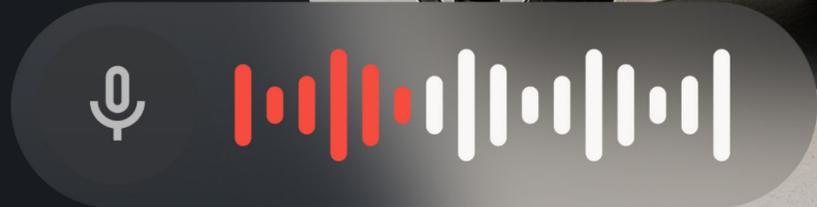


ONLINE.AI

THE CAR-BUYER EXPERIENCE REPORT 2026



Test-Drive Awareness, Friction, and Intent



Customers of the following brands:



01.
EXECUTIVE SUMMARY

02.
ABOUT THE RESEARCH:
WHO WE SURVEYED

03.
SECTION 1: THE
DIGITAL RESEARCH
JOURNEY

04.
SECTION 2: THE TEST
DRIVE GAP

05.
SECTION 3: WHAT
BUYERS WANT

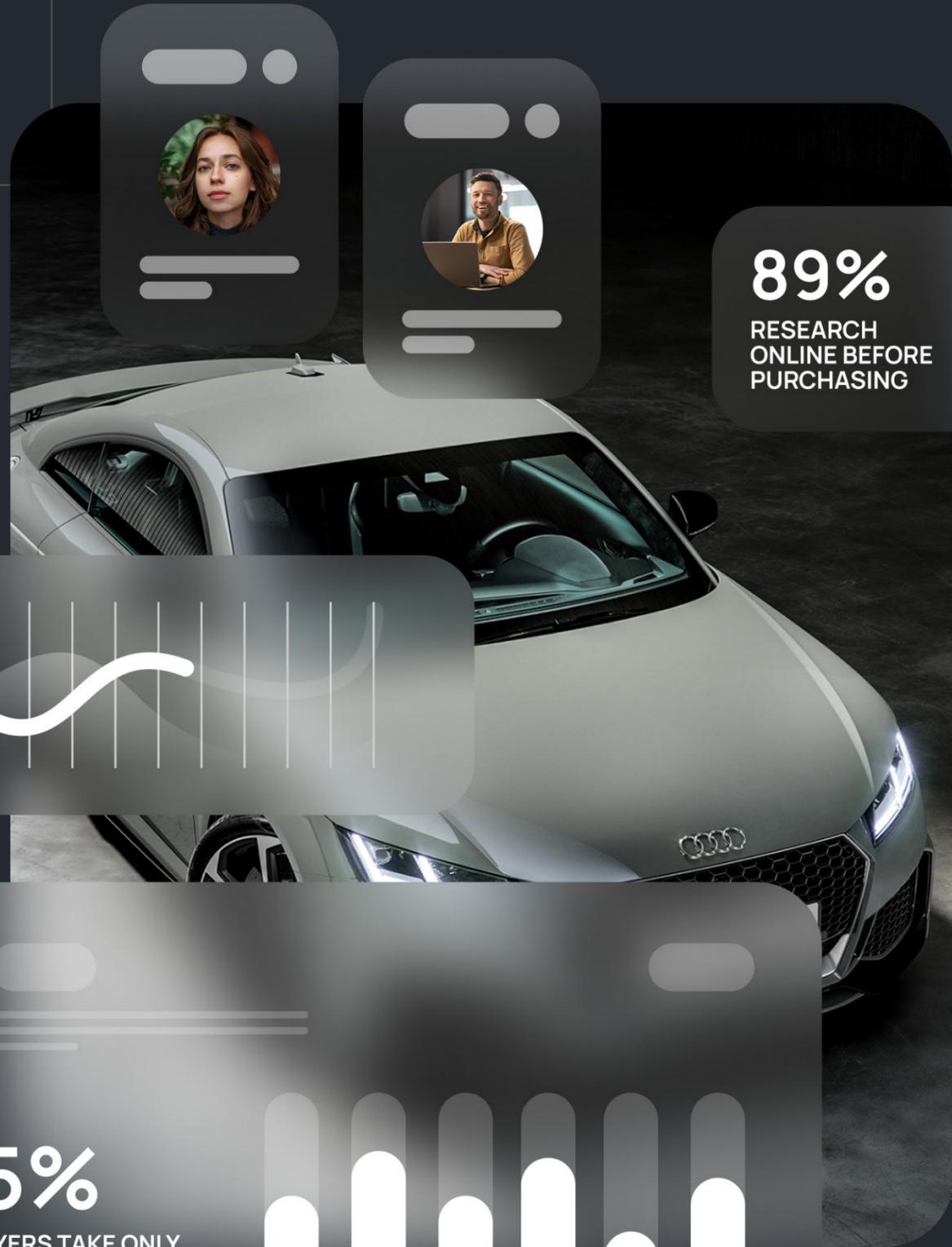
06.
SECTION 4: THE
DECISION MOMENT

07.
CONCLUSION: BRIDGING
THE DIGITAL-PHYSICAL
GAP

08.
HOW ONLIVE.AI
ADDRESSES THESE
CHALLENGES

TABLE OF CONTENTS

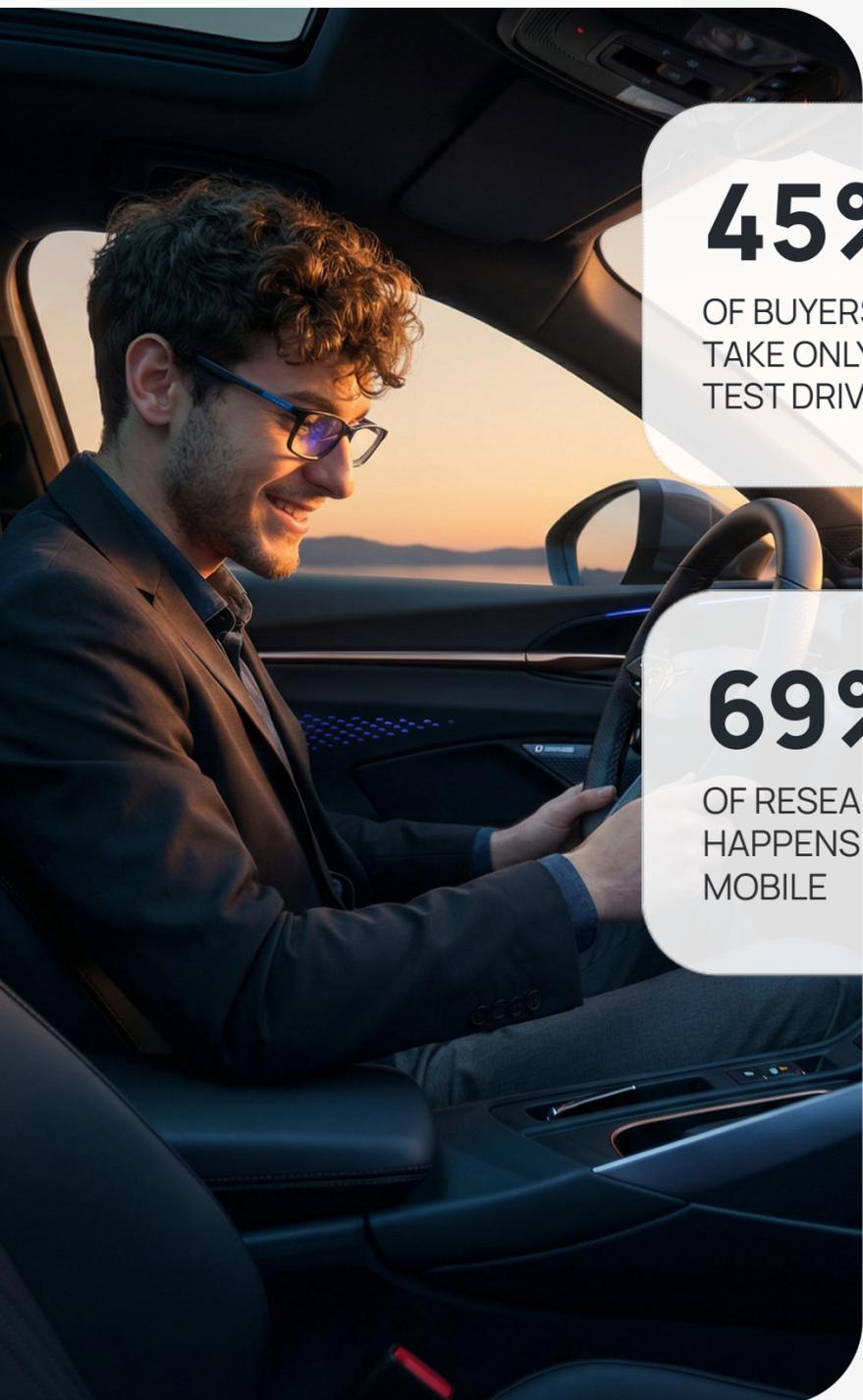
EXECUTIVE SUMMARY



89%
RESEARCH
ONLINE BEFORE
PURCHASING

45%
OF BUYERS TAKE ONLY
ONE TEST DRIVE



**45%**OF BUYERS
TAKE ONLY ONE
TEST DRIVE**69%**OF RESEARCH
HAPPENS ON
MOBILE

The automotive industry stands at a crossroads. Technology in the vehicles themselves has leapt forward—22% of our respondents now drive fully electric vehicles—yet the journey to get behind the wheel often feels stuck in a previous decade.

