Psyma Digital Index

3rd wave 2024

Find out how digital your audience is and whether you are really taking care of their (digital) needs

Understand your audience(s)

Identify unmet (digital) needs

Improve continuously

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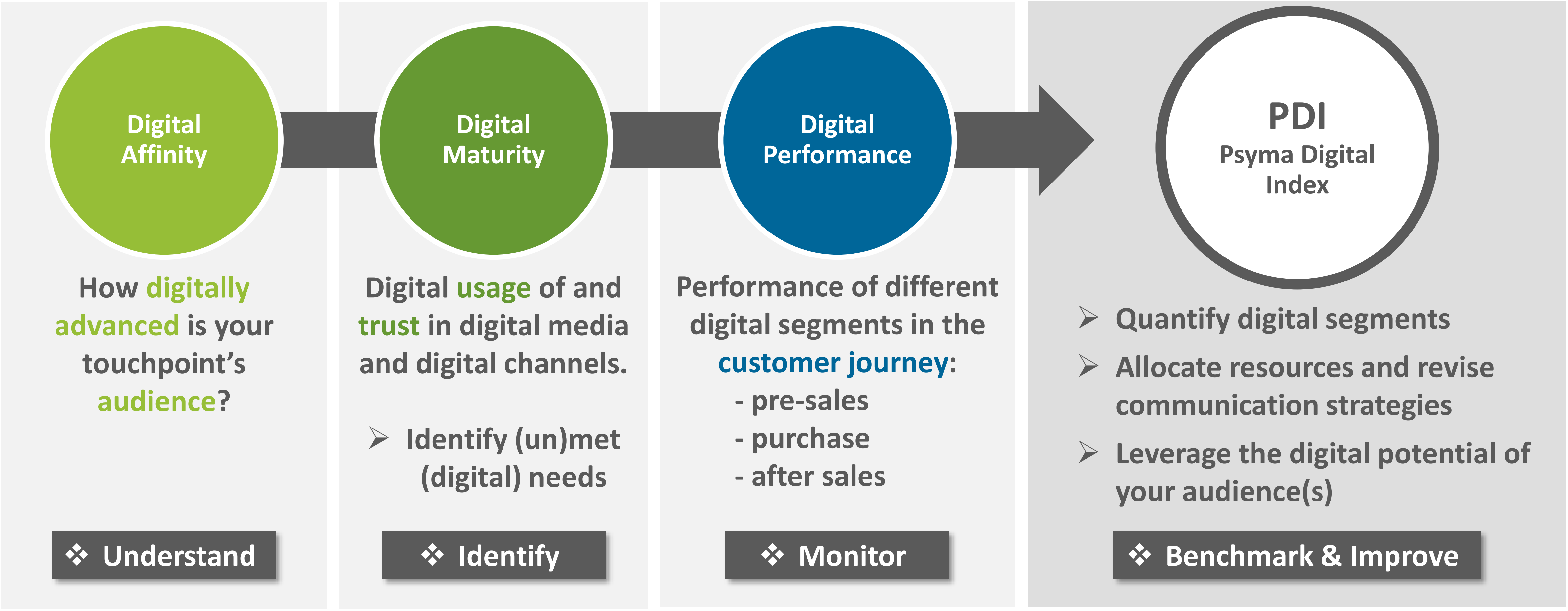
What's the current state of your digital touchpoints?



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What added value does the PDI provide?

PDI
Psyma Digital
Index

❖ **Benchmark & Improve**

- ❖ **High expectations → hard(er) to please.**
- ❖ **Low prior knowledge → even more simplicity needed. Intuitive solving real-life problems helps.**
- ❖ **Low trust in digital media / channels / platforms → more persuasion needed.**
- ➢ Provides insights on how to
  - ➢ **communicate** with different segments / **revise** existing communication.
  - ➢ overcome **potential obstacles** in your digital applications.

