



How Digitalization is Impacting the Customer Journey: Aligning the Needs of OEMs, Dealerships, and Consumers in Germany's Automotive Market

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	<p>ABSTRACT</p>
<p>2021 Research Leap/Inovatus Services Ltd. All rights reserved.</p> <p>DOI: 10.18775/jibrm.1849-8558.2015.91.3001 URL: https://doi.org/10.18775/jibrm.1849-8558.2015.91.3001</p>	<p>This study explores how digitalization impacts and reshapes the customer journey in Germany's automotive market, focusing on the alignment of needs among Original Equipment Manufacturers (OEMs), dealerships, and consumers. As digital technologies enforce, the previous linear car-buying process has become fragmented, involving numerous online and offline touchpoints. To remain competitive, OEMs must integrate these touchpoints seamlessly, offering a cohesive and personalized experience that meets the increasing expectations of consumers and dealerships alike. The research highlights the importance of a "phygital" strategy, a mix of digital and physical interactions, to create a compelling customer journey.</p>
<p>Keywords: <i>Impact digitalization on customer journey, Customer journey automotive industry, OEMs adopting digital transformation, Dealerships digitalization strategies, Consumer expectations in automotive sales, Integration of digital technologies in customer journey, Customer experience automotive</i></p>	<p>A new Customer Journey model in the automotive market was developed to address the current market dynamics, incorporating digital technologies like artificial intelligence, virtual reality, and big data analytics. These technologies enable personalized customer experiences, improved communication between OEMs and dealerships, and more efficient processing of customer needs. The study also presents actionable recommendations for OEMs, including the continuous adaptation of the customer journey, enhanced collaboration with dealerships, and strategic investments in digital tools. These steps are critical for providing an immersive and engaging customer experience that satisfies both consumer demands and dealership requirements.</p> <p>The findings underscore the need for a holistic and adaptive approach to managing the customer journey in an increasingly digital environment. OEMs that successfully implement these strategies will gain an improved positioning to navigate the complexities of the modern car-buying process, ensuring long-term customer satisfaction and loyalty.</p>

1. Introduction

Digitalization has become a ubiquitous and widely discussed concept, influencing various aspects of society, politics, and the economy (Becker and Pflaum, 2019). It is a powerful driver of innovation, competitiveness, and progress, and has fundamentally transformed the way businesses operate (Harvard Business Review, 2021).

One area where digitalization has had a profound impact is in shaping the Customer Journey. As customers' expectations have evolved, businesses are increasingly focusing on delivering personalized, seamless experiences across multiple touchpoints, both online and offline (Gradillas and Thomas, 2023). This shift is particularly evident in the automotive industry, where digital technologies are transforming the way cars are marketed and sold (Lempp and Siegfried, 2022). Within traditional German dealerships, there has been a shift towards adapting to new models of distribution, such as the agency model and direct online sales, to meet the changing

demands of consumers. Manufacturers like Volkswagen, Mercedes, and Tesla have been at the forefront of this transformation, seeking to reduce costs and enhance the customer experience by embracing digital strategies (IBIS World, 2024).

As digitalization continues to reshape entire industries, the automotive sector stands at the turning point of significant change. The development of a customer-centric and innovative Customer Journey is critical for automakers and their dealerships to thrive in this increasingly competitive landscape (Malewski, 2023). Therefore, it is essential to analyze the impact of digitalization on the Customer Journey within the automotive market and adjust strategies to better meet both customer and dealer needs (Lempp and Siegfried, 2022).

1.1 Problem Statement

The automotive industry is undergoing significant disruption due to rapid advancements in digitalization, leading to fundamental changes in customer expectations and buying behaviors (Reindl, 2023). Traditional sales models, heavily reliant on dealerships and in-person sales, are being replaced or reinforced by digital touchpoints (Elste, 2023). The rise of new online touchpoints, such as online platforms and online consulting options, presents both opportunities and challenges for automakers and dealerships. As a result, there is an urgent need to reassess and redefine the Customer Journey in the automotive industry to stay competitive and meet evolving consumer demands.

1.2 Aim of the Study

The aim of this study is to explore the impact of digitalization on the Customer Journey within the automotive industry, with a focus on vehicle sales. By analyzing how digital technologies are reshaping the relationship between automakers, dealerships, and consumers, the study seeks to identify strategies that can help automotive companies adapt to changing market dynamics. This research will provide insights into how OEMs and dealers can leverage digitalization to enhance the customer experience, improve operational efficiency, and maintain competitiveness in a rapidly evolving market environment.