This research, conducted among 310 car buyers in Germany, set out to examine three dimensions of the modern purchase journey: Awareness, Friction, and Intent. What we found reveals a fundamental tension: consumers have become sophisticated digital researchers (89% research online before purchasing), but when they're ready to move from screen to steering wheel, they encounter

friction that erodes confidence—and costs brands sales.

The stakes are higher than many realize. The test-drive experience ranks as the #2 most influential factor in purchase decisions, second only to price. Yet 45% of buyers take only one test drive, meaning brands get a single chance to convert interest into action. When 59% of bookings still happen via walk-ins or phone calls—while 69% of research happens on mobile—the disconnect is clear.

The barriers are solvable. "No clear availability" is the top friction point. 30% of buyers want to book via WhatsApp or chat tools, yet virtually none currently can. And 58% say a smooth booking process directly increases brand trust.

The opportunity is immediate. Buyers aren't asking for revolutionary change. They want real-time availability, instant expert access, and a seamless bridge from browsing to the driver's seat. The brands that deliver this will capture the intent that others lose to frustration—and in a one-shot environment, that means capturing the sale.

ABOUT THE RESEARCH: WHO WE SURVEYED

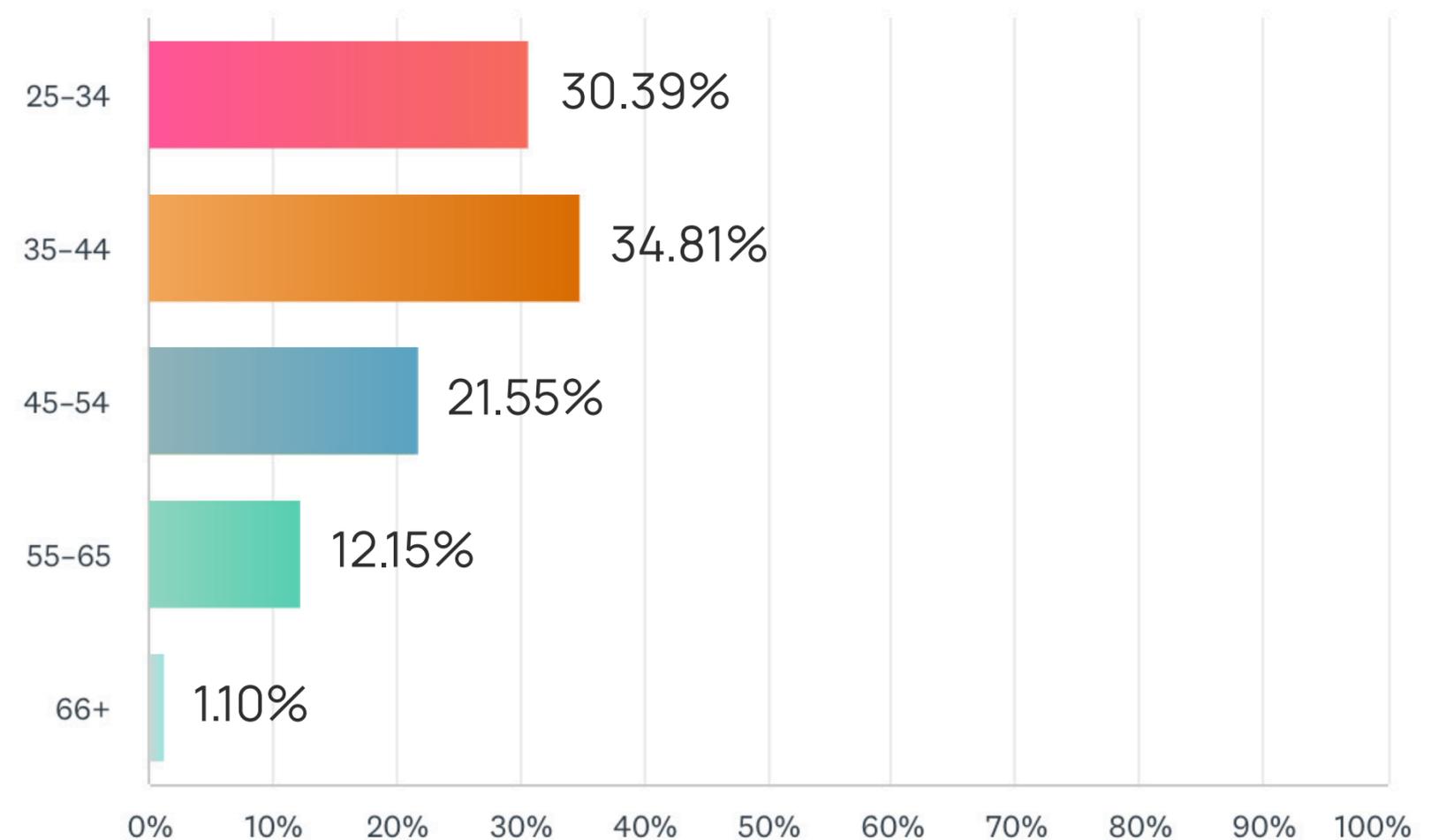
This research was conducted among 310 car buyers in Germany, to understand the friction between digital awareness and physical testing in the modern car-buying journey. The respondent profile represents a mature, high-intent consumer base with established expectations of the purchasing process.



DEMOGRAPHICS AT A GLANCE

Our respondents represent a mature, experienced buying audience. The cohort skews toward millennials and Gen X, with the majority falling into the 35-44 age bracket (35%) and 25-34 bracket (30%). The 45-54 group represents 22% of respondents, while those aged 55-65 account for 12%. Gender representation is balanced, with 53% male and 47% female respondents.

