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Trends of Current and Future Retail Formats Based on Customer Personas. Implications on the Example of the Premium Automotive Retail

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ABSTRACT: External factors are influencing the strategic orientation of today's automotive retail. Innovative architecture, new job roles and digitalized processes are affecting the automotive dealerships and the whole industry. Furthermore, the current decision-making process in the retail industry is intricate due to the lack of available foresight regarding future investment opportunities. Consequently, retailers need to be able to anticipate which strategic direction could be future-oriented, which adjustments they need to anchor to create a sustainable environment and which shift is effectively needed to attract today's and future customers. Therefore, the issue of the automotive retail is to be well prepared for upcoming trends, shifts and new competitors by setting up a distinct market position. Although many changes in today's automotive retail are currently initiated, the uncertainty of the future-oriented retail format is omnipresent. New retail formats are developed and partly implemented in today's retail sector to reach the customers and address their needs of buying a car. The following journal paper is facing the objective to map retail formats with persona types of automotive customers. Thus, retail industry leaders such as experts in automotive retailing are interviewed to get an impression of how to map automotive retail formats with distinct customer groups. Hypotheses can be derived as well as closing the current knowledge gap in scientific literature of customer needs and upcoming retail sales formats. At the same time widening and deepening the research in the fields of marketing, sales and strategic management while using and discussing rigorous research methods.

KEYWORDS: retail formats, future retailing, automotive retail, consumer trends, customer persona types, customer expectations, car dealership

Introduction

Given the multitude of touchpoints, customers are faced with the challenge of choosing which retail format is relevant to them. Consequently, it becomes imperative for the automotive industry to identify the customer segments and persona types that align with specific retail formats. Different customer segments exhibit diverse needs and motivations, which are crucial in formulating an effective sales strategy for future retail endeavors (Skier 2019).

Existing scientific sources primarily present conceptual ideas for new retail formats, lacking in-depth exploration and fundamental insights into customer personas. Moreover, other industries have successfully pioneered their sectors by adapting retail formats to meet customer demands (Sinha and Kar 2010, 119-140). In contrast, the automotive industry is still in its nascent stages of implementing these proposed retail formats. Other industries such as the textile or the fast-moving consumer goods industry are shifting their sales concept to reach value-seeking customers (Krafft and Mantrala 2010, 3-10). Therefore, these industries are currently reacting to the key trends and developments, such as changing customer needs, increasing interest in retail store experience, retailer consolidation, emerging multi-channel retailing strategy, and changing the nature of competition within and between retailing formats (Krafft and Mantrala 2010, 3-10). These changes are having a dramatic impact on the way large retailers do business and strive to reach and satisfy their customers. Drawing learnings from the fashion and fast-moving consumer goods industries could provide valuable insights into the implementation of retail formats within the automotive sector.

Additionally, the literature suggests that new automotive sales formats for contemporary retail will emerge rapidly; however, the underlying characteristics of these formats remain unexplored. Current analyses of these new retail formats primarily focus on financial aspects and revenue streams, neglecting to consider customer needs and motivations as key perspectives (Sinha and Kar 2010, 119-140). Which is why the following research is conducted to combine today's and future retail formats with decision-making persona types to derive initial indications of a mapping model.

Thus, this paper seeks to answer the following research question (RQ) as an overall objective: *Which persona type or automotive customer, in terms of their behavior and needs, can be most effectively mapped to which automotive retail format?*

The present paper is structured into three primary sections. Firstly, it provides a summary of the current trends and observations in the automotive retailing sector. Secondly, it describes the existing retail formats within the context of these current trends, aiming to establish the prevailing state of the premium automotive industry. Lastly, it analyzes the implications of future retail formats based on personas of the automotive customer segments, as well as customer expectations during dealership visits. This analysis is based on a qualitative survey conducted by the researcher. The overall objective of this study is to provide an initial indication of customer segments and retail formats, ultimately leading to the derivation of a preliminary mapping model design.

Theoretical background

Trends in retailing

Looking at the retail as an ecosystem, trends for physical retail are being increasingly analyzed from both a practical and an academic perspective. By that, several studies identified crucial trends and effects on customer behavior when visiting a retail store. According to Cloughton, retailers are operating in a changing environment and therefore must react to anticipate developing costumer expectations. Hence, it is imperative for retailers to update their existing business models by prioritizing customer trends to foster their growth and development. (Cloughton 2020). For the upcoming research the analysis of the following trends is essential to demonstrate the transformation of retailing.

Create atmosphere

Especially in physical retail formats and stores the created atmosphere (e.g., music, fragrances, etc.) influences the customer's behavior. Several studies show an effect on consumer response while visiting a retail store (Morrin and

Chebat 2005, 181-191). "…the environment created by retail managers is an important strategic variable. Most of the work in atmospherics has focused on consumer reactions to environments while the strategic dimensions of this decision have largely been ignored." (Turley and Chebat 2002). That's why Rayburn and Voss elaborate the perception of retail atmosphere. The essential element of this study is the focus on the organism level rather than atmospheric investigations and stimulus response. Rayburn and Voss demonstrate that a customer interacts with the product but although with the environment. Especially the environment is crucial for a physical store and therefore the authors identify the interaction with the store itself as a key variable to create shopping value (Rayburn and Voss 2013, 400-407).

Reach customer by emotions

Based on research, emotions are the key drivers to create loyalty and satisfaction to a specific brand, a product or even a store. The theoretical framework underpinning this study is based on Verhoef et al. concept of customer equity drivers (CEDs), which are intricately connected to the establishment and maintenance of customer loyalty (Verhoef et al. 2009, 31-41; Souiden, Ladhari and Chiadmi 2019, 286-288). Further emotions can be triggered by the effect of entertainment (Swartz 2000, 123-132). Sales promotion could be presented in an entertaining approach to reach the customers emotion. Additionally, events which take place in store can create an additional value for customer loyalty. However, according to Chung, this effect depends on the target group as well as the segment and can therefore show different results (Chung 2018). As brand culture evolves, retailers that choose the approach to become an experience center focus on the experience rather than the sale. By aligning with the latest trends in the retail industry, retailers can effectively stay abreast of market developments and capitalize on the associated advantages. Thus, the experience centers should use the newest technology to engage their customers, create experience and showcase their brand without solely focusing on the purchase. Therefore, the storytelling of how to sell the product is changing to an experience based entertaining approach (Krell 2020; João et al. 2022).