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- Overall, ongoing slight improvement of PDI since 2022.
- Driven by increased '*Digital Maturity*', i.e. higher trust and usage of digital channels in comparison to offline channels.
- Digital performance score also slightly enhanced.

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The Typical German Internet User

Psyma Digital Index (PDI)

2022	2023	2024
58,1	59,5	60,2

(Index range 0-100)

Digital Affinity Score

2022	2023	2024
66,3	66,2	65,8

Digital Maturity Score

2022	2023	2024
50,6	54,4	56,4

Digital Performance Score

2022	2023	2024
58,5	58,4	59,1

What's covered?

- Interest in **new digital trends**
- **Sourcing information**
- Affinity for **online transactions / services / activities**
- **Digital** interaction & communication

- **Usage of digital channels** (vs. non-digital).
- **Trust in digital channels** (vs. classical media).

- Usage of pre-sales, sales & after-sales / service tools & channels
- **I.e. how smooth is the current digital customer journey?**

Base: all respondents (W1 (2022): n=1000; W2 (2023): n=908; W3 (2024): n=1012)
=> Results of the regularly conducted study "digital climate" in Germany by Psyma (quota sample: internet representative regarding age, gender, region and level of education)

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- '*Social Networkers*' largest digital segment.
- All other digital segments with equally large proportion across all internet users.

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Psyma Digital Segments – **Cluster analysis** reveals **4 main digital segments**

1 Social Networkers
33

- **High relevance of** and **high trust in social media channels**

3 Website Inquirers
22

- **Predominantly rely on information provided by websites / portals**, e.g. OEM websites, retailer websites, customer portals or marketplaces such as Amazon or eBay

2 Always Digitals
22

- **High digital affinity & proficiency**
- **Frequently purchasing products online (e-sales)**
- **More wary of opportunities & risks**

4 Low Digitals
23

- **High trust in legacy media** such as radio, print newspapers, television
- **Lower usage of online media and e-sales**
- **High relevance** of personal contact (brick&mortar; representatives / agents)

Base: all respondents (W1 (2022): n=1000; W2 (2023): n=908; W3 (2024): n=1012)
=> Segmentation based on Q1, Q2, Q3, Q8, Q11

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- High identifiability of segments.
- No major changes over time.

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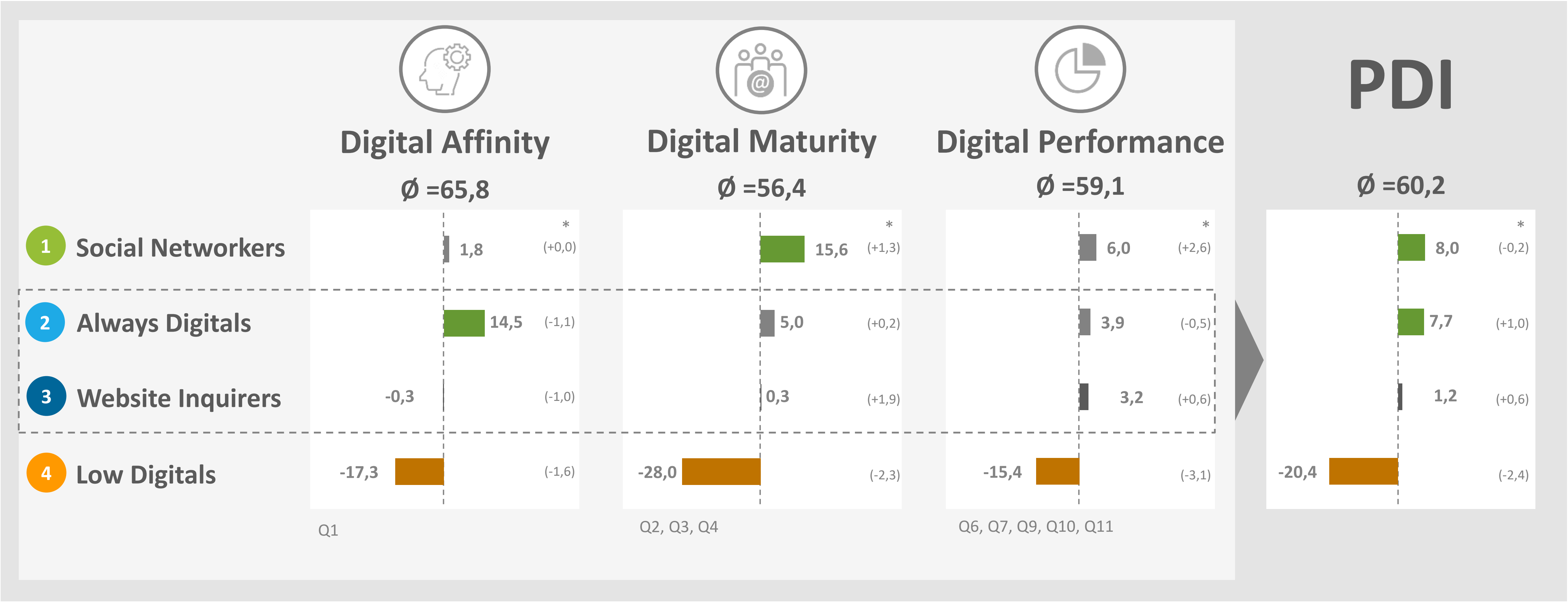
Digital Scores by Digital Segments