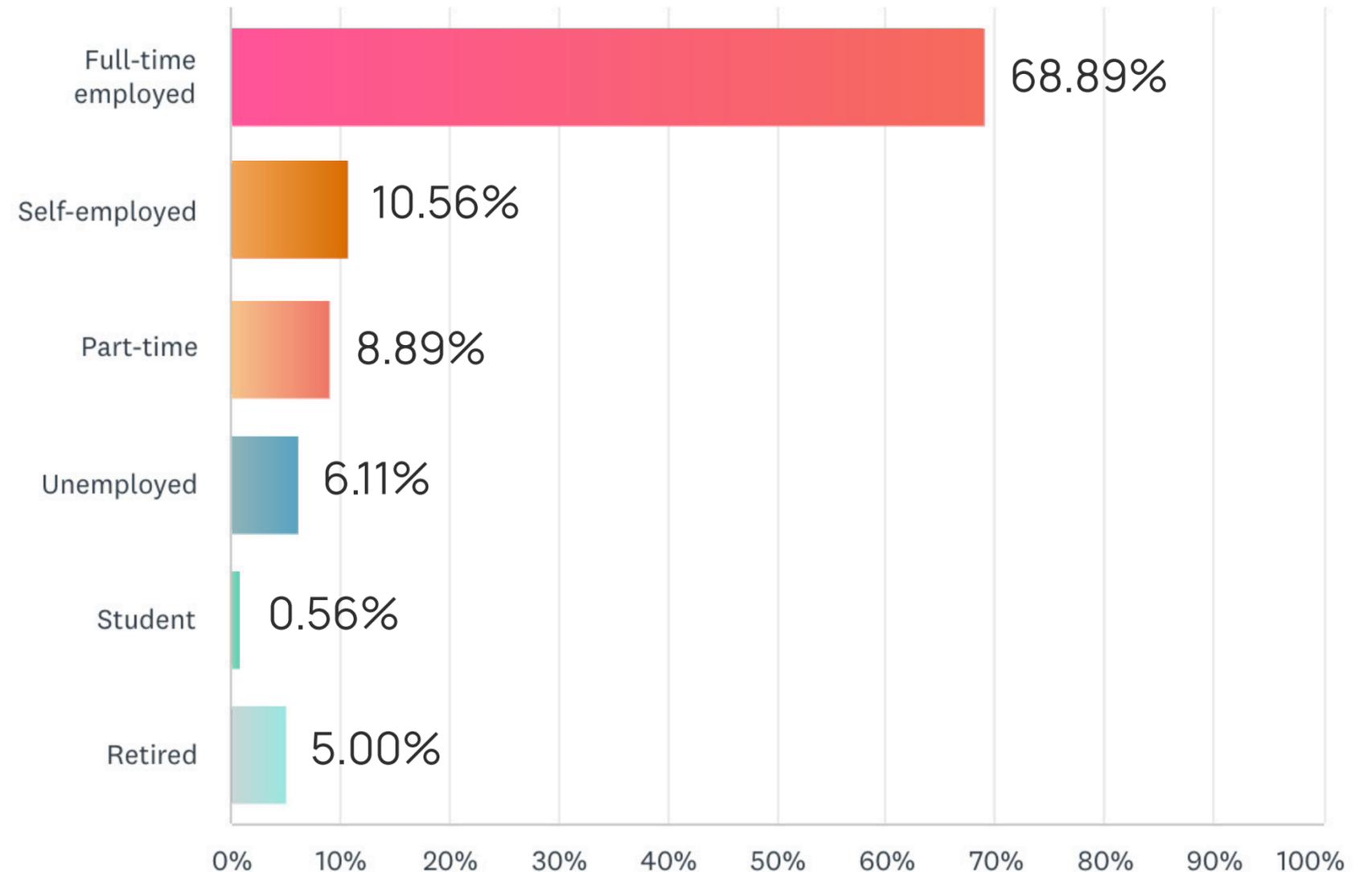
WHAT IS YOUR AGE?



EMPLOYMENT & ECONOMIC PROFILE

This is an economically active audience with strong purchasing power. A decisive **69% are employed full-time**, supplemented by 11% who are self-employed—meaning 80% of respondents are actively earning. Part-time workers (9%), unemployed individuals (6%), and retirees (5%) make up the remainder. With such a high proportion in stable employment, this group represents high-intent prospects that no brand can afford to lose to poor processes.

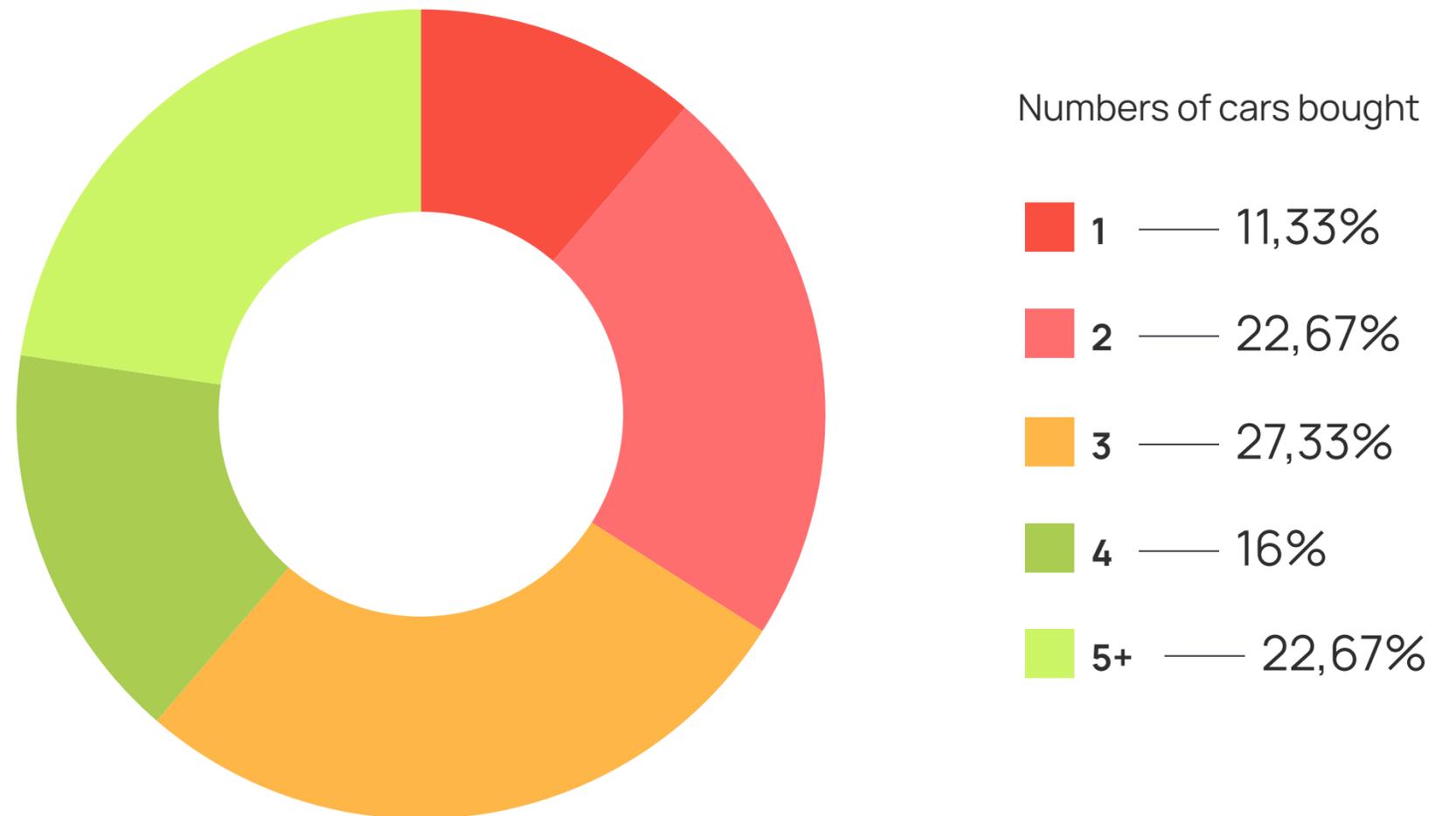
WHAT IS YOUR EMPLOYMENT STATUS?



BUYING EXPERIENCE

Crucially, these are not first-time buyers fumbling through the process. A combined **66% have purchased three or more cars in their lifetime**, with 23% having bought five or more. Only 11% are first-time buyers. This level of experience means respondents arrive with established benchmarks for what a good buying journey looks like—and limited patience for systems that fall short.

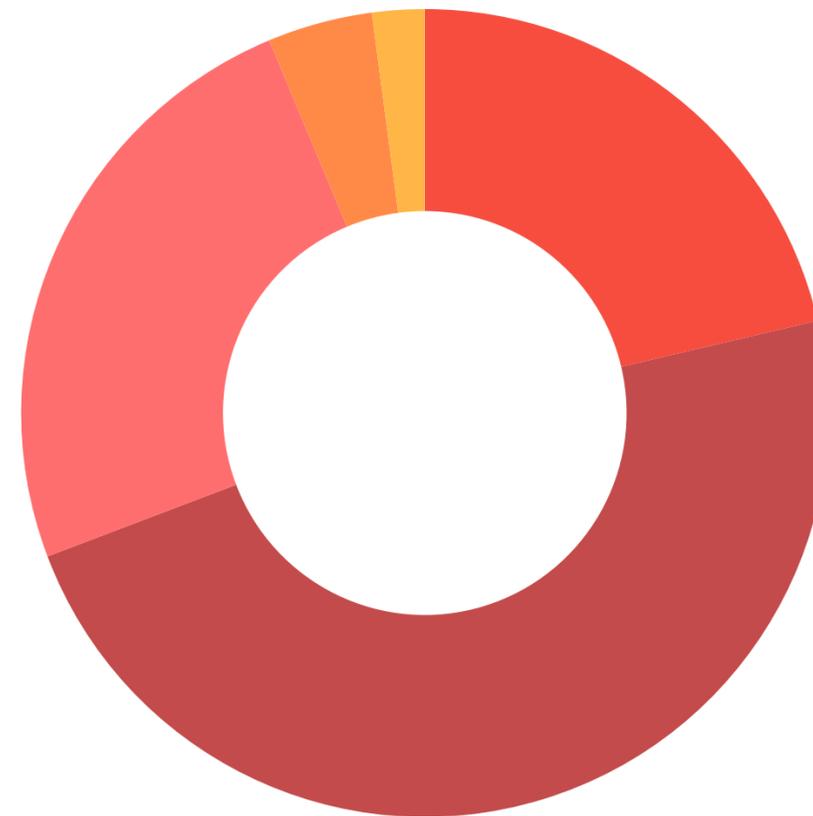
HOW MANY CARS HAVE YOU BOUGHT IN YOUR LIFE?



