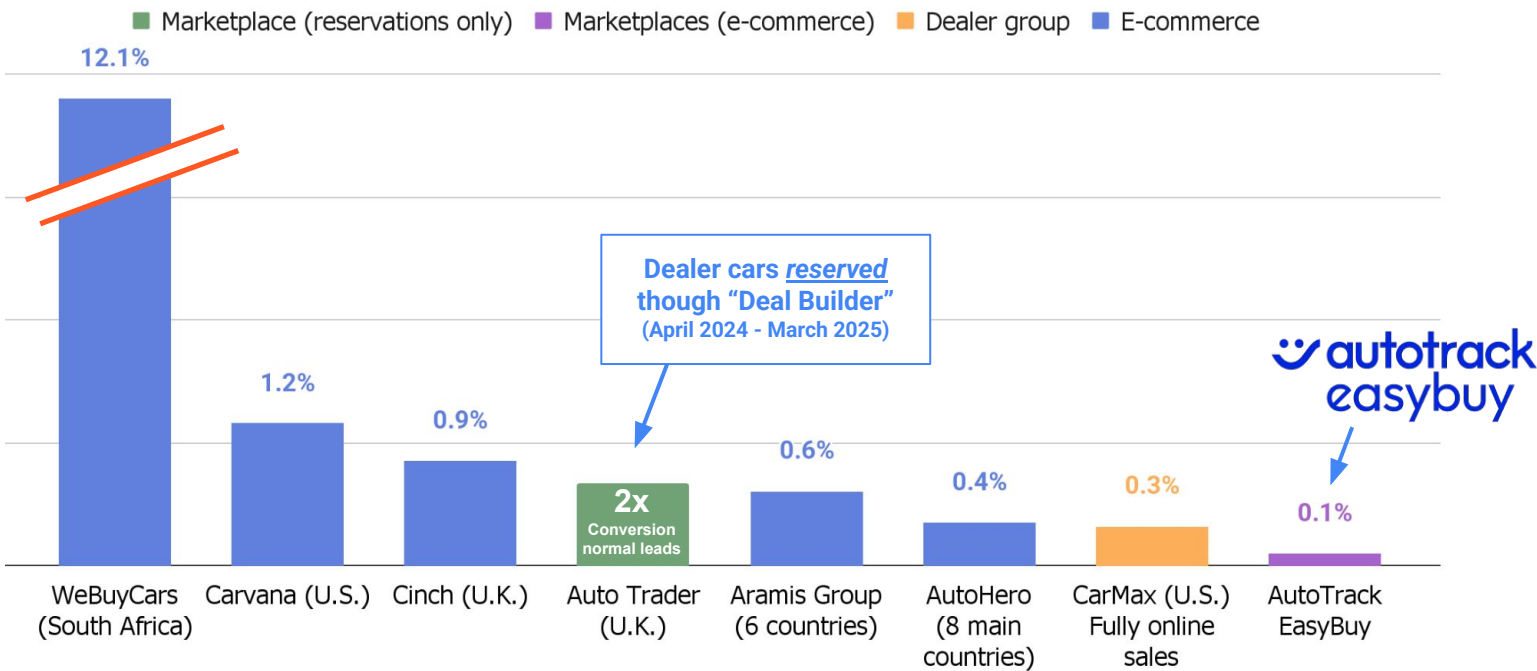
- A niche, but not necessarily a small one
- Note: 61% of drivers aged 25-44 may consider online car purchase (same OC&C study)
- Consideration levels will rise as consumer trust in online sales grows

Opportunities for dealers:
⇒ Omni-channel to capture niche, ...
... drive sales efficiency
⇒ Third-party to add sales at the margin

Source: AIM Group research and analysis.

Auto e-commerce developing slowly, but ...

Estimated penetration (% of used-car sales, 2024)



Source: Company reports and presentations, used-car sales data from many sources including national statistical databases, industry associations and friendly marketplaces, AIM Group research and analysis. Note: Aramis Group assessed on six countries: AT, BE, FR, IT, ES, UK. AutoHero assessed on eight core countries: AT, FR, DE, IT, NL, PL, ES, SW. 2023 used-car sales data applied where 2024 data not available.

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Amazon: Fourth foray into car sales more interesting



amazon Deliver to Washington 20002 Amazon Autos Search Amazon

EN Hello, sign in Account & Lists Returns & Orders Cart

All Amazon Haul Medical Care Saks Best Sellers Amazon Basics New Releases Music Registry Groceries Smart Home Gift Cards Today's Deals Prime Customer Service Memorial Day Sale

amazon autos BETA How it works Chat Saved cars


Prime member exclusive: Get \$1,750 in Amazon.com gift cards when you buy a new car! Join Prime - Terms apply.