Make products available

Because stores mostly have locations spread across a wide geographic area, they are well positioned to either deliver common items almost anywhere or make the product available for pick up. In contrast, online stores obtain wider range of items which are sometimes not available in retail stores (Krell 2020). Especially, the FMCG (fast moving consumer good) and the fashion industry depend on a high level of inventory to sell the products when they are needed. Due to a high amount of stock products, pricing rebates can occur (Munoz Macas et al. 2021, 71-78).

All these trends can as well be observed in the current strategic approaches in the automotive industry. "Automotive retail will shift from a product-driven to a customer-centric approach to drive customer loyalty and to adapt to changing customer behavior and expectations" (Miller 2015). Due to the uncertainty of today's retail, the shift of a product-driven to a customer-centric approach has already started. The rise of the omni-channel automotive retailer experience is affecting the customer journey of a dealership visitation. That is why the automotive industry is currently dealing with specific trends when it comes to retailing.

Retailing becomes retaining

The automotive retail as a physical space is changing its appearance and attitude towards the customers: less spatial, at least not in the form of sales space. Instead of product display space, various car dealership brands are focusing on experiential space. They understand that attracting the willingness of customers to visit the dealership is getting more complex. Hence, it can be inferred that the customer's motivation for visiting a retail establishment extends beyond the mere product itself. Rather, it is the desire for an enhanced experience, encompassing elements such as superior coffee and music, that serves as a primary driver of customer engagement and loyalty. This gives stationary retailer an advantage that e-commerce models can answer with convenience at best, but not with customer loyalty and trust build on stationary experience. Today, good retailing consists of good retaining, because retaining customers becomes the most important discipline, especially in the automotive industry (Schumacher 2023).

Showrooming as an experience

In the context of direct-to-customer (D2C) sales, the practice of showrooming is increasingly recognized as a crucial factor for achieving success in the market. The car dealership of tomorrow is a place where new models can be explored and experienced. By that, sales consultants only have to advise and not primarily to sell the product (Severin 2023). Asian OEMs (Original Equipment Manufacturers) are actively striving to meet the evolving needs of customers by establishing a community space that serves as a hub for interaction and product experience. This innovative approach entails providing not only the latest car models from their portfolio but also additional amenities such as childcare services, coworking facilities, and libraries. The aim is to create an exploratory environment where customers can engage with the brand and its offerings on multiple levels (Schumacher 2023).

Therefore, retailing requires a different mindset, new skills besides the classical sales approach. Retailing is becoming the new core competence of brands. All the data generated along the customer journey is the base to match current and future customer needs – exclusively available to the manufacturer. Data is the key to intelligent customer contact and care, for the development of needs-based solutions and new sales potential (Severin 2023).

Current retailing formats in the automotive industry

Studies and scientific sources are currently identifying four major retail formats in the automotive industry. The distinction between own retail and independent retail is of overriding importance. In the following, besides the classic (traditional) retail four different formats are introduced: pop-up stores, flagship stores, concept stores, and mixed formats (e.g., experience center or satellite hubs). Further designations, such as temporary stores or mall formats etc., will be stated. These form a sub-category to the first three mentioned. In order to distinguish the sub-categories, similarities and overlapping characteristics are given. Therefore, the mentioned formats will be elaborated in detail.

Traditional car dealership

Format Description: The traditional automotive dealership format is characterized by a full range of services. From car sales - new and used cars - to the offer of after-sales products as well as service and accessories. This format is called "full-fledged" automotive retail. The traditional car dealership is more likely to be found on a long car dealership mile. So, the customer can meet many OEM brands in one place. In general, this retail format is located on the outskirts of cities, in industrial areas or in rural areas near large cities. Test drives, consultation, car selection and the final contract signing takes place in this format. Thus, it is often named a complete branded dealer, and is known as a traditional car dealer format (Gall 2020).

Dedicated target group: The target group is very heterogeneous. Existing customers are among the format's most frequented audience. New customers also become aware of the format, but they are not the main target group. The format is more focusing on retaining customers in the long term - especially through the service and workshop offering. It can be observed that the customer interaction points with this format are becoming fewer for various reasons (Gall 2020).

Brand example: Nearly all heritage brands are applying the traditional format approach in their current brand mix appearance. In particular, the dealer network, which consists of contractual partners and therefore does not represent an own retail, is currently more likely to rely on this format. New players on the market such as Tesla or Asian OEMs such as NIO have not included this format in their brand presence and green field approach.

Flagship stores/brand center

Format Description: The word flagship is known by the Cambridge dictionary as "the best or most important product, idea, building, etc. that an organization owns or produces (Cambridge Dictionary 2023a)". A flagship store is developed to increase and create brand awareness as well as to strengthen a long-time relationship with the customer. In those often large and representative stores, the brand heritage is at the center of customer communication and utilizes technics to highlight key messages to their target group (Petermanns and Kent 2016). The decision to establish a flagship store is primarily driven by considerations related to brand reputation and reinforcement, rather than focusing solely on sales and profitability. It is noteworthy that even non-retail brands are now venturing into the creation of flagship stores to connect with their target audience through a specific dimension or experience (Varley 2005, 176). Studies by Haenlein and Kaplan show that especially flagship stores have significant impact on customer brand relationship. The corporate environment in which a customer interacts can significantly impact their purchase intent. (Haenlein and Kaplan 2009). For this reason, this concept is often called brand experience center. The customer can find almost each current product of the brand in the flagship store. A further extend of the flagship store is the innovation "cyberstore". The OEMs combine two dimensions – the digital product presentation and the personal advice by an employee (Ebel, Hofer and Genster 2014, 544). Hence, careful consideration is given to the extent to which investing in a typically costly location is justified and how effectively it can promote the brand's values (Baeuchle 2019).