Given the complexity of this topic, the main research question is further broken down into three sub-research questions. These sub-questions allow for a deeper analysis of the digitalization aspects affecting the customer journey in new car purchases, ultimately enabling a comprehensive answer to the main research question:

1. How does digitalization influence the individual phases of the Customer Journey during a new car purchasing process?
2. To what extent do digital technologies affect the design and structure of the Customer Journey in the new car purchasing process?
3. What are the expectations and needs of customers and dealers regarding the design of the Customer Journey in the context of new car purchases?

By addressing these questions, this study aims to deliver actionable recommendations for OEMs that align with the needs of both customers and dealers, while also reflecting broader digital transformation trends within the automotive industry.

2. Literature Review

Digitalization, as defined by Elste (Elste, 2023), encompasses the entire transformation of processes, organizations, communication and even business models. This shift is a precursor to digital transformation, which Kollmann (Kollmann, 2022) describes as an ongoing and far-reaching process of change for society, business and politics based on digital technologies. This transformation fundamentally alters

how information, communication, and transactions occur among various actors, necessitating a re-evaluation of traditional approaches in marketing and customer engagement. The customer journey, which is crucial in marketing, is defined by Hopf as the series of steps a customer takes toward making a purchase, encompassing all interactions and touchpoints across communication channels (2021).

Various customer journey models can be found in literature, which depict the course of the customer journey. A detailed overview of the variety of models can be found in Table 1.

Two common customer journey models were established by Kreutzer (2021) and Deges (2020). Kreutzer's model emphasizes the integration of online and offline touchpoints through the concept of "noline" highlighting the fluid movement between digital and physical platforms. Despite its insights, this model is somewhat static and may not fully account for the dynamic nature of emerging digital tools like Artificial Intelligence and evolving social media platforms such as TikTok.

Table 1: Customer Journey Models Overview

Nr.	Model name	Primary source	Year	Publisher
1.	Sales Phase Model	Industrielles Vertriebsmanagement	2001	Vahlen
2.	Consumer Journey Loop	Consumer Journey Loop	2014	Smart Media Alliance
3.	Customer Journey and Approach by OEMs	Mobilität in Zeiten der Veränderung	2019	Springer Fachmedien
4.	Phases of the Purchasing Process	Mobilität in Zeiten der Veränderung	2019	Springer Fachmedien
5.	Customer Experience Journey	Kundenzentriertes Markenmanagement	2020	Springer Fachmedien
6.	Data-driven Marketing Along the Customer Journey	Data-driven marketing	2020	Springer Fachmedien
7.	Traditional and Online Supported Purchase Decision Process	Grundlagen des E-Commerce	2020	Springer Fachmedien
8.	AI-enabled Digital Sales Funnel	Digitales Management und Marketing	2021	Springer Gabler
9.	Customer Journey	Digitales Dialogmarketing	2021	Springer Gabler
10.	Customer Journey - from Online and Offline to Noline	Praxisorientiertes Online-Marketing	2021	Springer Fachmedien
11.	Overall Customer Experience	Digitales Dialogmarketing	2021	Springer Gabler
12.	Purchase Decision Process in Detail	Digitales Management und Marketing	2021	Springer Nature
13.	7-stage Customer Journey Model	Aufgesang GmbH	2022	Aufgesang GmbH
14.	Automotive Customer Journey	Online Car Sales Studie 2023	2023	MHP Consulting GmbH
15.	Customer Journey Layers	Ecommerce Customer Journey Maps 101 (2024)	2023	shopify
16.	Customer Journey Touchpoints	Ecommerce Customer Journey Maps 101 (2024)	2023	shopify

Conversely, Deges' model differentiates between traditional and online purchasing processes, focusing on the integration of information search and evaluation phases. However, its strict separation of traditional and digital processes may not adequately reflect the interconnected nature of modern purchasing behaviors. (Deges, 2020)

In the automotive industry, the customer journey is notably longer and more intricate (Reidel, 2023). Customers interact with both digital and physical touchpoints over extended decision-making periods (Deutsche Automobil Treuhand, 2023).

Stirzel and Di Nisio (2021) propose a six-phase model. This model distinguishes between a current and future customer journey model, which are compared. This model addresses the complexity of the automotive customer journey but does not fully capture the impact of emerging digital technologies on customer behaviors. In addition, the model does not combine transfer time between models and is therefore inadequate for the current situation in automotive sales.