Back to results

New 2025 Hyundai Elantra N Front Wheel Drive, I4 2 L, Manual

By HYUNDAI

Be the first to write a review



Buying options: Finance

Cash	Finance	Lease
\$34,260 ⁰⁰	\$552 ⁴⁷ /mo	\$437 ¹⁹ /mo

\$552⁴⁷/mo Vehicle price: \$34,260.00

\$1,000 down payment • 72 months • 6.08% APR
Est. excl. govt fees, taxes and \$951.00 in dealer fees on approved credit.

Estimate your monthly payment.

Total MSRP: \$36,260
View pricing and rebate details.

FREE pickup in 1-3 days
ALEXANDRIA HYUNDAI Dealer details

Sign in to begin order

Price clarity We show an upfront breakdown of all your costs so you're better informed.

Sold by ALEXANDRIA HYUNDAI
No feedback yet

Cancellation Your order can be canceled anytime before completing pickup at the dealership.

Returns Vehicle is non-returnable once pickup is completed. For exchanges, see Hyundai's 3 Day Worry-Free Exchange.

GEICO

Features and details Seller highlights

So far ...

- "Public beta"
 - Hyundai only
 - New cars, dealer-supplied
 - 68 cities now
 - **First month: 400 cars sold**
 - Reservation: \$500 refundable deposit, balance paid to dealer
 - 20 minutes to order; sign contract three hours later
 - Financing / leasing (via OEM)
 - Instant trade-in offer
 - Delivery or pickup
- **Extension into used cars planned**

Source: [Amazon.com](https://www.amazon.com), media reports, AIM Group research and analysis.

AI: Extensive re-engineering of dealership processes

Near term:
Copilots



Five-10 years:
Full replacement

Mainly human



Basic paperwork



Customer query handling, support

- ⇒ Customer inquiries
- ⇒ Car recommendation
 - ⇒ Lead-handling
 - ⇒ Customer care
- ⇒ Indirectly, much selling



Tool- / data-driven processes

- ⇒ Financing
- ⇒ Trade-in valuations
 - ⇒ Marketing
- ⇒ Car sourcing / inventory management / pricing



Car-handling activities

- ⇒ Test drives
- ⇒ Visual trade-in checks
 - ⇒ Vehicle preparation
- ⇒ Servicing (AI-assisted)
 - ⇒ Complaint resolution
- ⇒ Event-based marketing
 - ⇒ Soft on-site selling

Source: Images created by ChatGPT, AIM Group research and analysis.

Digital, AI: Some opportunities

**Illustrative
costs for
selling a
€22,000 car**



Total unit costs: €4,050

**ILLUSTRATIVE
DEALER**

Digital, AI: Some opportunities

**Illustrative
costs for
selling a
€22,000 car**

Reconditioning: €900
Warranty / CPO: €400
Floor plan interest: €250
Sales commission, F&I labor: €700
Advtg, marketing: €300
Administrative, overhead: €1,200
Property, D&A: €300
Operating profit: €450 (2%)

**45 days to 40 days
= €26 saved**

**+12.5% more
inventory to sell
= €56 operating profit**

**ILLUSTRATIVE
DEALER**

Digital, AI: Some opportunities

**Illustrative
costs for
selling a
€22,000 car**



Super-leads:

- Reservations
- Financing applications
- Trade-ins

AI “co-pilots:”

- Listing and image management
- Query and lead management
- Order management, contracting

Data-driven tools:

- Sourcing
- Pricing
- Trade-in management

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Marketplaces deepening their digital partnerships with dealers

The future: Deeper digital support for dealerships

Data-driven tools for effective sourcing / selling, ...

... including strong insight into new brands / models

AI tools: admin, marketing, query management

Better c-to-b approaches, diversion of c-to-c to dealers

High conversion, super-leads

E-commerce – for extra sales at the margin

The AIM Group

Global business intelligence service

- News and analysis
- Conferences
- Consulting

... providing information and advice on strategic and operational challenges and opportunities

Focus: Marketplaces and models that challenge them

- Automotive
- Real estate
- Recruitment
- Horizontals / general goods / recommerce
- Niche marketplaces
- Challengers: Tech, FinTech, e-commerce and transactions

Working at senior levels with:

- Marketplaces
- Classified companies
- Digital retailers
- Investors
- Vendors

More than 30 analysts, based across the globe:

- Africa
- Asia / India
- Australasia
- Europe
- Latin America
- Middle East
- North America

Get in touch!