DEVICE USAGE: A MOBILE-FIRST AUDIENCE

The research phase begins in buyers' pockets. A commanding **69% of respondents used a smartphone** for their car research—48% on Android and 21% on iOS. Just 29% used a desktop or laptop (Windows 24%, MacOS 4%). This mobile-first behavior isn't just a statistic; it's a mandate for mobile-optimized, instant interactions throughout the buying journey.

DEVICE TYPE



iOS Phone / Tablet	21.33%
Android Phone / Tablet	47.90%
Windows Desktop / Laptop	24.48%
MacOS Desktop / Laptop	4.20%
Other	2.10%

WHICH BRANDS THEY PURCHASED

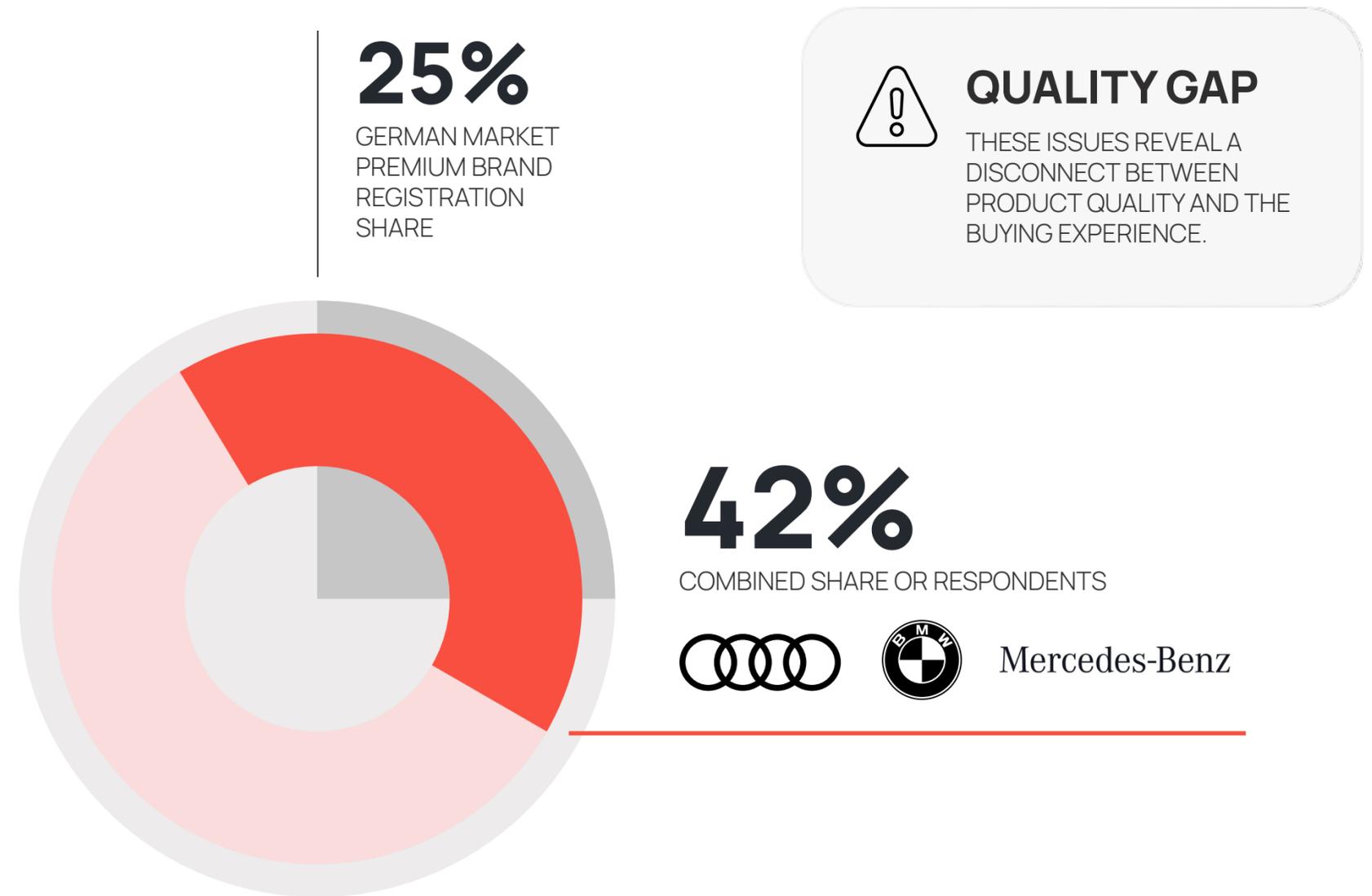
The brand landscape of our survey respondents reveals a distinct skew toward the premium segment.

Audi is the dominant force in this cohort, representing 21% of ownership, almost three times its actual German market share of around 7-8%. Volkswagen follows at 18%, anchoring the volume segment but still under-indexing against its roughly 20% national market share. BMW (12%) and Mercedes-Benz (9%) maintain strong representation, while Tesla captures 5%, significantly outpacing its 1-2% German market share and reflecting a forward-looking, tech-savvy audience that aligns with the high interest in electric vehicles seen elsewhere in the report.



WHY THIS MATTERS FOR THE RESEARCH

This premium skew is meaningful context for the research findings. When Audi, BMW, and Mercedes combined account for 42% of our respondents (versus approximately 25% nationally), we're looking at buyers with higher expectations for seamless, sophisticated experiences and less patience for friction. These are customers accustomed to premium service in every other aspect of their purchase; the test-drive booking process should be no exception. If these buyers, who pay a premium for excellence, are reporting frustration with booking processes or lack of online support, it highlights a glaring gap between the quality of the product and the quality of the buying experience.



SECTION 1

THE DIGITAL RESEARCH JOURNEY



The image shows two overlapping smartphone screens. The left screen features a circular profile picture of a woman with glasses, a rating of 4.7, and a 'QUALIFIED' button. The right screen features a circular profile picture of a woman with a patterned top, a rating of 4.3, and a 'QUALIFIED' button. Both screens have horizontal lines representing text below the buttons.

MOBILE-FIRST, HIGH INTENT, HIGH FRICTION

The modern car buying journey begins in someone's pocket. 69% of respondents used a smartphone (Android or iOS) for their research, compared to just 29% using a desktop or laptop. This isn't just a statistic, it's a mandate for mobile-optimized, instant interactions.

The good news: 89% confirmed they researched online before buying, and their general sentiment toward this research phase is positive, 75% rated it "Positive" or "Very Positive".

But beneath this surface satisfaction, frustrations simmer.

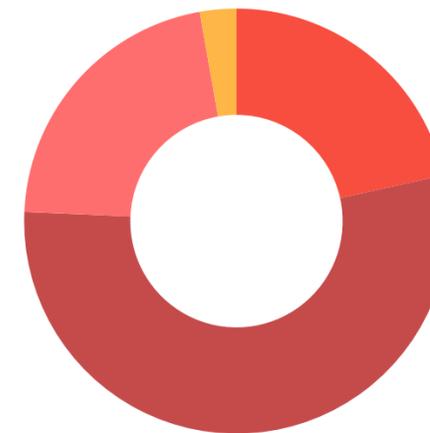
BEFORE
BUYING, DID
YOU RESEARCH
THE CAR
ONLINE?



Yes — 88,67%

No — 11,33%

HOW WOULD
YOU DESCRIBE
YOUR LAST
ONLINE
CAR-RESEARCH
EXPERIENCE?