Base: all respondents (W3 (2024): n=1012| Proportion of respective cluster within the overall sample)
=> Cluster 1 “Social Networkers”: n=332 / Cluster 2 “Always Digitals”: n=224 / Cluster 3 “Website Inquirers”: n=219 / Cluster 4 “Low Digitals”: n=237 | * Changes vs. previous wave in percentage points.

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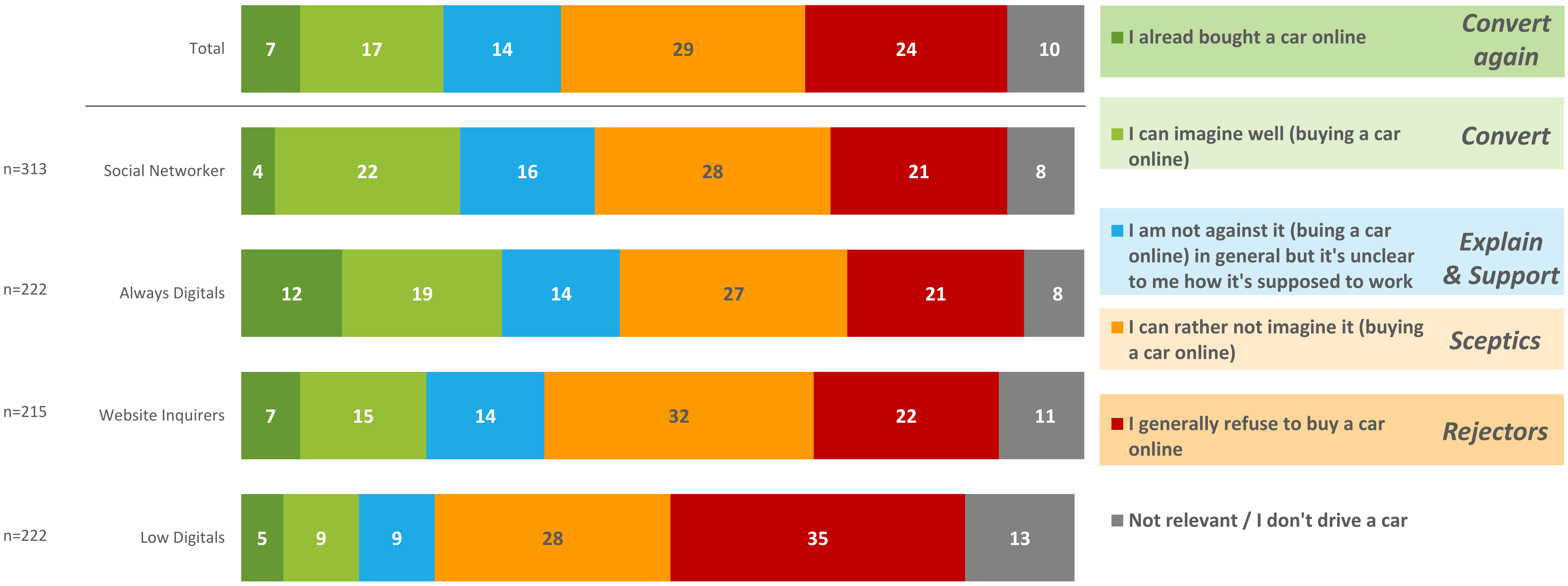
- ‘Always Digitals’ with highest experience & inclination towards online vehicle purchase (new or used).
- As expected, rejectors strong among “Low Digitals”.
- “Website Inquirers” with considerable potential. They are transaction-oriented anyway but need to see purpose & benefits).