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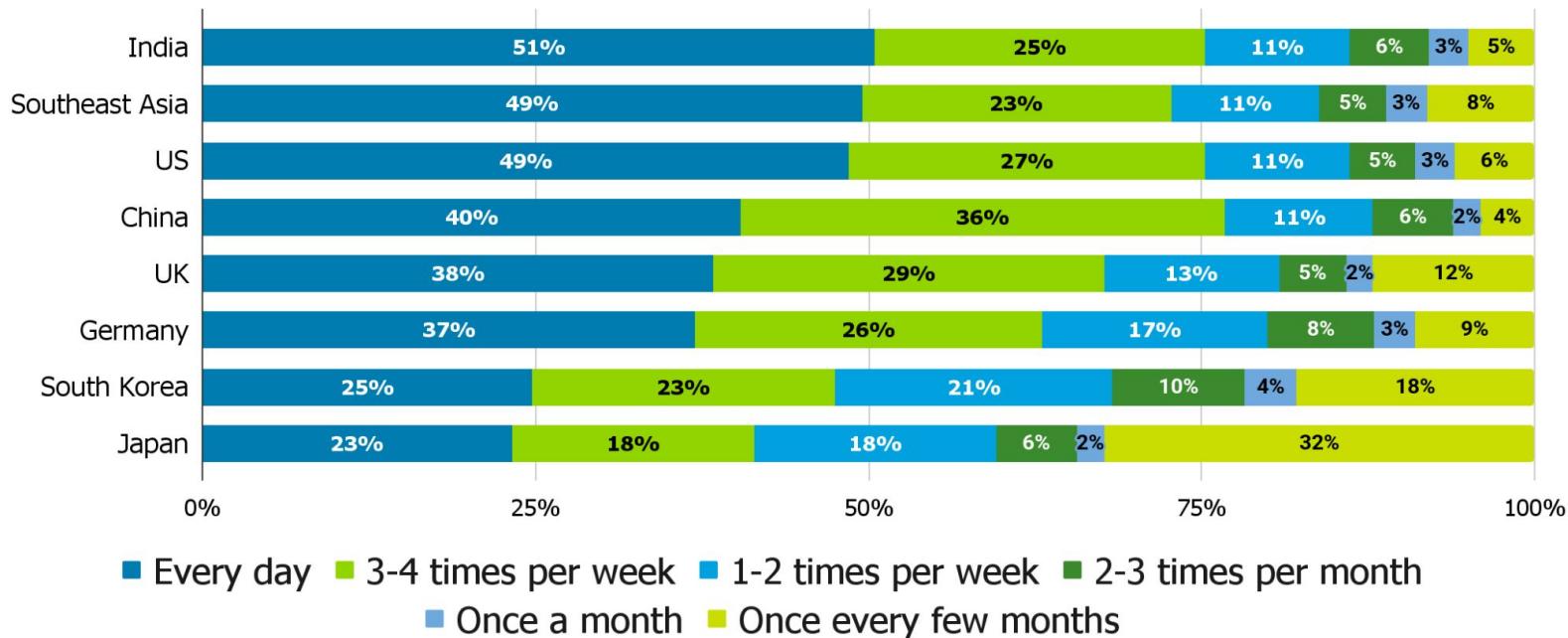
+44 (0) 7595 172228