Dedicated target group: Flagship stores are implemented to reach a heterogenous target group and to communicate distinct brand statements to mutual customer segments. Studies indicate that there is no certain target group for that kind of format, but the number of flagship stores visits are remarkable. A customer is more likely to visit a flagship store several times in general. This derivation is essential since the traditional retail format is visited proportionally less (Nierobisch et al. 2017, 117-137).

Brand example: Destination Porsche – Porsche established the new retail concept "Destination Porsche" for the first time in 2020. The "Destination Porsche" retail concept places customers even more at the center of attention. Customers should have the opportunity to immerse themselves in the brand, engage in personal interactions, and exchange ideas, such as enjoying a coffee in the lounge area. The flagship store provides access to nearly every Porsche model, not only for sales purposes but also for after-sales services. The customer can see through glass panes into the workshop and observe the process. The car handover is also designed as an emotional experience with special delivery rooms.

Volkswagen Flagship store – China is by far the most important market (in terms of sales) for the Volkswagen brand (Paba 2022). To further tap the potential, the brand has been showcasing itself with a flagship store in China. In the "Jung Baojie Volkswagen Indigo Center" in Beijing, Chinese customers can explore all Volkswagen models offered in China in one place. In addition to the car dealership, it also offers space for events, exhibitions, and other non-car related offers (Grimm 2016). The flagship store focuses on central topics such as e-mobility, connectivity, and autonomous driving. Besides the flagship store in Beijing the Volkswagen "Future Center" is also located nearby (Auto-Medienportal 2016).

Concept/boutique store

Format Description: The so-called concept stores are often defined as a "strategic approach for creating a destination experience". This store format locates in the inner-city center. The name boutique store comes from the similarity to a fashion boutique - a rather small store that offers a certain selection of products. Typically, such stores adhere to a specific concept or thematic focus, such as electromobility, lifestyle branding, or co-branding with fashion brands. Additionally, there are concept store approaches that periodically change their theme every three months, resulting in the creation of a "new" store each time (Pavel 2016).

Dedicated target group: This format is particularly common in the city center. Therefore, this approach is often associated with the acquisition of new customers or the reactivation of inactive existing customers. The aim is to create an accessible and open brand experience.

Brand example: Porsche Driven by Dreams - The "Driven by Dreams" brand store opened in Stuttgart city center in October 2022. The goal is to make Porsche's brand purpose more tangible. However, the name brand store is misleading in the characterization that this format is a concept/boutique approach – because the term "name brand center" is frequently employed to refer to the flagship store format. This is made clear by the fact that the concepts in the store change at regular intervals. This means that the entire interior is designed and elaborately changed according to a certain theme. Likewise, new vehicles are always on display to match the different concept. Another key element of the store is the regularly events held on site. Since October 2022, 35 events with a total of almost 1,000 guests have already taken place (Newsroom Porsche 2023).

Porsche Sylt – Porsche already established the concept store in 2017. The retail format has the aim to get in touch with the customer and to create a brand experience along a distinct product portfolio as well as its brand heritage. The architecture of the building is different comparing to a usual Porsche center. Only one vehicle is displayed besides accessories and other brand related products. The aim of this format is not linked to generate sales volume, rather it is about relationship management between brand and customer (Schmidt 2017). In 2017, the Porsche Studio Guangzhou, the second location worldwide, was opened. A further Porsche Studio was established in Beirut, Lebanon, in the beginning of 2018. All locations bear an individual signature and are adapted to the conditions on site and local requirements (autohaus.de 2017; Newsroom Porsche 2017).

Audi City – 2012, the first so called Audi City store was opened in London. Due to the aim of brand recognition openings in Beijing and Berlin followed (Petermanns and Kent 2016, 103). Until today, several Audi City stores have been built worldwide (autohaus.de 2018). Instead of physically exhibition vehicles, the entire product portfolio is presented in virtual form. Hence, the customer can discover the whole brand experience virtually. That strives the activation of the customers imagination and therefore strengthen the brand relationship (Dänzler 2014, 301). The target audience of the Audi City format benefits from a virtual showroom that offers a personalized customer journey tailored to their specific needs. By strategically locating Audi City near city centers, the brand is able to engage with customers in their familiar surroundings (Petermanns and Kent 2016, 223).

Pop-up

Format Description: Pop-up stores can be described as temporary brand presence stores in city centers. Those formats are often located in city malls and therefore simultaneously called mall format. The format allows retailers to execute projects with minimal resource utilization. Pop-up stores, fundamentally, serve as experimental platforms to test specific communication strategies with their target audience. The key characteristic of these stores is their impermanence, as they are implemented for a pre-defined period of time. In store, there are usually only a few vehicles on display – often the samples are changing from time to time and focus on product innovations. In addition, other brand products and material samples are omnipresent to pointing out the whole brand experience. Customers can often configure their vehicle on site and view it using new technologies like augmented reality technology and virtual reality glasses (Jongen 2018, 107-108; Wedeniwski 2014, 114). Therefore, the overall objective of this format is to create a brand experience and reach new target groups which are not yet related to the brand.

Dedicated target group: The offer is brought directly to the customers, rather than expecting them to seek it out. In an urban setting, original equipment manufacturers (OEMs) aim to target groups that typically have limited exposure to the brand or are unlikely to visit a traditional dealership format. This approach considers both the strategic location and the opportunity for customers to engage with the brand. The format is aiming to attract a relatively young target group by using modern technologies (the age varies by brand) (Business Insider Deutschland 2020).

Brand example: Almost every premium manufacturer is currently introducing or has already introduced a pop-up store format. Typically, this format is initially tested in the brand's most significant sales market before being expanded to other markets.

Porsche NOW is a format which is currently in the phase of implementation. Porsche NOW stands for a flexible retail concept designed for a short period of time, conceived for highly frequented city centers and shopping malls, and intended above all to appeal to new target groups. Store visitors can configure their individual vehicle live via augmented reality technology or VR glasses. Digital displays in the store show online sales offers of immediately available cars. The thematic focus of each sales pop-up store is determined individually by each retailer. Worldwide six pop-up stores exist which are designed according to the concept "NOW". Numerous other stores are planned worldwide in the next years - primarily in Europe and Asia (Rachor 2020).