Very positive — 21,53%

Positive — 54,17%

Neutral — 21,53%

Negative — 2,78%

When asked what frustrated them most:

18%

COULDN'T REACH A REAL PERSON
WHEN THEY HAD QUESTIONS

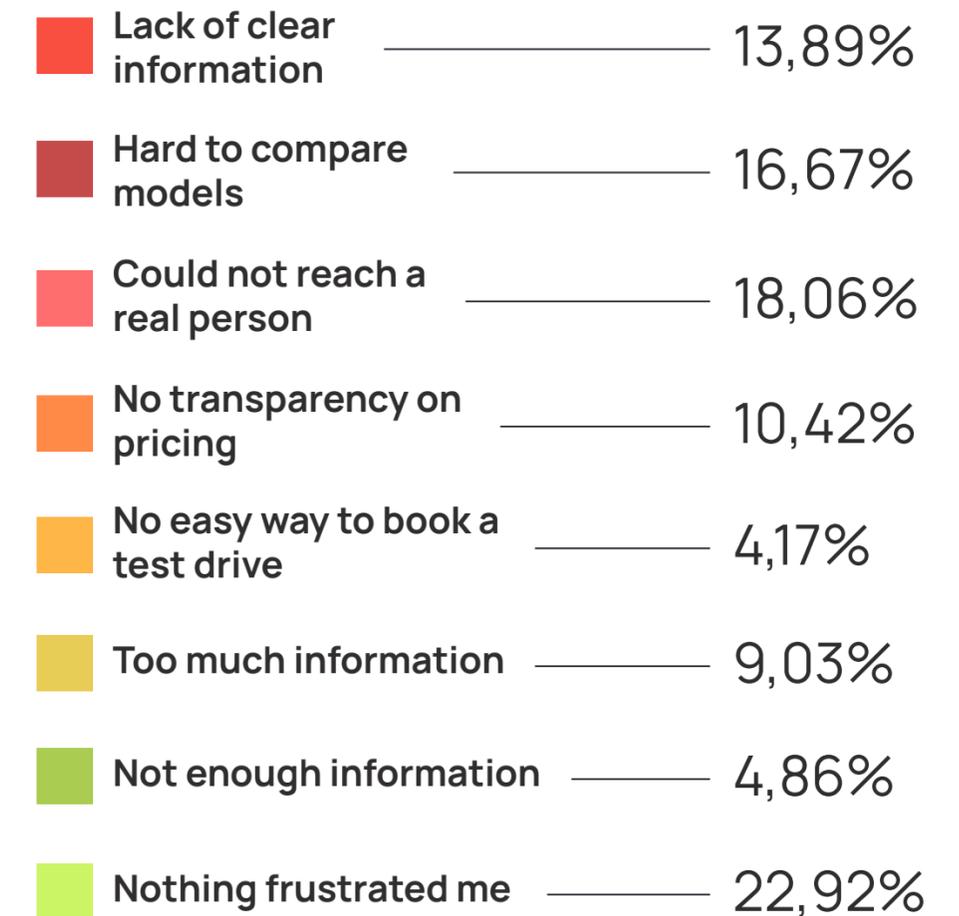
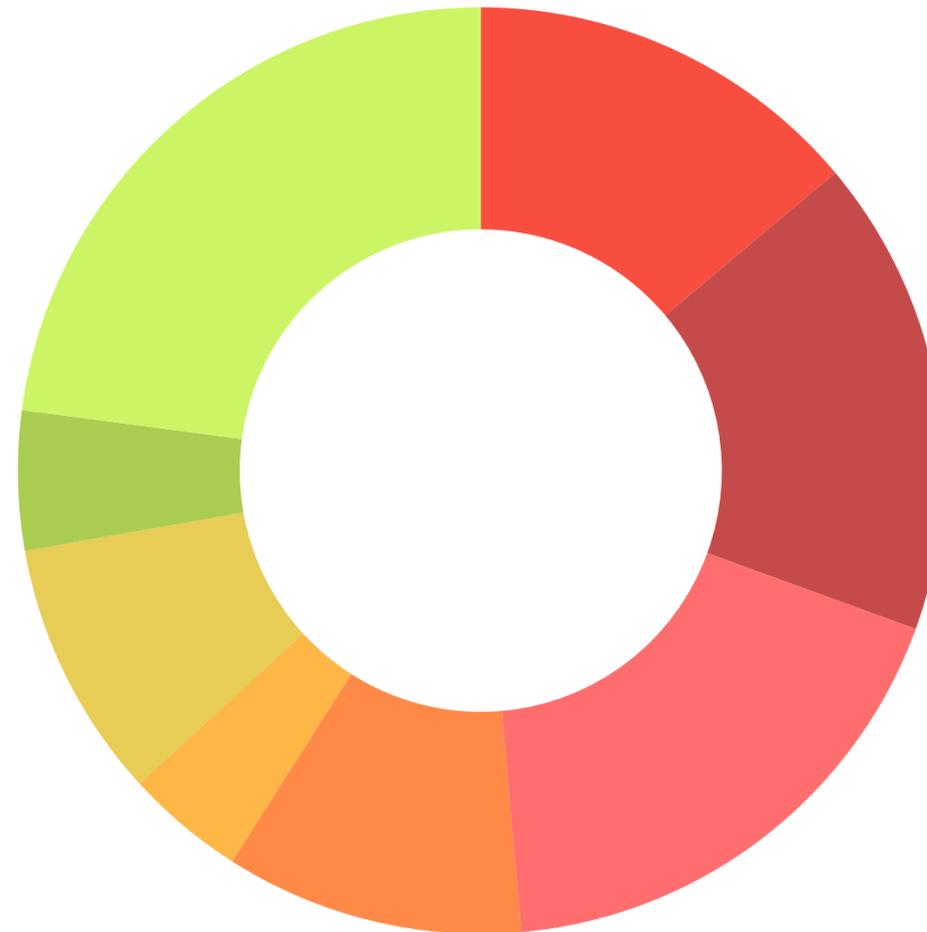
17%

FOUND IT HARD TO COMPARE
MODELS EFFECTIVELY

14%

STRUGGLED WITH UNCLEAR
INFORMATION

WHAT FRUSTRATED YOU MOST ABOUT RESEARCHING A CAR ONLINE?



THE SUPPORT GAP

When we group the frustrations around connection and clarity, a troubling pattern emerges: nearly 32% of users feel isolated during the research phase, lacking the human guidance necessary to make a confident decision.

This is the hidden cost of under-resourced digital channels. A third of your potential buyers are wandering through your website, unable to get the help they need, wondering if anyone's home.