Cathal Ó Murchú

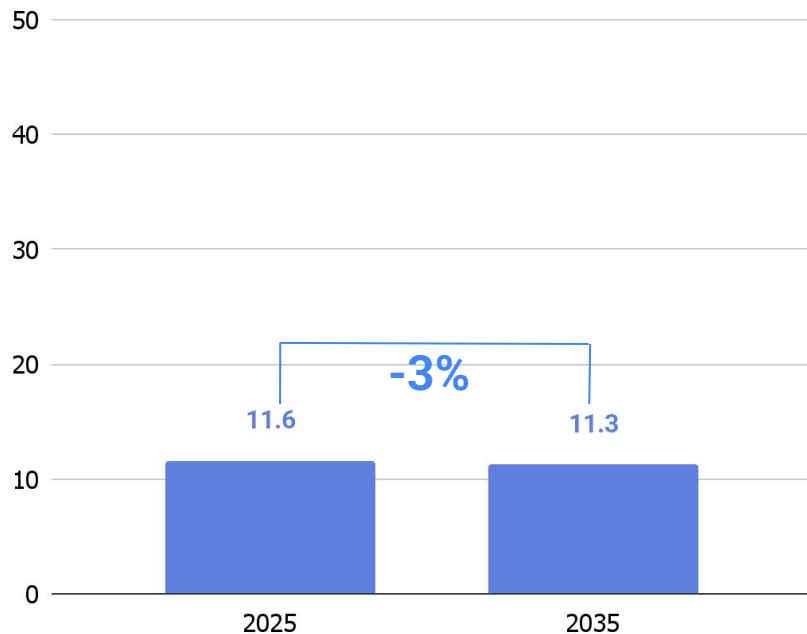
Analyst

Frequency of driving personal vehicle

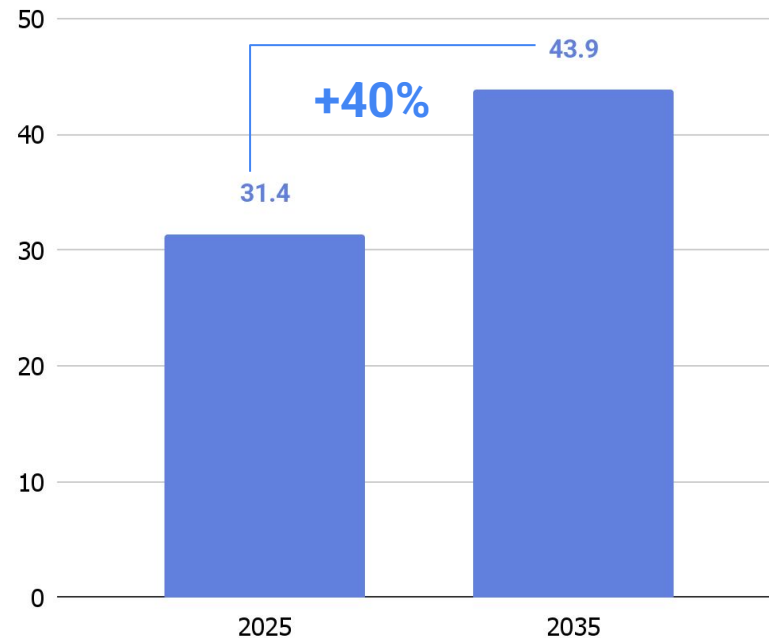


Source: Deloitte [2025 Global Automotive Consumer Study](#), January 2025

New cars (m)

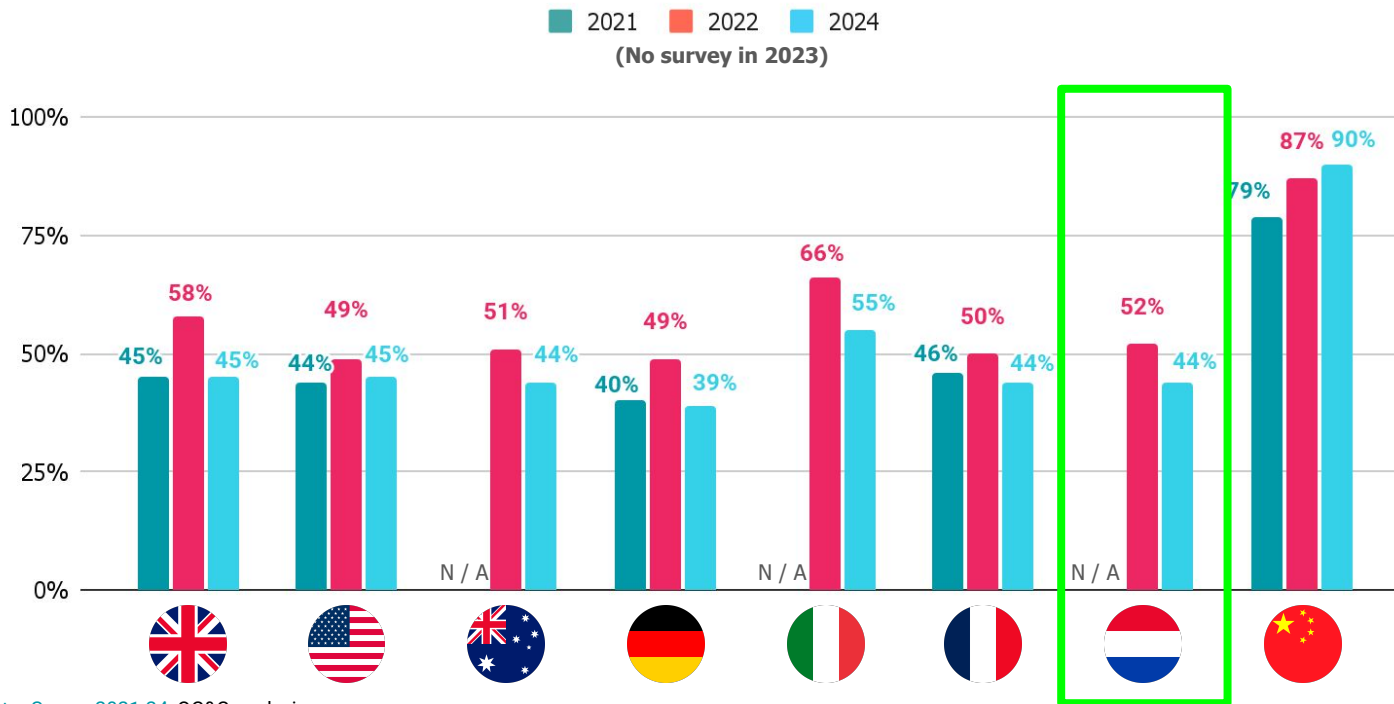


Used cars (m)