Tesla On Tour – Tesla installed its Tesla's pop-up stores "Tesla On Tour" mainly in Europe (Spain, Portugal, France and Italy). This format has the objective to reach new customer segments by offering test drives on demand. Hence the store concept is highly flexible and can be transported and unfolded immediately. Tesla focuses on retail locations in upscale shopping areas and herby bypassing the traditional dealership approach. With this concept Tesla is supporting its idea of boutique stores which are in the city center as well as in malls. Both approaches appear with the idea of letting customer explore and learn about the brand and its products (Hitt, Ireland and Hoskisson 2014, 389; Tesla 2021).

Volkswagen, WE Concept – In Berlin Volkswagen created a location that is focusing on an open design and allows flexibility for individual use. The concept combined the concept store in the DRIVE Volkswagen Group Forum with a bar, lounge, checkroom, and exclusive interior design, allowing receptions for around 200 guests. Besides that, Volkswagen uses the WE Space for internal training purposes. This concept will be used for other cities in future to ensure a brand-based event location. The customer brand experience is named as the overall goal to attract new target groups (PresseBox 2020).

Mixed formats

Format Description: A so-called Service Experience Hub is primarily created for the after-sales service and handling of a vehicle. Besides that, a Showroom-Service concept is integrated to increase the vehicle brand experience for the customer. The format differentiate itself from a full-fledged sealer concept by focusing on service repairs However, it also invites service customers to engage with the brand experience through a connected showroom that showcases both sales and after-sales products in the same space. As a result, this format is driven by after-sales services but also stimulates sales. By consolidating all service vehicles in one location, the dealer can efficiently handle a large volume of service orders. These Service Experience Hubs are often situated on the outskirts of cities, where ample space allows for potential expansion opportunities (Kessler 2017; Rehse et al. 2020).

Dedicated target group: This format identifies no distinct target group by the OEM. Some Service Experience Hubs are differentiating between a private customer and business customer – especially fleet. In general, the customer's intention is to acquire a service for their vehicle, thus categorizing them as service customers.

Brand example: Mercedes-Benz Service Center – The Service Center was established in the beginning of 2020 in Münster. It is located near the airport and therefore named Airport-Center. The Service Center has a central location close to the German highway "Autobahn" (Mauritz 2020). This format is primarily utilized for the comprehensive process of receiving, evaluating, maintaining, and ultimately commercializing leased vehicles upon their return. Additionally, a small handover and showroom area is situated adjacent to the main building to facilitate the delivery of vehicles to customers. Until today the handover showroom is only in use for the fleet customer segment. Private customers receive their vehicle handover at the city store dealership. One advantage of this format is the reduction in outsourcing services to subcontractors and service providers. As a result, a greater number of working hours can be conducted internally, particularly in areas such as the workshop, painting, and reconditioning. Hence planning reliability, cost reduction and profit maximization through bundled and independent execution of self-defined after-sales processes is generated. Each process step is processed and documented in a digital tool. Herby each employee works through his or her process and enters it in the tool for documentation reasons. The reporting via dashboard is evaluated on a daily base (Mauritz 2020).

Mercedes-Benz World Berlin – With the opening in 2019 of the service terminal, the Mercedes-Benz retail Berlin is offering service packages for Mercedes-Benz and smart customers that simplify access to electromobility. The Mercedes World developed new processes, which are aligned with the individual customer needs. Therefore, this format is focusing on a smother, more efficient and consistent dialog-oriented service process with many digital aspects. Customers can book service appointments via application and the customer's vehicle is recognized via license plate scan as soon as it enters the Mercedes-Benz World and informing the service advisor of its arrival. At the same time, the customer vehicle is automatically checked for exterior damage via a 360-degree scan. A visual guidance system directs customers to a reserved parking space in the service terminal, where they are greeted by their service advisor. The Mercedes-Benz World is connected to the main building, which is the Mercedes-Benz flagship store in Berlin. Therefore, sales and after-sales are immediately connected in the same place (autohaus.de 2019).

Customer segmentation in the automotive industry

According to Kicova, Kral and Janoskova (2018), customers can be distinguished by the speed of decision-making that decisively influences them during the purchase process. These customer groups have been described in detail by Bryan and Jeffrey Eisenberg in their publication ´Waiting for Your Cat to Bark.´ The researchers utilized decision-making persona types as a foundation for their study on the automotive industry, specifically focusing on how brand communication should be developed to effectively reach these target groups. According to Eisenberg, four primary persona categories are delineated, 5-10% of the population can be classified into a competitive category, 45% into a methodical category, 10-15% into a humanistic category, and 25-35% into a spontaneous category of buyers (Kicova et al. 2018). Based on that study, in this paper the following figure 1 is derived. This system categorizes target groups who are interested in purchasing a car and visiting a specific retail format (see figure 1).

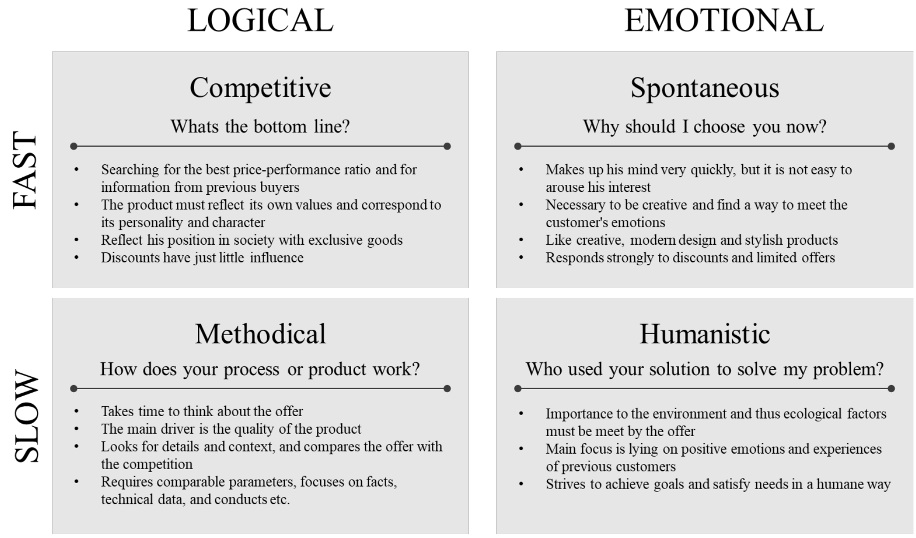

Figure 1. Decision-making persona types
(Own illustration – related to Bryan and Jeffrey Eisenberg 2006)