Deep Dive: Online Sales Automotive – Overview



AQ1. “What is your attitude to buying a car online?“; Base: all respondents; n=972; single choice; in %

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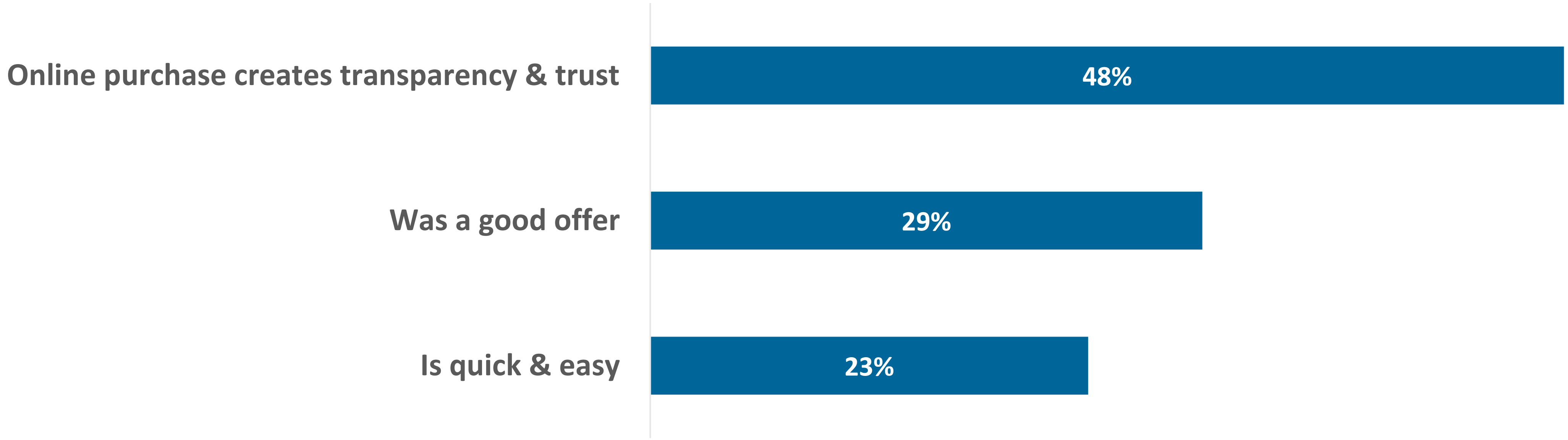
- 7% of German “Onliners” already bought a (new or used) car online.
- For them, **buying online provides more transparency and is more trustworthy**.
- In addition, a **good offer** and **easy transaction facilitated** their online purchase.