Despite extensive research on digitalization, digital transformation, and customer journey models, a significant research gap persists regarding their specific impact on the automotive sector. The industry has been relatively slow to embrace digital solutions, and existing literature does not adequately explore how original equipment manufacturers (OEMs) and dealerships can adapt their sales and marketing strategies to meet evolving consumer expectations for personalized digital experiences. This study aims to address this gap by analyzing how digital technologies influence customer experiences and purchasing behaviors in the automotive industry. By integrating concepts of digitalization and digital transformation with established customer journey models, this research seeks to offer a comprehensive understanding of how technological advancements are reshaping customer interactions in automotive sales in Germany.

3. Research Methodology - Materials and Methods

The research approach integrates a comprehensive literature review, qualitative research through expert interviews, and qualitative content analysis to create a robust framework for understanding the impact of digital transformation on the Customer Journey. The study relies on an extensive literature review based on Webster and Watson (2002) and vom Brocke et al. (2009) to provide a solid foundation for the research.

This review covers existing theories and models related to digitalization, digital transformation, customer journey, and their application within the automotive industry. It addresses key areas such as the influence of digitalization on the customer journey, the adaptation of OEMs to digital transformation, and the strategies employed by dealerships to meet evolving consumer expectations. By synthesizing insights from various sources, the literature review identifies

gaps in current knowledge and informs the subsequent qualitative research.

Given the complexity of the customer journey in the automotive sector and the rapid pace of digitalization, qualitative research is chosen as an appropriate method for obtaining in-depth insights (Wichmann, 2019). Experts are selected for interviews based on their ability to provide detailed, contextualized information that quantitative methods may overlook (Berger-Grabner, 2022). Eight experts are chosen based on their extensive experience and expertise pertinent to the research questions. The selection criteria include significant professional experience in digital transformation, customer journey management, or the automotive industry, relevant academic qualifications in fields such as digital technologies, marketing, or automotive engineering, and practical experience in implementing digital strategies or innovations within the automotive sector. Additionally, two customers who have recently purchased one or more cars were included in the interviews. The profiles of the selected experts are detailed in Appendix A.

A semi-structured interview format is utilized to ensure flexibility while maintaining consistency across interviews (Döring, 2023). The interview guide includes sections on background information, core questions, and identifying problem areas. Background information questions pertain to the expert's professional background, current role, and experience in the automotive and digital transformation sectors. Core questions explore the impact of digitalization on the customer journey, aiming to uncover insights into how digital technologies are reshaping customer experiences and expectations. Critical issues address more nuanced or controversial aspects of digital transformation and its implications for automotive sales and customer engagement. The interview guide is designed to allow for follow-up questions and deeper exploration of specific topics as needed. Following the interviews, the data is transcribed and analyzed using qualitative content analysis, chosen for its systematic approach to interpreting textual data and uncovering meaningful patterns. The qualitative content analysis adheres to the framework established by Kuckartz (2022), involving categorization, coding, and analysis of the data. The use of qualitative data analysis software, specifically MAXQDA, ensures transparency and reproducibility in the analysis process (Kuckartz and Rädiker, 2019).

Table 2: Research Categories

Category 1: General Overview of the Customer Journey
Category 2: Information Phase
Category 3: Interaction Phase
Category 4: Decision Phase
Category 5: Purchase Phase

Category 6: Handover Phase
Category 7: Retention Phase
Category 8: Digital Technologies
Category 9: Challenges and Outlook

The findings are organized into nine deductively defined research categories and are supplemented by inductively developed subcategories, which help to answer the research questions (Table 2).

This structure offers a comprehensive analysis of the different stages and key touchpoints in the automotive customer journey. Each category reflects specific aspects crucial for understanding customer interactions, decisions, and retention in the context of the automotive customer journey.

In summary, this research methodology combines a thorough literature review with qualitative expert interviews and content analysis to explore the impact of digitalization on the automotive customer journey, providing a comprehensive understanding of how digital transformation affects customer experiences and assisting automotive companies in adapting their strategies accordingly.

4. Results

This section presents the key findings of the research, organized by the three sub-research questions to answer the research question. Each subsection summarizes the results and provides insights from the expert interviews and literature review. The findings highlight how digital transformation impacts the customer journey, the role of digital technologies, and the expectations from customers and dealers.

4.1 Influence of Digitalization on the Customer Journey Phases in New Car Purchasing Processes

Digitalization has transformed each phase of the customer journey in purchasing a new car. In the information phase, traditional offline touchpoints such as brochures and in-person consultations have been replaced or supplemented by online tools like car configurators and comparison websites. Customers now rely on digital marketing channels, including social media, Search Engine Optimization (SEO), and online advertisements, which provide more personalized, real-time information.