NEARLY

32%

OF USERS FEEL
ISOLATED DURING
THE RESEARCH
PHASE

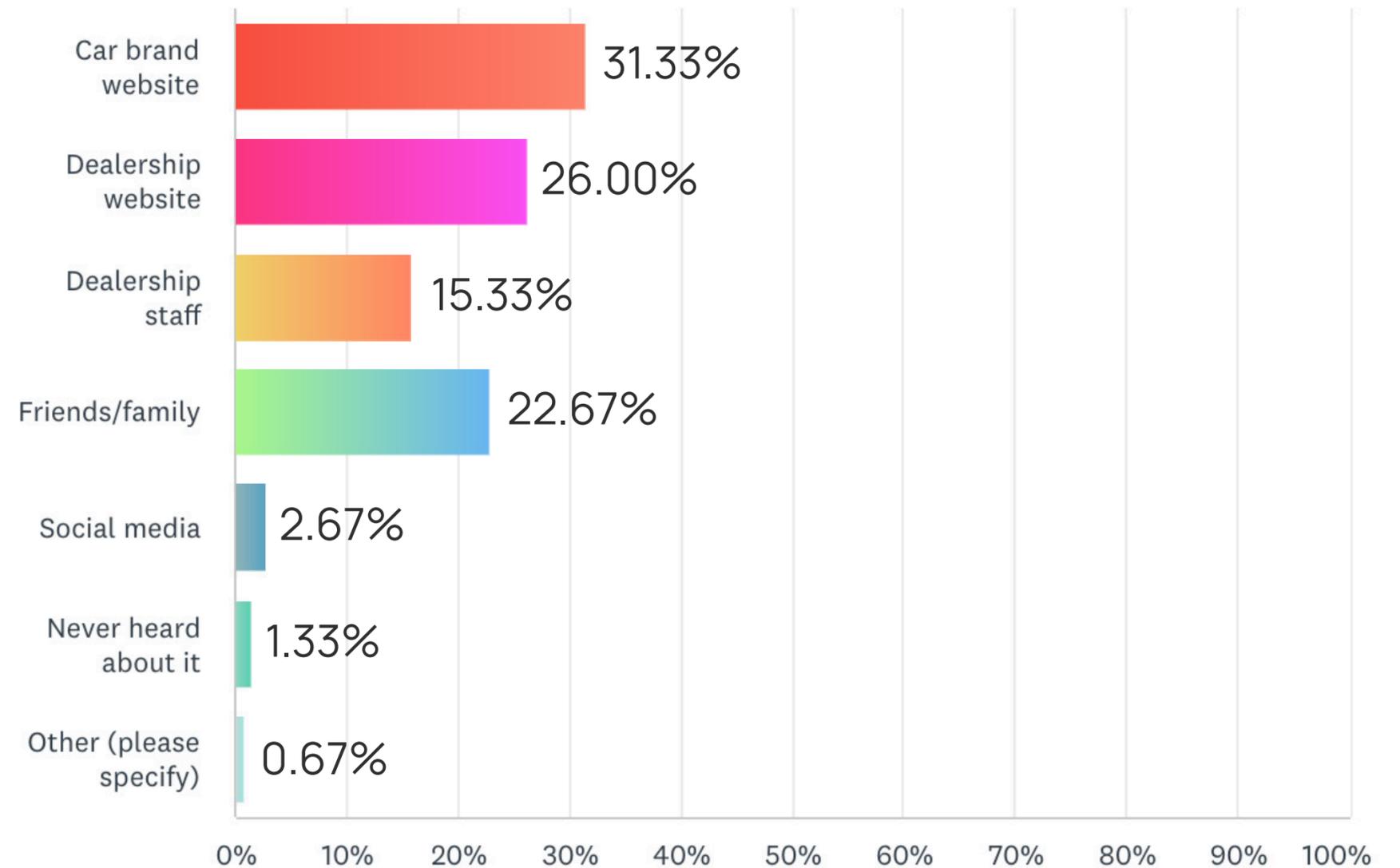


WHERE DISCOVERY HAPPENS

Buyers look to the brand for information about test drives. When asked where they learned test drives were available: 31% cited the car brand website, 26% the dealership website, and 23% learned via friends and family. Only 15% learned from dealership staff directly.

The message is clear: the discovery phase is predominantly digital and independent. By the time a buyer speaks to staff, they've already done their homework. The question is whether your digital presence gave them the answers (and the path forward) they needed.

WHERE DID YOU LEARN THAT TEST DRIVES WERE AVAILABLE?



SECTION 2

THE TEST DRIVE GAP



Book a test
drive now!

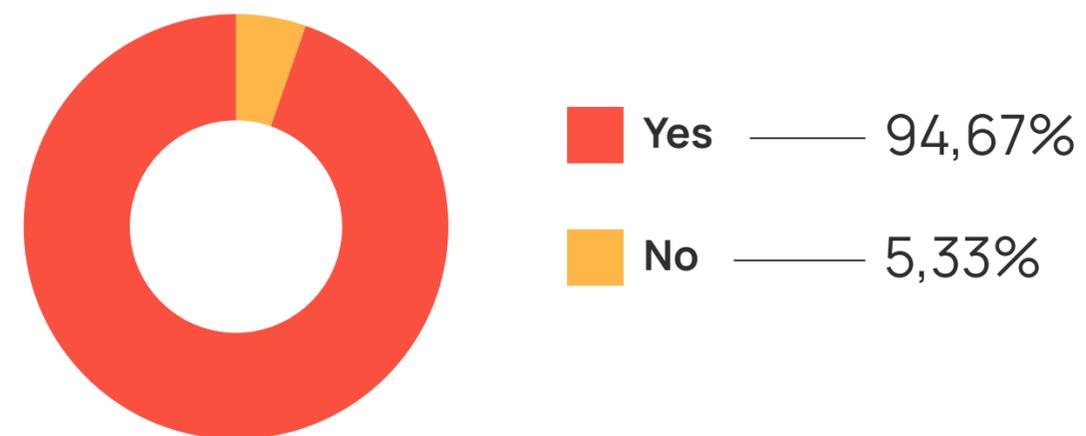


AWARENESS IS NOT THE ISSUE. BOOKING IS.

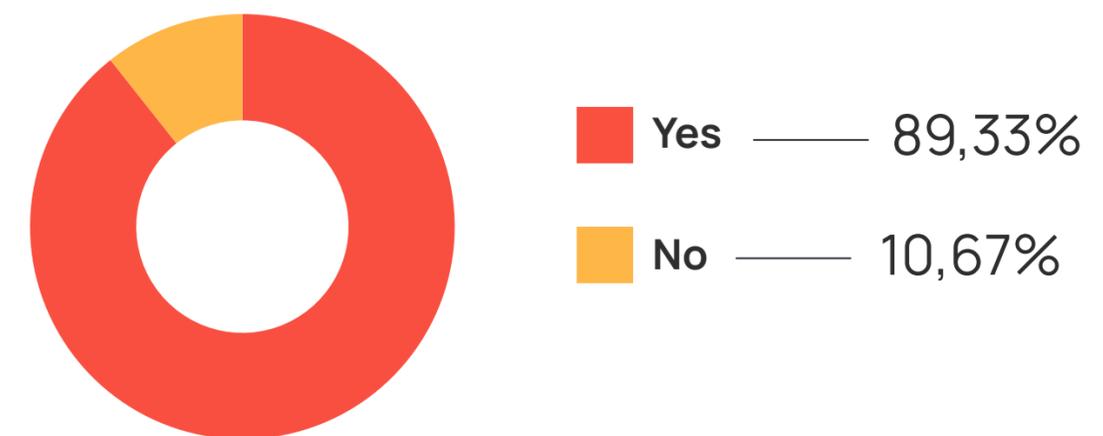
Let's dispel one myth immediately: buyers know test drives exist. 94.7% are aware they can test drive before purchasing. And they value them, 89.3% test-drove before their most recent purchase.

The problem isn't awareness. It's activation.

DID YOU KNOW THAT YOU CAN TEST DRIVE A CAR BEFORE BUYING IT?



DID YOU TEST DRIVE A CAR BEFORE BUYING YOUR MOST RECENT VEHICLE?

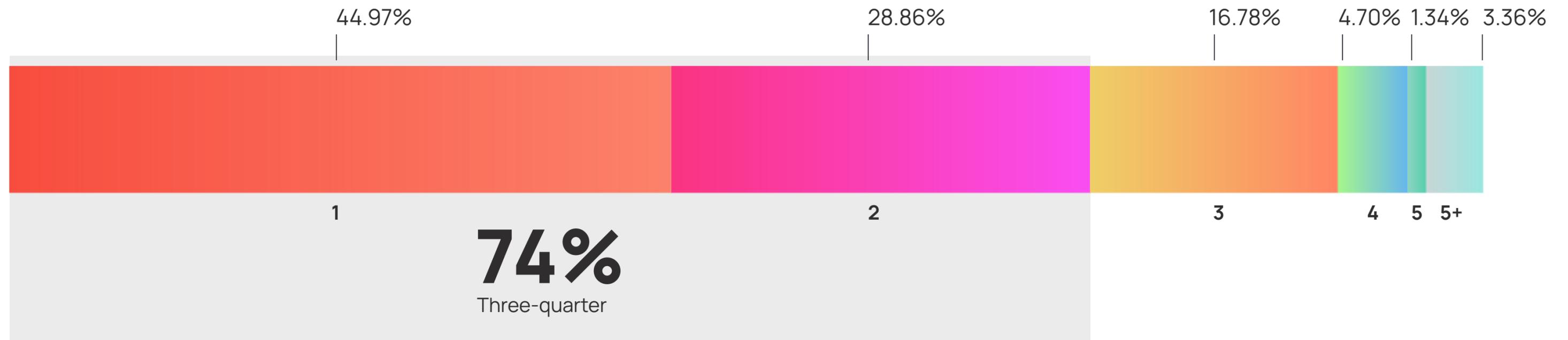


THE "ONE-SHOT" REALITY

Here's what keeps seasoned automotive marketers up at night: **45% of buyers only took ONE test drive**. Another 29% took just two. That means nearly three-quarters of your potential customers give you one, maybe two chances to impress them.

If your booking process fails: if slots aren't visible, if confirmation never arrives, if the customer bounces, there is rarely a second chance. They've moved on to the competitor whose website worked.