Deep Dive: Online Sales Automotive – Reasons for buying cars online

7% “I already bought a car online” → ***Convert again***

“Why have you decided to buy a car online?“



AQ2a_1 + AQ2b_1. Base: n=114; open-ended + Psyma Insight Generator; in %

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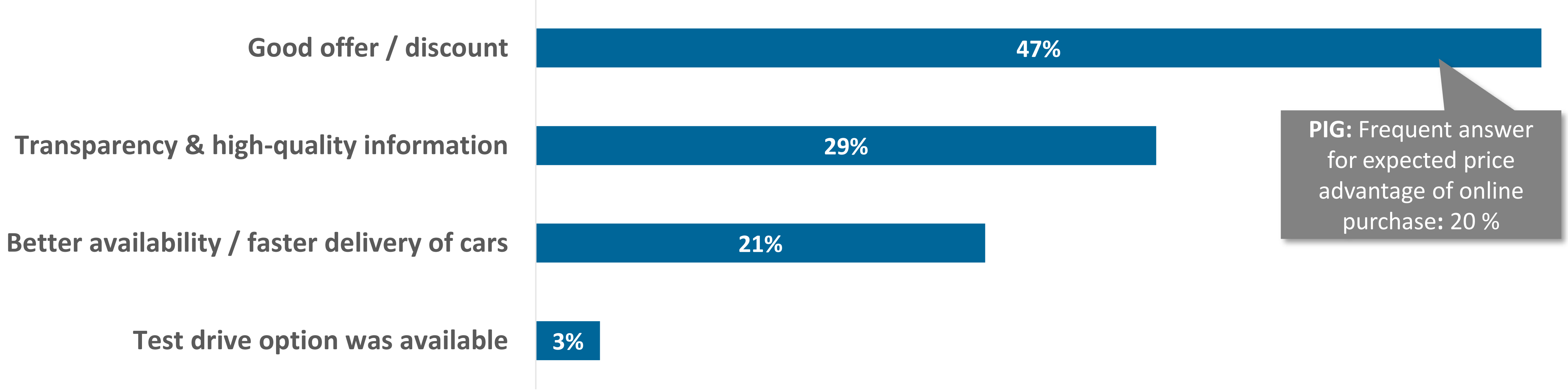
- 17% of German “Onliners” are open to buying a car online.
- This group is comparable to “already bought a car online”, but mainly driven by an **attractive price** (e.g. online discount / online special offer), supported by transparency & proper information (“**Convert**”).

Deep Dive: Online Sales Automotive – Reasons for buying cars online

17% “I can imagine well (buying a car online)” → ***Convert***

“What would make you prefer buying a car online to buying it from a physical dealership?“



AQ2a_1 + AQ2b_1. Base: n=168; open-ended + Psyma Insight Generator; in %

- 14% are not rejecting the idea but are not fully prepared yet.
- Those customers cannot imagine buying a car without a test drive or physical examination. They do not yet have enough trust in online sales of vehicles.

  → Communication goal: Overcome obstacles (“**Explain & Support**”)