Figure 1: Developed Customer Journey Model

This shift has increased access to data but has also prolonged the research phase due to information overload. In the interaction phase, customers now engage more through self-service platforms, such as online comparison portals, reducing reliance on dealership visits. In the decision phase, tools like chatbots and virtual assistants help clarify questions, support decision-making, and enhance customer service efficiency. Despite the shift towards digital interactions, the personal, in-dealer consultation and physical vehicle experience remain important to finalize the purchase decision. The purchase phase is now streamlined through online contract signing, enhancing transparency and efficiency. Even in the handover phase, digital tools like video tutorials help customers get acquainted with their vehicles. Finally, in the retention phase, digital tools such as vehicle apps and personalized marketing (email or social media campaigns) help maintain long-term customer relationships.

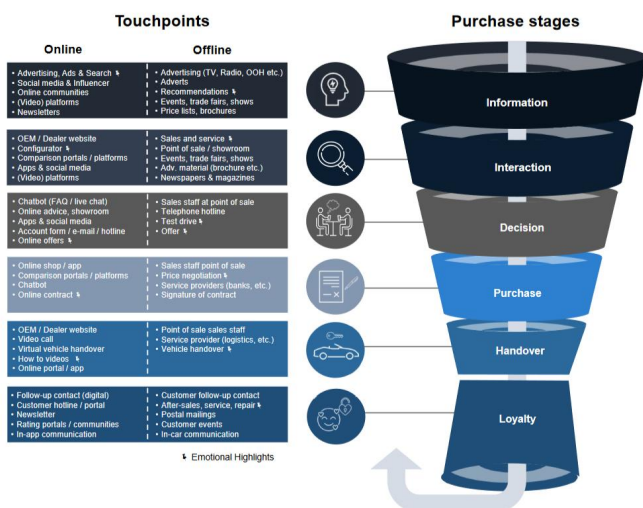
Based on the results, the customer journey model for new car purchases can be designed in Figure 1.

4.2 Role of Digital Technologies in Shaping the Customer Journey

Digital technologies have redefined the design of the customer journey by improving customer experiences and optimizing dealer operations. During the information phase, user-friendly interfaces, AI-driven chatbots, and personalized content driven by machine learning have made information more accessible. Virtual and augmented reality (VR/AR) technologies in the interaction phase now allow customers to explore vehicle configurations and test features remotely, accelerating decision-making. Throughout the journey, Customer-relationship-management (CRM) systems and data analytics play a crucial role in delivering targeted, personalized experiences. For example, online contract signing and omnichannel strategies enable customers to switch seamlessly between platforms during the purchase phase. These technologies also support an efficient and cohesive customer experience across different channels, online or offline. During the handover phase, digital tools such as video tutorials help enhance customer understanding of the vehicle, while manufacturers' apps help foster continuous engagement in the retention phase. Technologies such as big data analysis and real-time customer insights support the development of customer-centric strategies and improve overall satisfaction.

4.3 Customer and Dealer Expectations Regarding the Customer Journey

Customer expectations regarding the digitalization of the customer journey have evolved, influenced by experiences in other industries such as e-commerce. Customers now expect a smooth, flexible, and personalized experience across all



touchpoints. In the information and decision phases, they demand easy access to transparent and reliable information that simplifies complex decisions, such as total cost comparisons or financing options. Furthermore, customers expect seamless transitions between online and offline interactions, facilitated by intuitive, flexible, and mobile-friendly solutions.

For dealers, efficient and supportive digital tools are essential to understanding and meeting customer needs. CRM systems, comprehensive customer data, and an integrated online-offline experience enable dealers to provide tailored services. Dealerships also expect robust support from manufacturers, including training in digital tools and assistance with digital transformation, to handle the current challenges, such as the shortage of skilled personnel.

4.4 Customer Journey Design Under the Influence of Digitalization to Meet the Needs of Customers and Dealers

To answer the research question of how automotive manufacturers should design the customer journey for new car purchases considering digitalization to meet the needs of both customers and dealers, a strategic and holistic approach is required.

The research findings highlight the importance of integrating digital technologies into every phase of the customer journey. Physical touchpoints, such as test drives or vehicle handovers, must seamlessly connect with digital solutions to create personalized and emotional experiences tailored to the individual needs of customers. These solutions also ensure efficient collaboration with dealers.