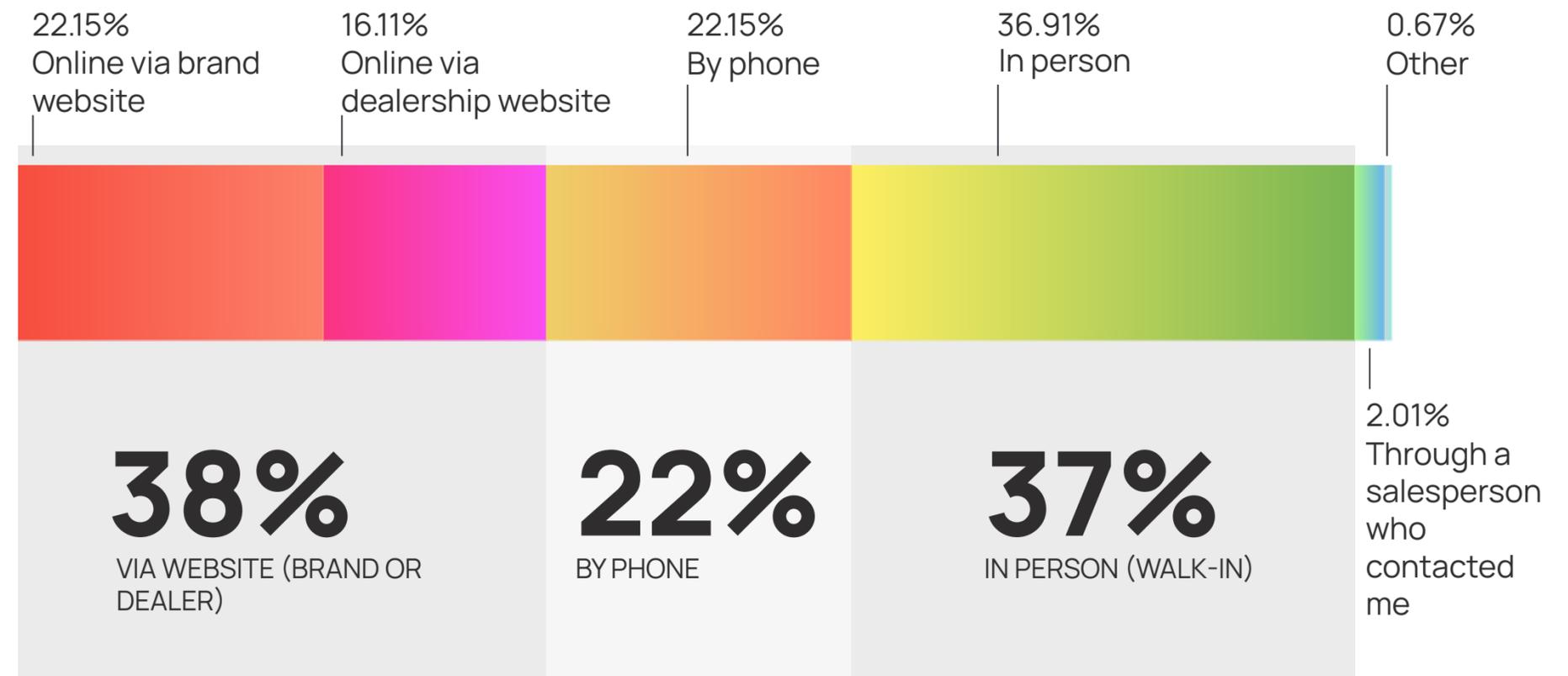
HOW MANY TEST DRIVES DID YOU DO?



THE CHANNEL CONFLICT: WHERE PREFERENCE MEETS REALITY

A significant friction point emerged when we compared how users actually booked their test drives versus how they wanted to book.

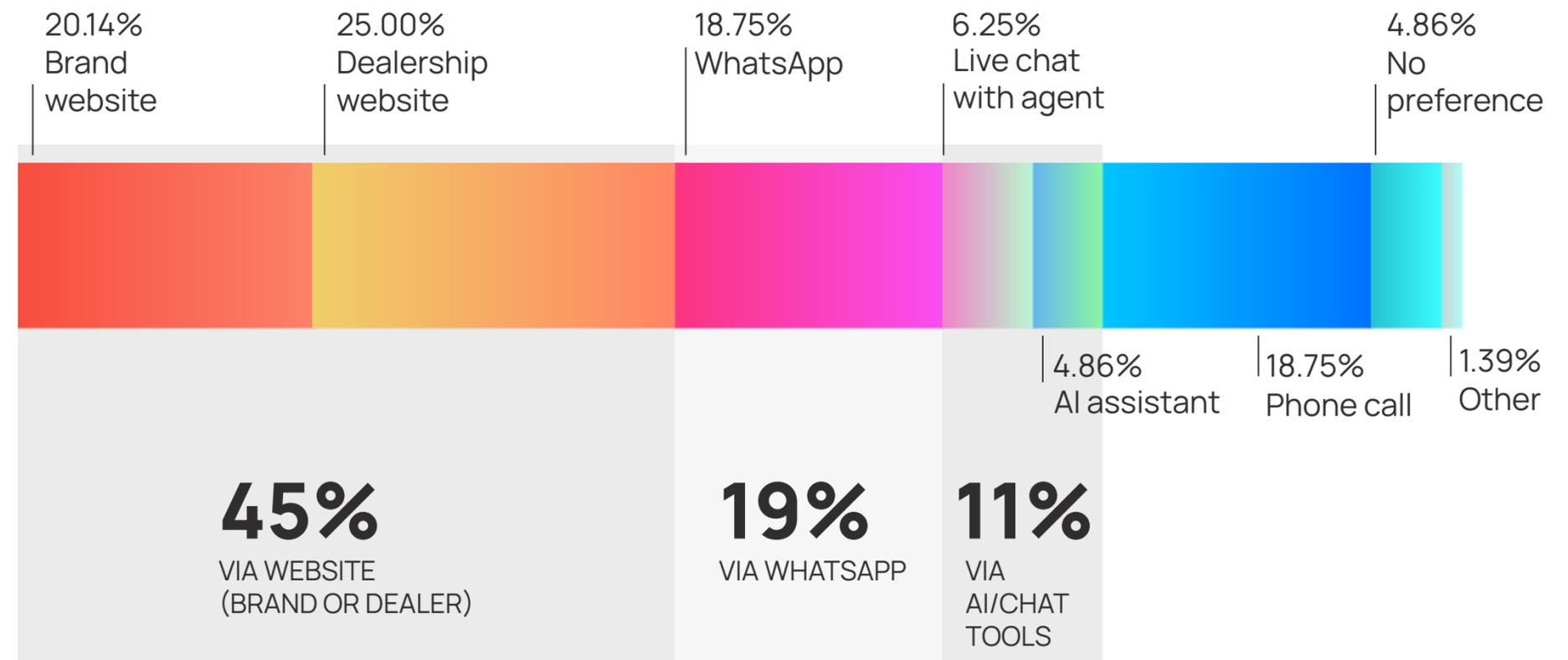
HOW DID YOU BOOK THE TEST DRIVE?



HOW THEY WANT TO BOOK:

The insight: There's a massive gap in modern communication channels. While **30% of users want to book via chat apps or AI assistants**, virtually none are currently doing so. Instead, they're forced into high-friction offline channels (phone calls, physical visits) that don't match their mobile-first research behavior.

HOW WOULD YOU PREFER TO BOOK A TEST DRIVE?



BARRIERS TO BOOKING

For those who hesitated or faced friction, the barriers ranked by severity (weighted average out of 5):

#1

NO CLEAR AVAILABILITY
(3,16)