Thus, according to Kicova, Kral and Janoskova, customers can generally be divided into these four groups based on their purchasing behavior. However, this does not mean that these groups are universal. Thus, categorizing behavior is complex due to the dependency on the current situation of a customer, their mood, and their personality. Depending on the situation, the buyer may have several expressions from different categories. Moreover, the product itself plays a crucial role in the decision-making process (Kicova et al. 2018). For example, an automobile, which is referred to in this elaboration, receives greater and more extensive attention because it is a high-involvement product (Diez 2012, 31-41).

Research - Implication of future retail formats and customer expectations

Context of the research

The present study is based on a qualitative research project conducted in Germany. Its aim is to gain insights into the future of automotive retailing from a sales perspective. To achieve this, the study analyzes interviews conducted with executives from various German and international companies. These interviews include representatives from both international and national brands operating within the premium and luxury automotive segment. The surveyed experts are decision-makers in fields directly associated with the automotive industry, such as strategic original equipment manufacturers (OEMs), car dealership management, management of large international car dealer groups, and researchers specializing in future automotive retailing. The selection of interviewees was based on their extensive experience of over 10 years in the retailing field. The underlying research question determines the following elaboration – *RQ: Which persona type or automotive customer, in terms of their behavior and needs, can be most effectively mapped to which automotive retail format?*

Data Collection

The data for this study is collected through twelve semi-structured interviews. The sample consists of C-level management interviews and senior managers from national and international automotive companies, including OEMs, subsidiaries, car dealerships, and researchers. The interviews were conducted between October 2022 and March 2023. The interview sample was purposefully selected. Initially, the authors compiled a list of potential interview partners based on their positioning and background to ensure a broad coverage of national and international brands. Websites, reports, and LinkedIn accounts were afterwards reviewed to identify suitable survey participants. All eligible companies were approached for at least one representative interview. Participants were interviewed individually either in person or online. However, most of the interviews were conducted online using the video communication tool Microsoft Teams. The duration of the interviews ranged from 25 to 60 minutes and were conducted in German language. All participants provided consent to be recorded for research purposes. The consent included the interviewer's assurance to anonymize data such as names and company affiliations. The interviews followed a semi-structured format with open-ended questions and follow-up questions to clarify any unresolved topics. The order of the questions was adjusted based on the responses of each interviewee. Throughout the survey period, the interview guide was iteratively adapted and continuously improved upon knowledge about the topic at hand.

Analysis of the data

Following established qualitative research methods for interview data, as outlined by Strauss and Corbin (1998), the collected data was transcribed and analyzed using the qualitative data management software MaxQDA. Initially, an inductive approach was employed, and codes were created based on the transcripts. The collected data was examined in an open-ended manner, followed by a reduction process resulting in a structured data set. The analysis adheres to the principles of qualitative data analysis (Strauss and Corbin 1998), which involves reducing the data by organizing it into codes and subcodes, identifying patterns by connecting the coded data, and drawing conclusions. A deductive approach was employed, wherein the research questions were used to derive the main categories – so-called themes: market, retail formats, customer, and outlook. The first step involved determining which answers corresponded to each theme. Specific text passages, referred to as anchor examples, were then selected and translated from German (the language of the interviews) into English. Following this reduction process, paraphrases were created to summarize the anchor examples and condense them into core statements. The collected data was analyzed using the coding system depicted in table 1.

Theme	Main-code	Sub-code
Automotive retail market	Automotive Market changes	Indicators/Reasons
Retail Formats	Retail Characteristics in general (unspecific)	Retailing Trends
		Business Model "Agency"
	Retail Format Characteristics (specific)	City Store
		Pop-Up Stores
		Traditional Car Dealership
		Flagship Store
		Service Hub
	Retailing KPIs	KPIs to measure success (new/urban formats)
	Prioritization of core retail characteristics	Atmosphere
		Product portfolio
		Appearance
		Accessibility
Customer	Customer Segmentation	Competitive Customer Segmentation
		Humanistic Customer Segmentation
		Spontaneous Customer Segmentation
		Methodical Customer Segmentation
	Customer Trends	Behavior
		Expectations
Outlook	Future Retailing	Future Retailing Trends
		Future Retailing Formats

Table 1. Overview of themes, main-codes and subcodes
(Own illustration)

The following section presents the data analysis process to derive the results. Only a partial excerpt of the collected data is provided below. Specifically, the theme of "customer" and the sub-code of "customer segmentation" are listed below, as they contain valuable data for addressing the identified research gap.

Using an inductive approach, four codes were identified that pertain to customer segmentation in the decision-making process within the automotive industry. These codes encompass distinctions between competitive, humanistic, spontaneous, and methodical customer persona types. To enhance clarity and transparency regarding the researcher's methodology, table 2 displays the corresponding reduction and paraphrases derived from these codes.