Key technologies include artificial intelligence (AI), virtual and augmented reality, and big data. These tools can streamline processes, enhance personalized interactions, and improve the overall customer experience. Continuous investment in and integration of these technologies within the customer journey help create a cohesive and user-friendly experience, ultimately driving customer satisfaction and loyalty.

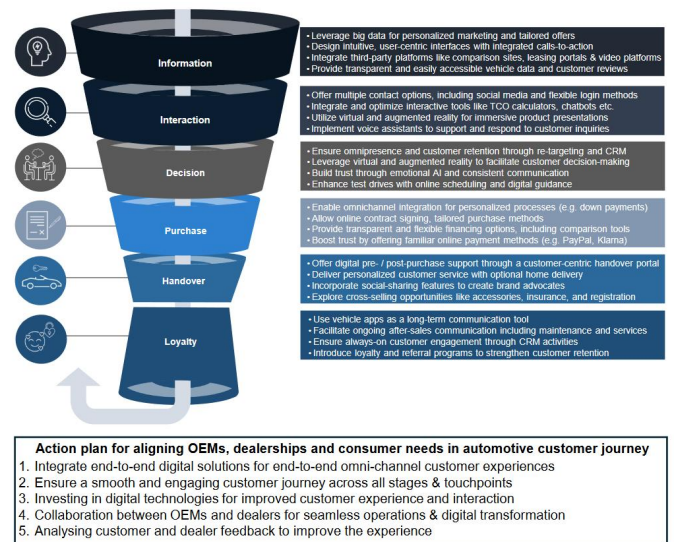
Collaboration between manufacturers and dealers is crucial. Manufacturers must provide resources and training to support dealers in implementing new technologies. A harmonious partnership ensures the successful adoption of innovations and the delivery of a consistent customer experience. Additionally, feedback mechanisms should be established to continuously improve the customer journey and adapt to evolving expectations.

While digitalization offers numerous opportunities to optimize the purchasing process and better understand customer needs, the research also identifies certain limitations. The developed customer journey model, which incorporates both online and offline touchpoints as well as emotional highlights, captures significant elements but has limitations in terms of flexibility and the individuality of purchasing processes. The increasingly fragmented and agile nature of modern purchasing behaviors may require more dynamic models that better address the flexible needs of customers.

In conclusion, digitalization plays a pivotal role in shaping a successful customer journey. However, manufacturers must ensure they are employing the right technologies and fostering close collaboration with their dealers to provide customers with a seamless and engaging buying experience.

The results are summarized in the figure 'Recommendations for action to design the customer journey in automotive sales' in Figure 2.

Figure 2: Recommended Action for the Customer Journey



5. Discussion

This research has demonstrated that digitalization significantly impacts the customer journey in the new car purchasing process. The advance of digital technologies has disrupted the previously linear customer journey, introducing numerous online and offline touchpoints and micro-decisions that shape interactions with manufacturers and dealers. The ability to offer a personalized and tailored customer journey has become a crucial factor in influencing the purchasing process. It is essential to track the customer journey closely and provide relevant information at the right time and context. Markets such as China show that digitalization could further enhance the customer journey, offering not just immersive experiences but also enabling a deeper analysis of customer needs.

To meet the evolving needs of both customers and dealers in the digital era, automakers must continuously adapt and refine their customer journey strategies. The term "phygital" established by Jens Thieme highlights that integrating physical and digital touchpoints is vital for achieving a sustainable and positive customer experience (Schlieker, 2022). The term underscores the importance of physical experiences while also emphasizing the necessity of a robust online presence. For OEMs and dealers facing numerous challenges, digitalization presents opportunities to innovate processes and make automotive sales future-proof.

The findings open new avenues for future research. It would be valuable to explore other automotive markets, such as China, or to examine specific phases of the customer journey in greater detail, such as the information or purchasing stages. Future studies could focus on how specific digital technologies, like chatbots or virtual sales advisors, can enhance the customer journey. Additionally, analyzing successful applications of digital technologies in other markets could help adapt and implement effective strategies. The automotive industry is undergoing significant changes that will fundamentally alter how new cars are purchased. OEMs must strategically leverage digital technologies to address the evolving demands of modern sales and remain competitive. The goal should be to provide a compelling and personalized customer experience, offering the right information at the right time and context through the appropriate digital medium.