Source: "Uncertainty as an opportunity," Benedikt Middendorf (Deloitte), AutosBuzz, 20 May 2025
Note: Sales defined to include car leases and other forms of usage-based "ownership".

Consideration of fully electric vehicles on next purchase (%)



Source: [Speedometer Survey 2021-24](#), OC&C analysis.

Question: "When considering your next car, how likely are you to consider an electric / hybrid vehicle?" Respondents definitely buying an EV, likely to buy one, or considering to buy one.

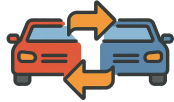
EVs trends already impacting car 'sales' / dealerships



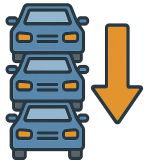
Increased frequency of used-car “resale?”



Dealer-preferred used-car brands and models in limited supply



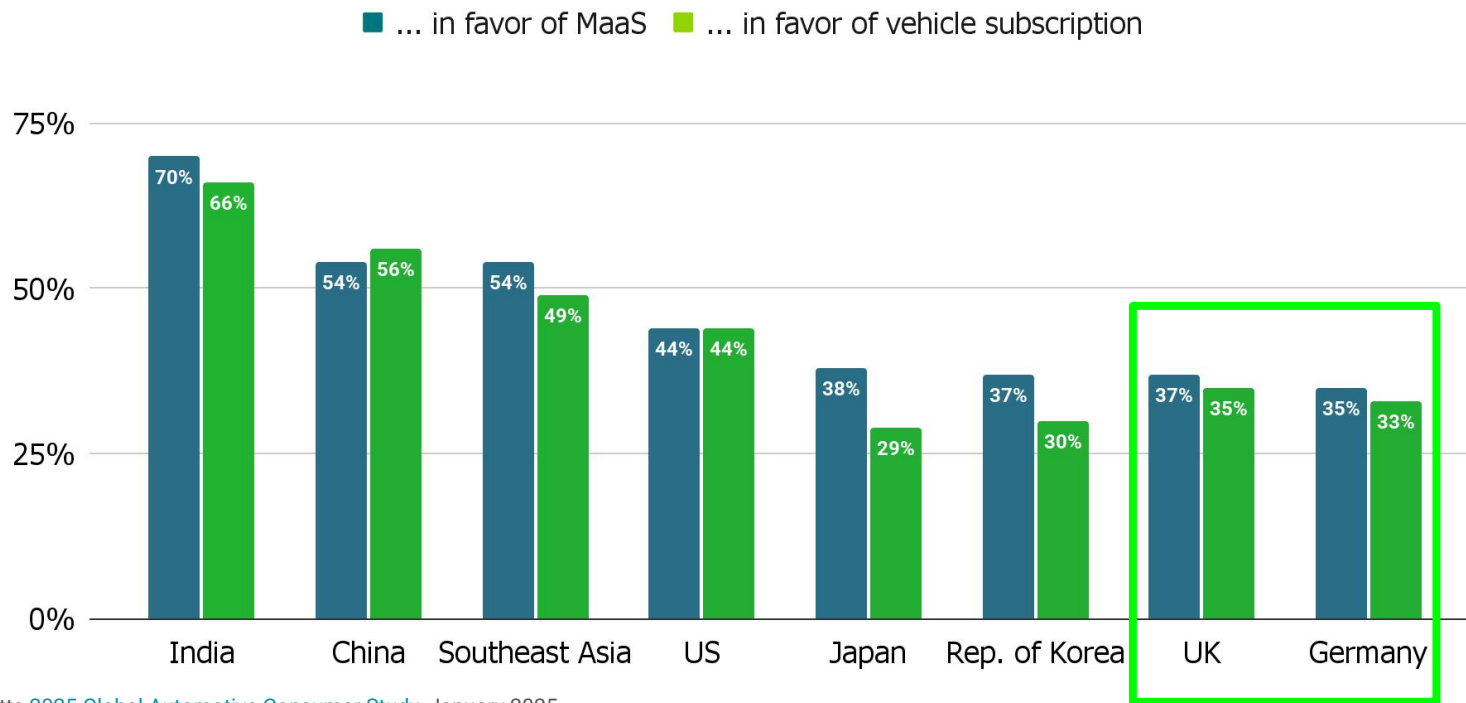
Outside NL, leasing growth reducing trade-ins at dealerships