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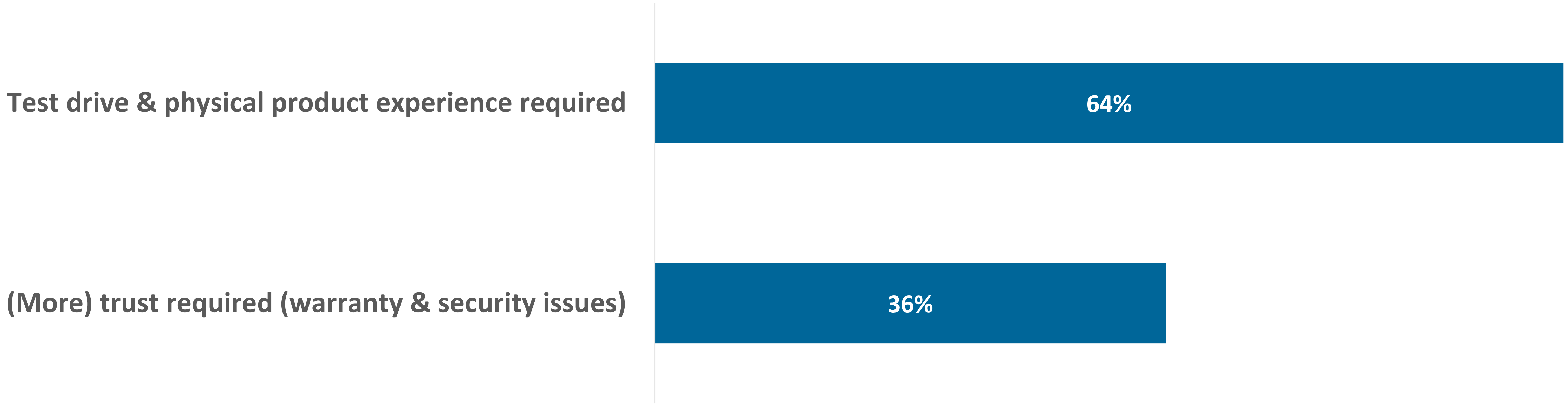
Deep Dive: Online Sales Automotive – Reasons for (not) buying cars online

14% - “I'm not against (buying a car online) in general but it's unclear to me how it's supposed to work” → ***Explain & Support***

“Which aspects are unclear? What do you see as the main obstacle to buying a car online?“



AQ2a_1 + AQ2b_1. Base: n=193; open-ended + Psyma Insight Generator; in %

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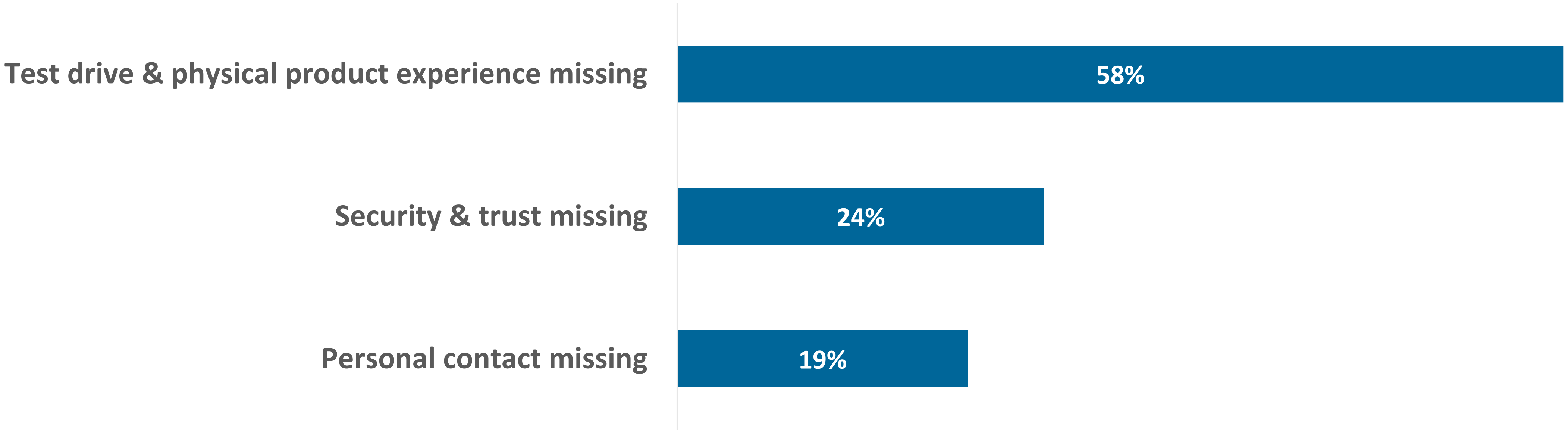
- "**Sceptics**" (29%) are even stronger in their need to (physically) experience the product.
- Additionally, missing trust, e.g. in car specifications & condition, as well as the missing personal contact with a salesperson are reasons for reluctance.