5.1 Critique and Reflection

A new customer journey model for the new car purchase process was developed and supplemented with recommendations for automakers. This model was created because existing models did not fully account for current market demands and technological advancements. The research revealed that individual preferences and customer experiences are too complex to be captured by a simple model. The chosen funnel representation of the customer journey, which symbolizes a linear process, is increasingly questioned. The digitalization and individuality of customers and dealers have fragmented and un-linearized the purchase process. Consequently, dynamic or agile models may become more relevant, addressing the complexities of modern purchasing processes.

The model's phase separation is limited, as customers often switch between phases or enter and exit the customer journey at different times. While the model incorporates various online and offline touchpoints and emotional highlights, it does not fully account for changes brought about by digitalization. Although the model incorporates current touchpoints and digital technologies, its ability to address the rapidly changing customer needs in the long term remains to be seen. Future research could further elaborate on the model, incorporating specific aspects such as different purchasing forms and analyzing the customer journey for business customers or electric vehicles.

The recommendations provided may not fully account for the specific circumstances of individual automakers. The proposed measures, while concrete, may lack the flexibility to address the diverse needs and challenges of different manufacturers. Different distribution models, such as indirect or direct sales through dealers, may require tailored approaches. Additionally, finding a uniform approach for collaboration between OEMs and dealers is challenging due

to varying levels of influence and willingness to implement new strategies. The collaboration with third-party comparison portals, driven by their interests, may also present challenges not fully addressed in this study. Economic feasibility and implementation ability of the measures require more intensive discussion before implementation.

Quantitative research could also be a valuable tool for identifying customer and dealer needs through larger samples. The research design of this thesis, which includes structured literature review, expert interviews, and qualitative analysis, adhered to established criteria for validity and reliability. Transparency and rigor in the use of MAXQDA ensured that the results are trustworthy and scientifically grounded.

Despite these limitations and criticisms, the results and developed model provide a comprehensive representation of the impact of digitalization on the customer journey in new car purchases. The model considers relevant online and offline touchpoints as well as emotional highlights, serving as a foundation for further research. The recommendations offer automakers a framework for making individualized adjustments to enhance the experience for both customers and dealers.

6. Conclusion

Digital transformation is reshaping the automotive industry, influencing both operational practices and customer interactions. The integration of digital technologies into the customer journey has created new opportunities for enhancing the buying experience but also presents challenges in balancing digital and traditional touchpoints. Automotive companies must navigate this evolving landscape by adopting a holistic approach that combines digital innovation with personalized customer engagement. As the industry continues to evolve, staying attuned to emerging digital trends and customer expectations will be crucial for maintaining a competitive edge and delivering exceptional customer experiences.

The impact of digitalization on the customer journey in the new car market in Germany is expected to grow significantly in the coming years. This trend is further supported by the entry of new automotive manufacturers into the German market. To remain competitive, automakers must adapt to the increasing integration of digital technologies to meet the rising expectations of both customers and dealers.

Digital technologies offer opportunities to enhance the customer experience using artificial intelligence for personalization, the expansion of virtual showrooms, and improved digital consultations. The growing importance of data analytics will enable a deeper understanding of customer preferences and facilitate targeted responses to individual needs.

The German automotive market will continue to evolve with increasing digitalization. Automakers who recognize and strategically leverage these trends early will secure a long-term competitive advantage.

Appendix A: Experts Overview

Nr.	Name	Job	Field of Expertise
Experts OEMs (focus on sales and customer journey)			
1.	Jürgen Stackmann	Automotive Manager, Lecturer and Director Automotive Industry (St. Gallen)	Passenger car strategy and sales
2.	Gunther Süs	Global Manager Digital Marketing and Customer Experience, Stellantis N.V.	Digitalisation and online sales
3.	Carsten Schoene	Direktor Product Marketing and Pricing, Hyundai Motor Europe	Digitalisation and online sales
Experts dealerships (focus on new car sales)			
4.	Bastian Korbmacher	Software Solution Manager, Ford-Werke GmbH	Car sales
5.	Ramon Sulzinger	Sales Manager, Autohaus Unrecht e. K.	Car sales
6.	Martin Kehlert	Manager Sales and Delivery, Tesla Germany GmbH	Car sales and Online sales
Experts Digitalisation and Customer Journey			
7.	Sebastian Bliersbach	Independent digital consultant / Head of Information Technology Department, City of Niederkassel	Digitalisation and customer experience
8.	Sarah Seidl	Customer Experience Manager, Stern Auto Holding GmbH	Digitalisation and customer experience
Experts new car customers			
9.	Ernst Georg Witt	New car customer Tesla Model Y	Customer perspective
10.	Marc Bertelsbeck	New car customer Jeep Avenger and Kia EV 9	Customer perspective

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