Some EV models in oversupply

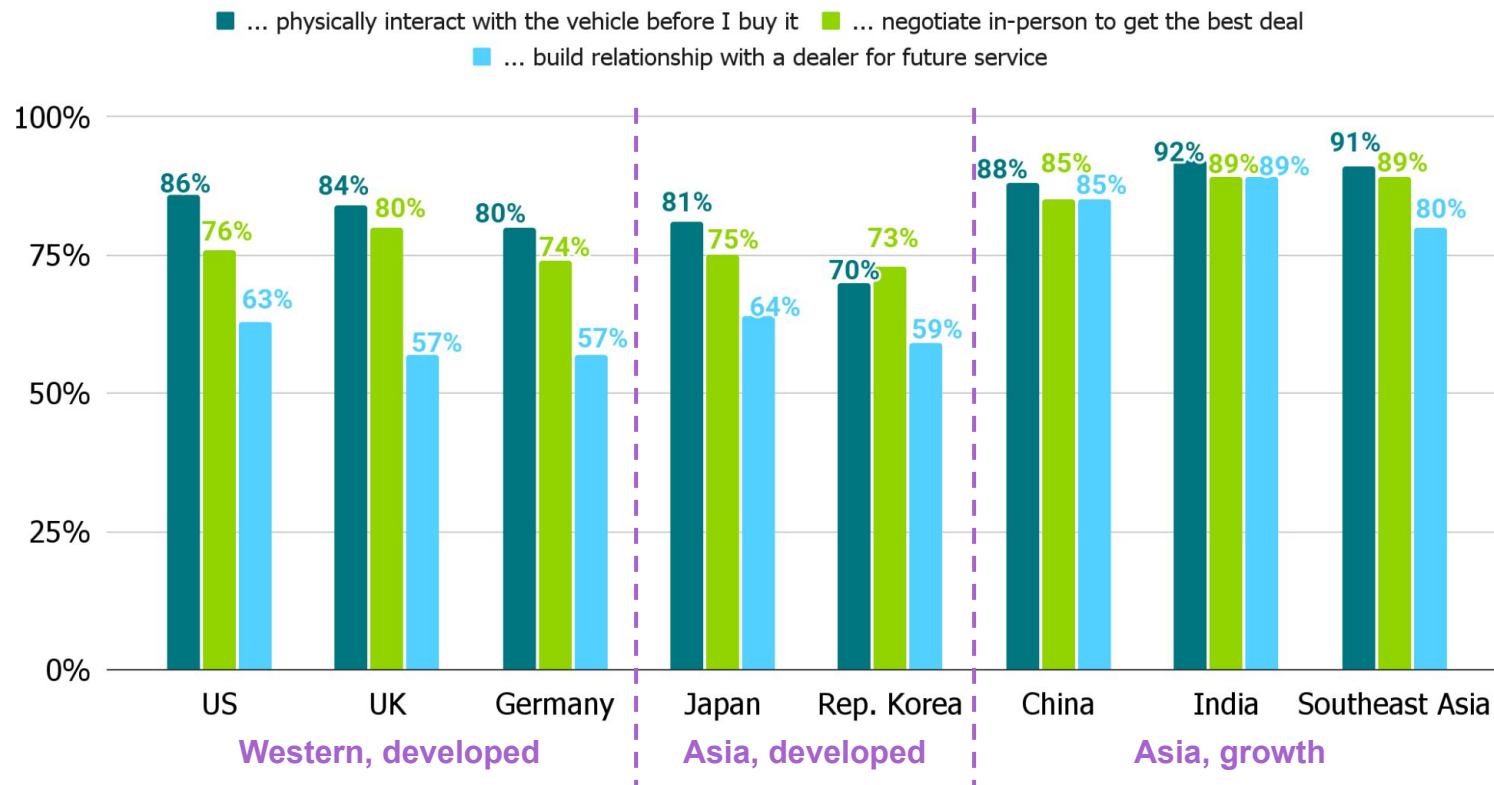
Source: AIM Group analysis, AutoTrader (U.K.) insights team.