Sub-code	**Representative quote / anchor example**	**Reduction**	**Paraphrase**
Competitive Customer Segmentation	Wettbewerbsorientiert glaube ich schon, dass das auch was mit dem Alter zu tun hat. Also, eine junge Zielgruppe - 25 bis 35 würde sich sicherlich auch bei einem Experience Center, bei einem Pop-Up wiederfinden oder an triggern lassen - würde nicht tendenziell extra in traditionelles Autohaus fahren.	A competitive customer is often younger. So, a young target group - between 25 to 35- would rather find themselves at an experience center and at a pop-up. This customer is usually not visiting a traditional car dealership.	A competitive buyer tends to be a relatively younger customer. They need less advice and are attracted by experience-oriented formats such as city stores and pop-up stores.
	Wer wettbewerbsfähig unterwegs ist, würde sich auch dazu verleiten lassen, einfach in der Innenstadt zu sagen: Ach was, wir gucken uns jetzt einfach mal zehn Minuten an - wir gehen mal schnell rein. Das ist ein Vorteil dieser Konzepte. Ich glaube das es mit dem Alter zu tun hat, mit der Hemmschwelle - wir beobachten, dass sich ganz junge Leute gar nicht beraten lassen wollen.	A competitive customer would also be tempted to visit a city center. That's one advantage of these concepts. Additionally, it has to do with age, with the inhibition threshold - we've noticed that very young people don't want to seek advice at all.	
	Für mich sehr wahrscheinlich im traditionellen Autohaus, weil ich bin in meinem digitalen Prozess so weit, dass ich jetzt sage, ich möchte eine Probefahrt machen, dazu brauche ich einen physischen Kontakt.	Very likely attracted by a traditional car dealership because the customer is well informed online, so that it now comes to the test drive and the physical contact. That is mostly covered by a traditional format.	A competition-oriented customer tends to visit a traditional car dealership - because of the desire for a test drive and the physical experience. The fact-oriented and price-performance approach is best matched in the traditional car dealership.
	Der Wettbewerbsorientierte ist sicherlich, was das Thema traditionelles Autohaus betrifft, dort nicht schlecht beraten, faktisch methodisch rein Auto kaufen.	The competition-oriented person is certainly well advised to buy a car from a traditional car dealership - takes a fact-oriented and methodical approach.	
	Der wettbewerbsorientierte Sucht nach dem besten Preis Leistungsverhältnis. Die Produkt Spiegel die Stellung in der Gesellschaft wieder. Der ist sicherlich tendenziell eher im traditionellen Bereich angesiedelt (…).	The competitive search for the best price-performance ratio. The product reflects the position in society. This certainly tends to be more in the traditional area (...).	
	…	…	…

Table 2. Anchor example of the sub-code customer segmentation

(Own illustration)

Findings

The findings of this study provide valuable insights into the alignment between customer/persona types and automotive retail formats. Additionally, the interview results offer guidance for characterizing automotive retail formats and identifying emerging trends in the industry.

Customer segmentation

In the automotive industry, customer segmentation reveals the presence of distinct persona types. These types vary primarily across different brands, as original equipment manufacturers (OEMs) tend to adopt a more brand-specific approach to persona development. The decision-making persona types described by Bryan and Jeffrey Eisenberg serve as a framework for characterizing these customer types, as reported by the interviewees, and aligning them with specific automotive retail formats.

The **competitive customer** persona was extensively discussed among the various interview participants (=IP). The interviewed individuals exhibit diverse opinions within this target group. Therefore, the categorization of the respondents is varied and not congruent – this is demonstrated by the following anchor examples. It was highlighted that this particular target group is likely to be younger and driven by experiences. *"A competitive customer is often younger. So, a young target group - between 25 to 35- would rather find themselves at an experience center and at a pop-up. This customer is usually not visiting a traditional car dealership"* (IP – 05).

Moreover, it was observed that a younger target group tends to require less guidance and is thus more inclined to seek out formats that inspire them. Consequently, traditional formats that emphasize intensive advisory services are less appealing to this target group. *"A competitive customer would also be tempted to visit a city center. That's one advantage of these concepts. Additionally, it has to do with age, with the inhibition threshold - we've noticed that very young people don't want to seek advice at all"* (IP – 09).

The competitive customer persona engages in thorough price comparisons, predominantly online. Accordingly, this customer is well-informed prior to visiting an automotive retail format. As a result, the initial stage of decision-making is already completed by the time of physical interaction with the brand. The interviewees emphasized that competitive customers not only compare prices, but also evaluate the product itself. They express a desire to physically test and experience the product, such as through test drives. Formats that are less focused on providing experiential elements are more likely to fulfill this requirement for the competitive customer persona. "*Very likely attracted by a traditional car dealership because the customer is well informed online, so that it now comes to the test drive and the physical contact. That is mostly covered by a traditional format*" (IP – 03).

Despite the primary focus on obtaining the best price-to-value ratio, the competitive customer persona also places importance on physically examining products. This preference aligns well with traditional automotive formats like the conventional car dealership or flagship stores, which offer a wide range of physical products for evaluation. "*The competitive search for the best price-performance ratio. The product reflects the position in society. This certainly tends to be more in the traditional area (...)*" (IP – 11).

The **humanistic persona** type is characterized as a deliberative individual who takes their time in making decisions. They rely on additional cues and emotional information, subjective factors to guide their product choices. Notably, this target group demonstrates a greater interest in seeking advice and guidance during the decision-making process. "*This target group needs a high level/intensity of advice and is more likely to gain information at a traditional car dealership format*" (IP – 11).

If a format has a thematic focus and thus embodies certain values, this target group is also addressed. "*that's the type of person who probably feels less comfortable in traditional car dealerships, but rather tends towards boutiques. In other words, this person is more likely to engage with the corresponding ecological perspectives e.g., vegan textiles, perhaps electromobility and alternative drive systems*" (IP – 12).

The **spontaneous customer** persona is characterized by their highly emotional nature, which drives their decision-making process. This persona is particularly drawn to experiential elements and seeks out brands that can evoke strong emotions. Consequently, formats that offer an emotional brand presentation and inspire customers are most appealing to this target group. Based on the interviews conducted, it was suggested that pop-up or concept stores are likely the most effective means of engaging with this persona. As a result, urban formats tend to be the primary focus for reaching this target group. "T*he spontaneous person, who is always looking for something very special and is emotionally driven, (...) is most likely to be found in a pop-up store*" (IP – 10).

The spontaneous customer, in their quest for stimuli, becomes aware of an urban format. This awareness can occur in a casual manner, such as during a shopping excursion in the city center. *"The spontaneous feels more addressed by the format flagship, concept / boutique and pop-up - to get an impulse. For instance - the spontaneous person who actually wants to buy a fashion product and sees accidentally an urban automotive format next door"* (IP – 8).