Deep Dive: Online Sales Automotive – Reasons for not buying cars online

29% - "I can rather not imagine (buying a car online)" → ***Sceptics***

"Why can't you imagine buying a car online?"



AQ2a_1 + AQ2b_1. Base: n=602; open-ended + Psyma Insight Generator; in %

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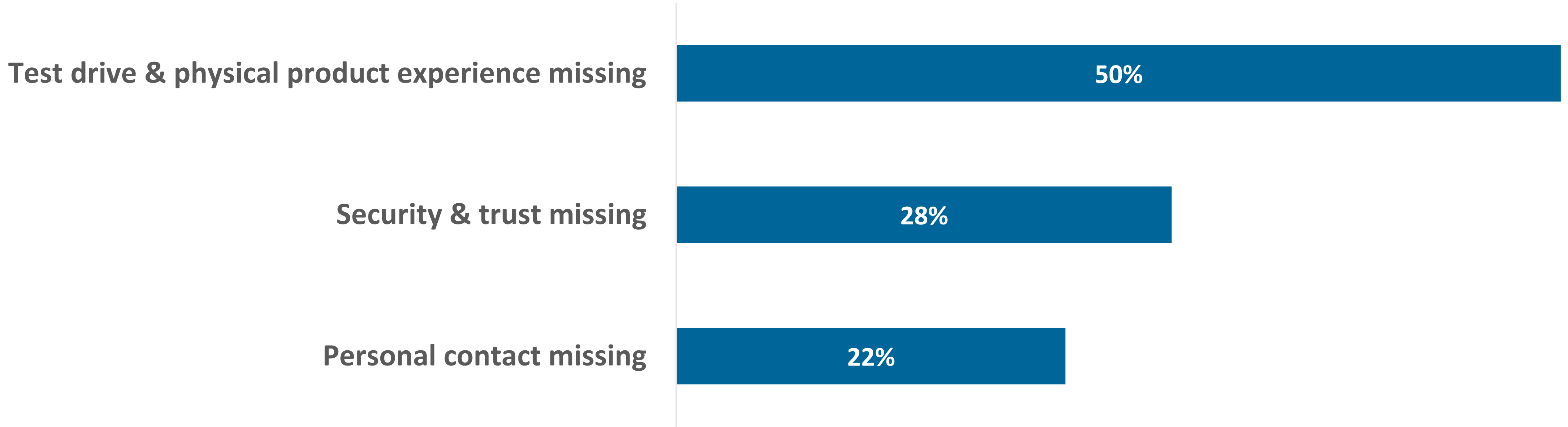
- As “Sceptics”, “**Rejectors**” (24%) have a major need to (physically) experience the product. I.e. reluctance to buy online is a graded approach.

  → At least provide hybrid e-sales approach with e.g. “virtual tours” or “reserve or order online” but definitely allow for a physical dealer / showroom visit.

Deep Dive: Online Sales Automotive – Reasons for not buying cars online

24% - “I generally refuse to buy a car online” → *Rejectors*

“Why do you generally refuse to buy a car online?“



AQ2a_1 + AQ2b_1. Base: n=602; open-ended + Psyma Insight Generator; in %

- There is not one key driver which let Online Shoppers use an app instead of the website version of the online shop, but a mix of different levers.
- Overall, “easier usage /order” (66%), “special offers / discounts” (59%), “faster delivery” (55%) and “broader range of payment options” (53%) with highest relevance.