Willingness to give up vehicle ownership: 18-34 year olds



Source: Deloitte [2025 Global Automotive Consumer Study](#), January 2025

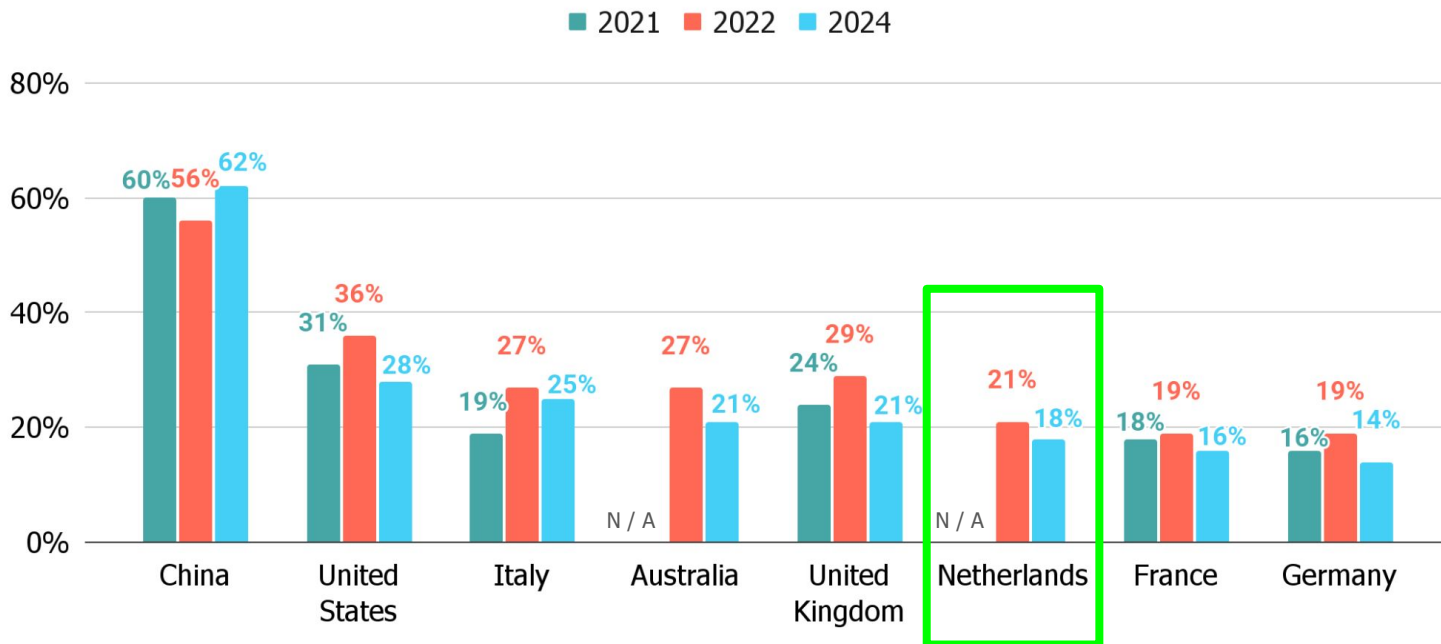
Note: MaaS = "somewhat willing / willing / very willing;" subscription = "somewhat interested / very interested"



Source: Deloitte [2025 Global Automotive Consumer Study](#). Data selectively charted and further analyzed by the AIM Group

Consumer niche willing to 'click and collect'

% who agree / strongly agree they're happy to buy their next car on "click and collect"



Younger Drivers:

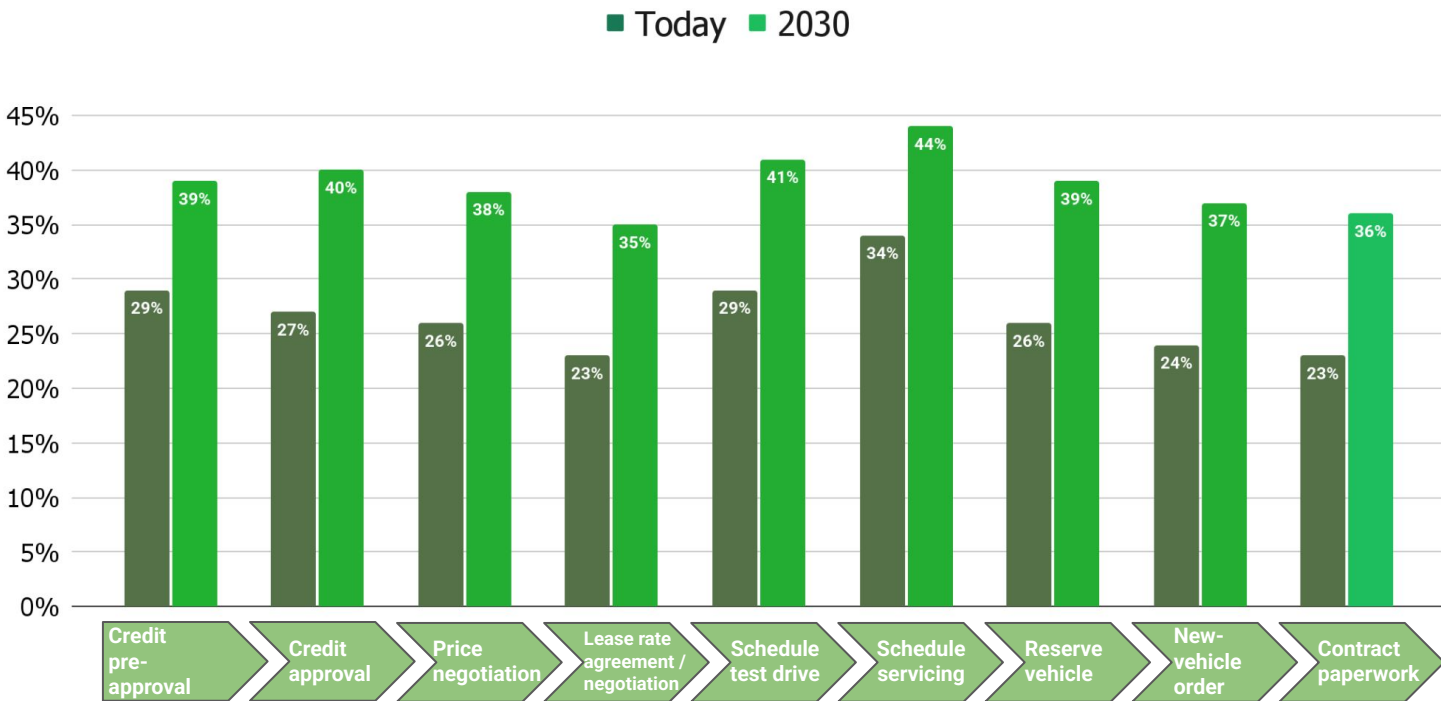
61%

of drivers 25-44
may consider online
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Source: OC&C Strategy Consultants

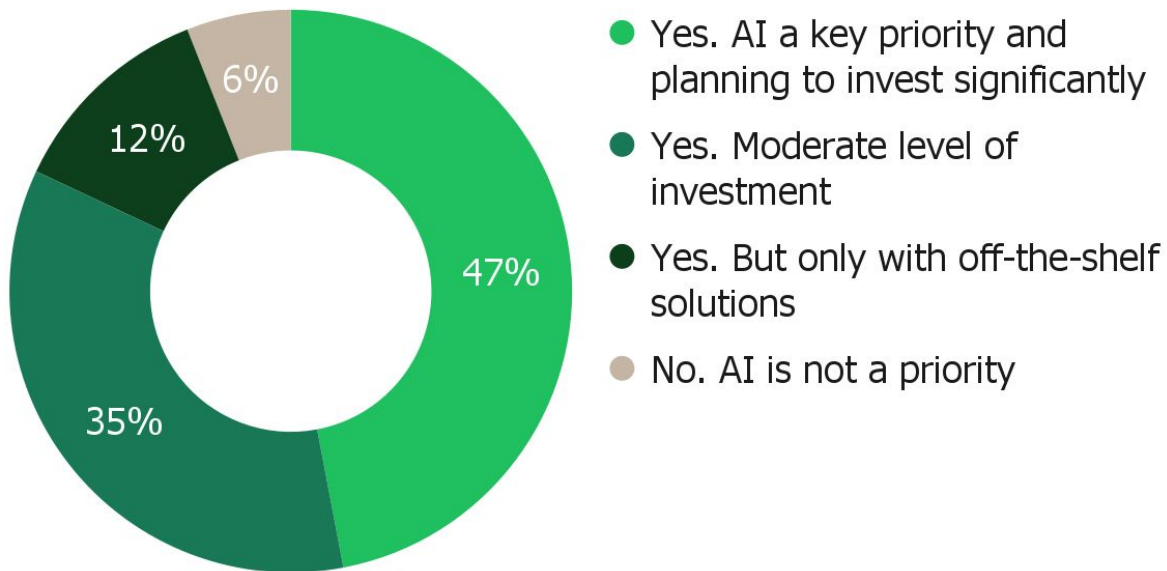
Question: "To what extent would you agree with the following: I would be happy to purchase my next car on 'click and collect' or home delivery - without seeing it first."

Share of customer activities conducted online (%)



Source: BCG: [Steering US Auto Dealers Toward a Profitable Future](#), March 2025. Building on US dealer sentiment survey, 2025, BCG analysis

Would you be willing to invest in building AI capabilities in your dealership over the next two years?



Source: BCG: [Steering US Auto Dealers Toward a Profitable Future](#), March 2025. BCG analysis, building on US dealer sentiment survey, 2025.