The **methodical customer** persona is characterized by a highly rational approach, where experience-oriented formats have less appeal. This target group places greater emphasis on facts and data in their decision-making process. This methodical nature is also evident in how this customer visits a car dealership. While they may visit only a few dealerships, their visits are purposeful and focused, with the intention of reaching a final decision. *"This target group will never walk into a concept store or pop-up store because they are approaching rather methodical/rational than emotional. They visit for instance three car dealerships, three different brands and afterwards are deciding. This target group wants to see the maximum range of products. They want to see everything that confirms their purchase and are just looking for clear facts"* (IP – 02).

Characteristics of retail formats

The **traditional car dealership** is commonly referred to a "car dealership mile" and is typically situated outside urban areas. In this format, various brands are positioned side by side, offering a wide range of products. Additionally, after-sales services are often provided alongside sales. The interview participants unanimously agree that this format is outdated. However, it remains a crucial component within the ecosystem of an Original Equipment Manufacturer (OEM) and plays a significant role in their network strategy. *"Large, glassy, metallic, cold, distant. Lots of cars, consultation-intensive, pushy salesperson wants to sell you a car. Little individualization, little personalization. Period"* (IP – 10). *"That is, of course, the car mile (…). This is something that is currently being dubbed a bit of a dinosaur and threatened with extinction. However, it has been shown that the automotive industry and, above all, the retail sector is already very resilient to change. In other words, it has been shown that the car dealership, where sales, services and after-sales are offered, is actually still the linchpin"* (IP – 08).

However, the future viability of this format is subject to critical discussion. While it currently holds value within the industry, there is a growing trend towards concentration in the distribution network. According to the interviewees, a significant portion of these traditional formats is expected to gradually disappear from the market. *"(...) there are still many, many, many car dealerships that will probably no longer exist in the future"* (IP – 11).

Flagship stores are seen as a forward-thinking format. These stores serve as brand destinations where customers can fully immerse themselves in the brand's world and receive a personalized brand experience. *"The brand center/ flagship is of course very good from a brand perspective, because I can basically present the entire brand to the customer as I imagine it. I bring the customer into such a complete world "* (IP – 10).

In addition to the future viability of these format and the expansion of flagship stores, there is also an anticipated increase in urban formats. It is argued that urban formats serve as traffic drivers for flagship stores, indicating a complementary relationship rather than a mutual dependence. Consequently, when customers encounter a brand for the first time in an urban format, such as in a city centre, they are more likely to visit a flagship store in the future to fully experience the brand's comprehensive offerings. *"What you can clearly see, is that these flagship formats are increasingly being complemented by new, primarily focused or urban formats. We see studios, we see temporary formats such as pop-up stores, where the focus is on brand representation, and in some cases also on sales. But we also see resource and investment-saving formats such as service points, express service, etc."* (IP – 06).

The **city store** format is commonly adopted by new market entrants, with Asian brands utilizing this strategy to establish their presence in Europe. The primary objective of this format is to generate brand awareness and engage with customers who may not be reached through other means, thereby creating an initial brand touchpoint. These formats are predominantly situated in inner-city locations, often selected based on the criterion of high footfall. *"These are brands that don't have a traditional footprint, which means they have to reach relatively quickly awareness. The best way to do that is to actually have a presence in the city centres"* (IP – 10).

Special automotive brands with a premium to luxury positioning are actively seeking highly desirable real estate properties within established and thriving environments. The fashion and lifestyle industry, in particular, is regarded as an ideal setting due to the presence of customers who align well with the brand and are more likely to spend time in these areas. *"Especially in the luxury segment. Sure, Mercedes is now turning it into a strategy (...) and then, like Louis Vuitton, Hermès and Gucci, they have to come into the city centers with all kinds of formats. Especially in the top locations of Stuttgart, Frankfurt, the Ruhr area, Berlin, Munich and Hamburg"* (IP – 11).

The interview results emphasized the importance of **pop-up stores**. This format will become much more widespread in the future. By being able to change locations and adapt specific themes, pop-up stores are highly agile. *"What will increase is the relevance of pop-ups, because we need to develop a much more agile understanding of retail. In other words, you have to go much more to where the people are. The expectation that they will come to me is over"* (IP – 10).

They are frequently located in areas that may not be traditionally considered suitable for permanent retail establishments. However, there are ample opportunities for collaborations between different industries. The fashion and lifestyle sector, for instance, often serves as a dependable partner for this format, attracting customers in highly frequented locations. *"And pop-ups are a great story. It's a really cool thing where you can make a big splash with department stores, i.e., in the luxury sector, for six months, show a new side of yourself and tap into new customer groups. That will proliferate. But I am firmly convinced that there will be a very strong trend towards urban format"* (IP – 09).

In addition to the aforementioned sales-oriented formats, another format that focuses on after-sales services is frequently mentioned - the **service hub**. The interpretation of this format varies. In some cases, it is described as a dedicated service point or workshop operation. Conversely, interviewees also describe it as a charging destination for electric vehicles, where customers can relax in a lounge while their vehicle is being charged. The service hub format is considered a standalone concept with significant added value in terms of processes, infrastructure, systems, etc., which can be specifically tailored to the after-sales department and structurally represented. Such customization may not always be feasible in a comprehensive "full-fledge" approach. *"We have developed formats (…) cost-optimized and process-optimized car dealerships can perhaps be built, which, for example, only serve the purpose of picking up cars and not just presenting cars and providing advice, but a small central delivery hall as a new format"* (IP – 08).

Further, the interviewees emphasized the significance of the atmosphere in physical stores, which surpasses the importance of the actual product. The emphasis lies on the product's allure rather than the breadth and depth of the displayed product portfolio. Similarly, the concept of personalized shopping experiences has not been fully comprehended in contemporary automotive retailing. Customers desire an individualized and almost exclusive encounter with the brand. *"In other words, the more you operate in the premium and luxury* *segment, the more you really have to address the needs of the individual customer"* (IP – 3). *"Large units are still off-putting for many customers and, in principle, they want a personal approach"* (IP – 08).