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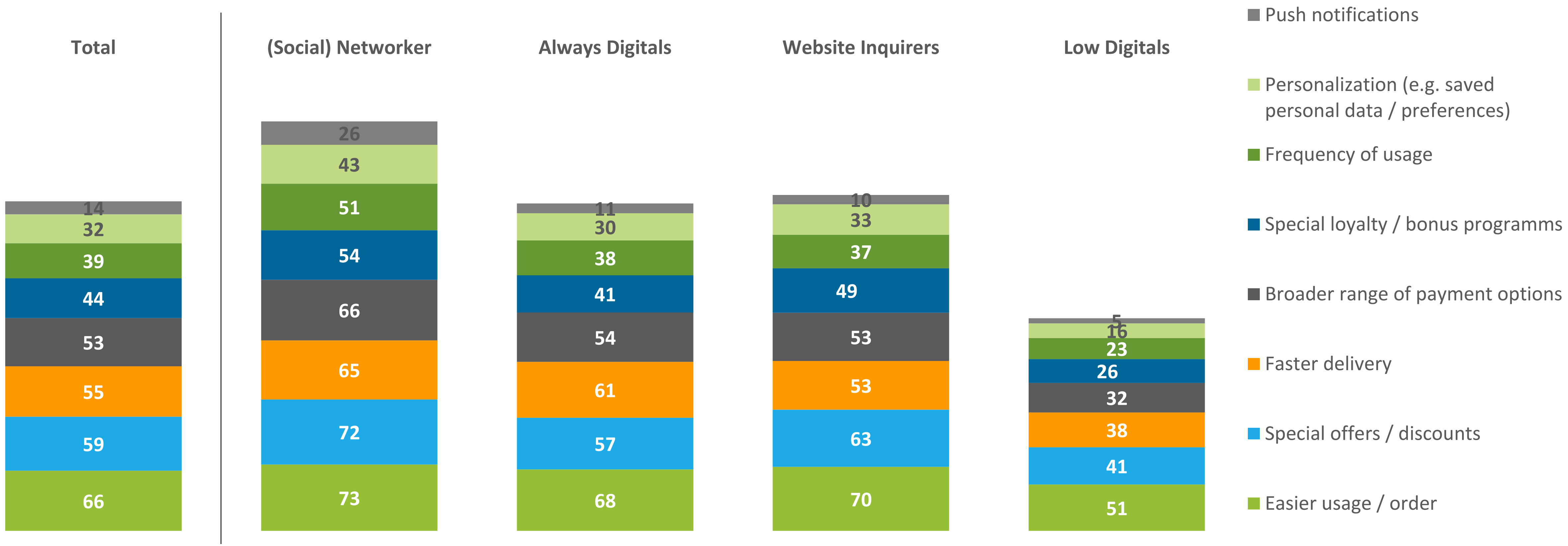
Deep Dive: E-Sales – How to increase App-Usage to enhance Customer Retention & Engagement? – per digital segment



ZF3. “When you shop online, what role do the following aspects play in your decision to use an app instead of a website?” ; Base: all respondents; n=972 (top-2-boxes in %

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How can you benefit from Psyma's insights?

As stand-alone User Survey
Standardized, proven questionnaire.
Flexible recruitment of respondents.

or as

Add-on – Standardized set of items embedded into Psyma's portfolio of **Digital Touchpoint Benchmarking**.
Allows to efficiently quantify digital segments.

Gain user-driven insights for targeted optimization!

- Proven concept
- Real users. Real use cases.
- Independent expertise
- Touchpoint specific recommendations
- Benchmarks & Best Practices

Psyma Touchpoint Benchmarking

Take part in one of our Benchmarking and use the Psyma Quick Personas as Add-on.
(based on Psyma Digital Segments)

Website Benchmarking
- In-depth evaluation & recommendations
- Benchmarks & Best Practice examples

Corporate Website Benchmarking
- In-depth evaluation & recommendations
- Best Practice Index, modular approach

Touchpoints Monitoring
- Monitoring of different touchpoints
- Comparison with standardized set of KPIs

Social-Media Benchmarking
- In-depth evaluation & recommendations
- Best Practice Index, modular approach

Make your target groups visible, quantifiable and approachable.

Interested? Contact us & request advice

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