Hence, it is crucial to possess a comprehensive understanding of the target demographics and conduct detailed analyses. The presumed younger target demographic may exhibit distinct consumer behaviours and prioritize different factors when making automotive purchases. The future of automotive retail format development is not solely reliant on new car sales. Thus far, there has been a lack of development in pure used car formats that deviate from traditional used-car retail formats. *"Who actually buys new cars these days, they're incredibly old people. In other words, if I want to persuade a 28-year-old to buy a new car. You'd better do it in a fun way, embedded in the reality of their lives"* (IP – 6).

Discussion and Conclusion

This study contributes to the existing body of knowledge on the future of automotive retailing by examining current trends and developments in the industry. It analyzes the decision-making personas of customers in the automotive sector and matches them with present and future retail formats and their characteristics.

The study aligns with the trend of retailing evolving into retaining, as well as the idea of showrooming as an experience (Severin 2023). The significance of atmosphere, emphasized by each interviewee, is consistent with the insights provided by theoretical sources such as Rayburn and Voss, highlighting emotions as a key driver in future brick-and-mortar retail (Rayburn and Voss 2013, 400-407). However, there are discrepancies between the characteristics of retail formats identified in scientific sources and those derived from the analysis. Traditional car dealerships are described as effective in retaining existing customers and successful in attracting new target groups. Due to the full-fledged approach the findings demonstrate that this format is more likely to retain existing customers and not specifically acquire new target groups in the first step.

In summary, this research deepens the understanding of previous findings presented in the theoretical section through scientific sources. There is no gap between these statements and the theoretical background; rather, this research provides a more concrete depiction of the current state of research. Given the limited number of scientific approaches and surveys on this topic, this journal article presents an approach that warrants further discussion.

To operationalize these findings, a decision-making matrix is derived and presented in figure 2. The matrix integrates the theoretical descriptions - sourced from academic literature - with the data obtained from the qualitative survey. It shows exemplary the defined customer segments on the y-axis, whereas the x-axis illustrates the retail formats. It aims to present initial implications that describe which target audience/persona type has specific needs for the discussed format. This process demonstrates an initial matching between persona types and automotive formats. It can be reasonably assumed that each segment relies on different customer motivations and needs of visiting the format in question. Interestingly, not every retail format fits each customer segment. Hence, the decision-making matrix demonstrates those unsuitable connections between customer segments and retail formats. Consequently, the decision-making matrix highlights the mismatch between certain customer segments and retail formats. This suggests that some formats may need to be modified or updated in order to better attract these target groups. Alternatively, the characteristics of a retail format can be tailored to suit a specific customer segment. The following matrix is filled based on the data identified in the analysis. This filling enables an initial derivation and assignment of personas to their respective retail formats.

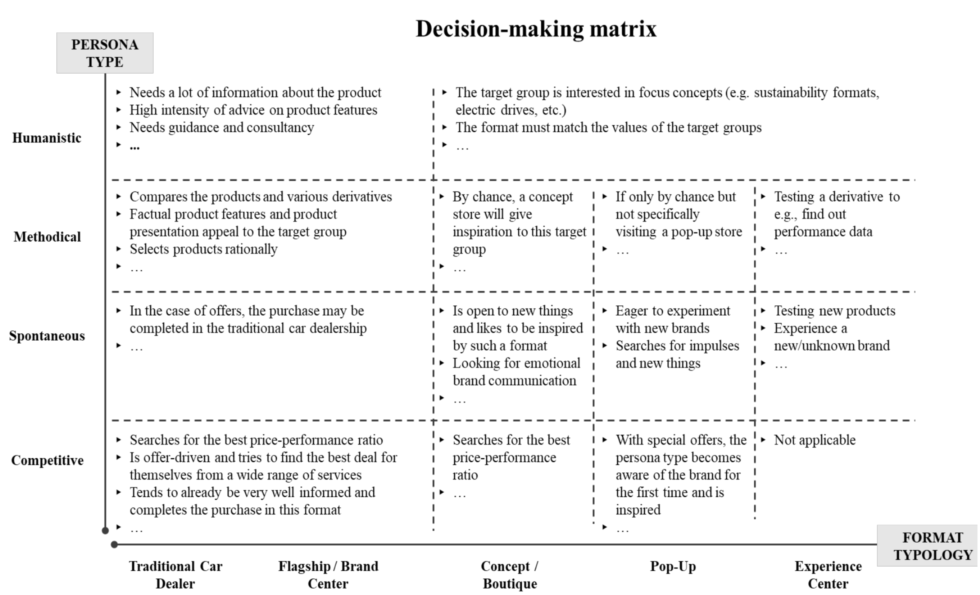

Figure 2. Filled-out decision-making matrix
(Own illustration)

Importantly, this matrix outlines a practical approach that is not limited to the automotive premium sector but can also be applied to other industries within the premium to luxury sector. It is important to note that the research question cannot be fully answered at this stage.

RQ: *Which persona type or automotive customer, in terms of their behavior and needs, can be most effectively mapped to which automotive retail format?*

However, the study does provide preliminary implications that are formulated as hypotheses. These hypotheses will need to be further tested and substantiated through a quantitative study. The initial indications provided serve as a foundation for these hypotheses, but they must be validated through subsequent research. First indications as a baseline for hypotheses (must be proven by further studies):

1. The **humanistic** persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship stores.
2. The **methodical** persona type tends to be addressed by traditional formats such as the traditional car dealership as well as flagship stores.
3. The **spontaneous** persona type tends to be attracted by new urban formats like concept, pop-up, or even more experience-oriented formats.
4. The **competitive** persona type tends to be addressed by traditional as well as new urban formats.

This study specifically focuses on the retail segment, which includes private customers, self-employed individuals, and small commercial customers. It is important to note that this study solely examines sales formats and does not explore after-sales customers, processes, and retail formats. Hence, there are still additional prospects for future research due to the limitations identified in this study. The subsequent step involves conducting a more comprehensive analysis of these findings and initial indications. Specifically, it is necessary to delve deeper into the disparities between the characteristics of a traditional car dealership and a flagship store. A following analysis will provide a more detailed and outlined understanding of these differences.

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