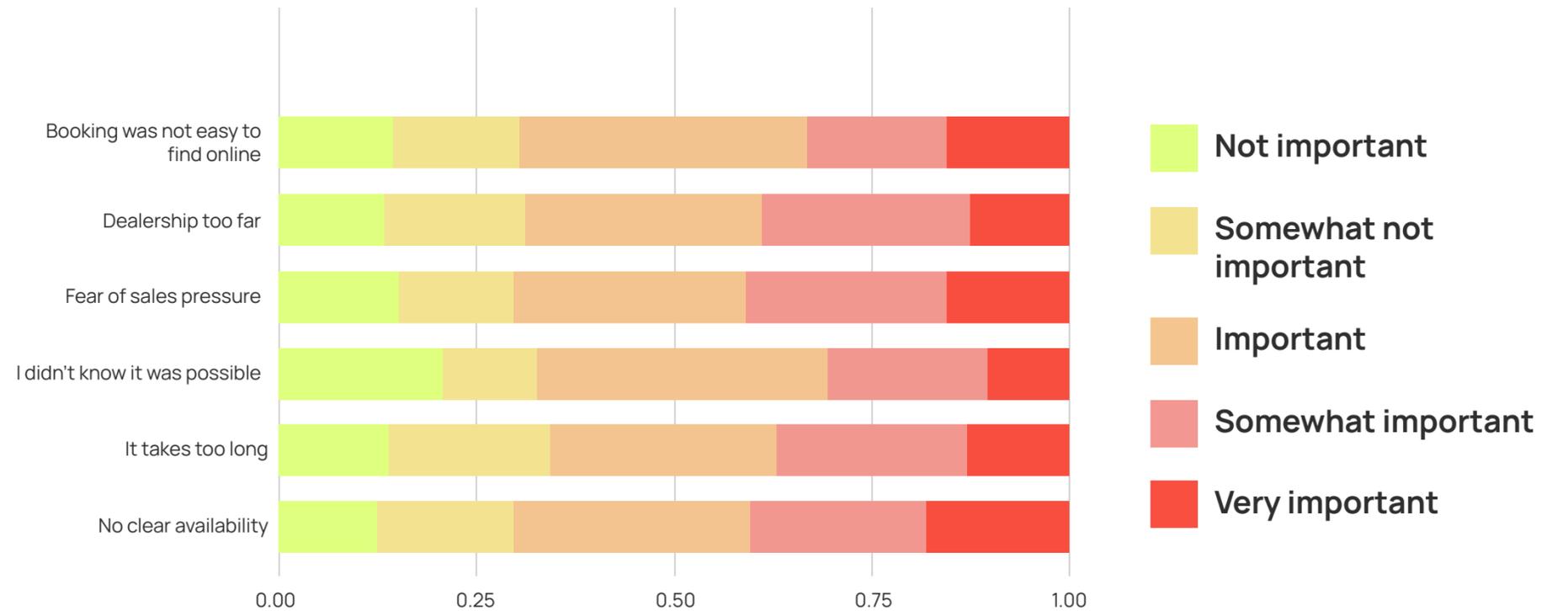
#2

BOOKING WAS NOT EASY TO FIND ONLINE
(3.03)

#3

IT TAKES TOO LONG (3.01)

IMPORTANCE OF TEST-DRIVE FRICTION POINTS



Even among the 10% who skipped the test drive entirely, 15.7% cited "Couldn't find availability" and 13% said "It seemed complicated" or "Dealership was too far." Friction isn't just an inconvenience—it's actively causing lead leakage.

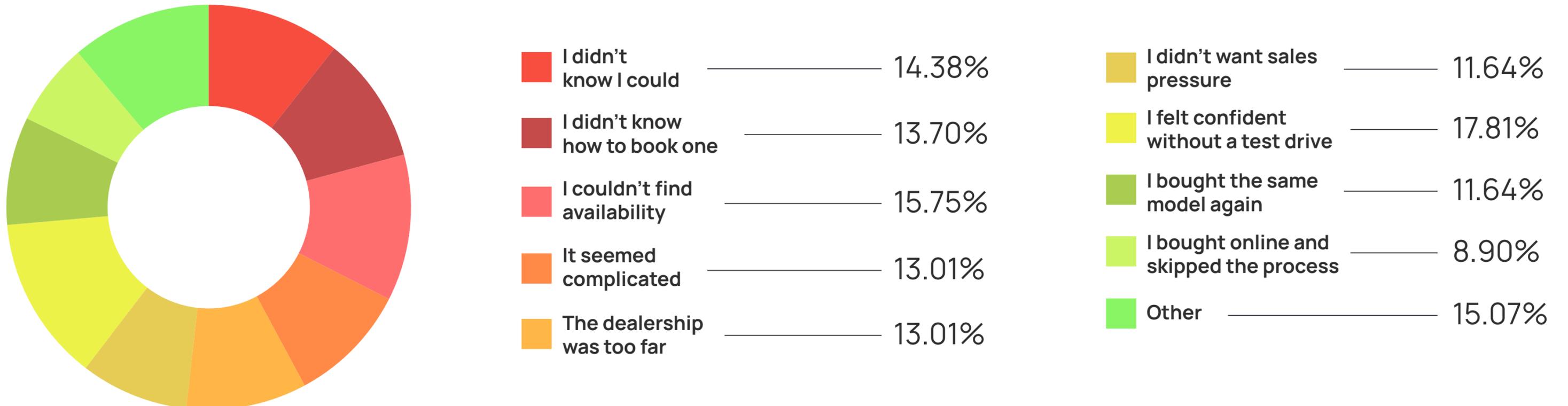
15.7%

CITED "COULDN'T FIND AVAILABILITY"

13%

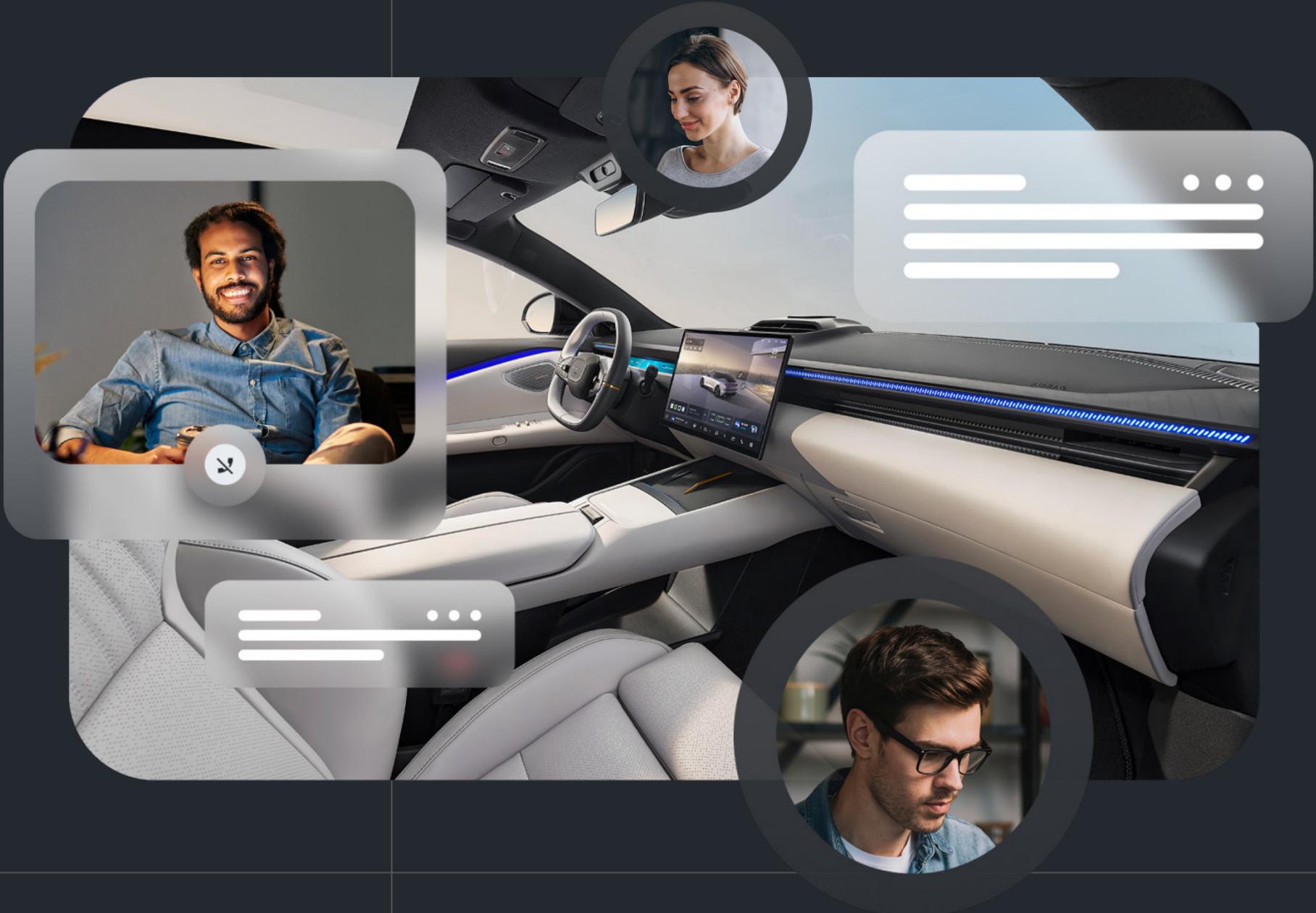
SAID "IT SEEMED COMPLICATED" OR "DEALERSHIP WAS TOO FAR"

WHY DIDN'T YOU TEST DRIVE BEFORE BUYING?



SECTION 3

WHAT BUYERS WANT



THE DEMAND FOR REAL-TIME AND EXPERT INTERACTION

We asked respondents what features would make them more likely to book a test drive. The results point unambiguously toward immediacy and convenience:

Grouping the desire for "real-time availability" and "instant confirmation" reveals that 40% of customers prioritize speed and certainty above all else. They want to know now if they can drive then.



29%

WANT REAL-TIME AVAILABILITY

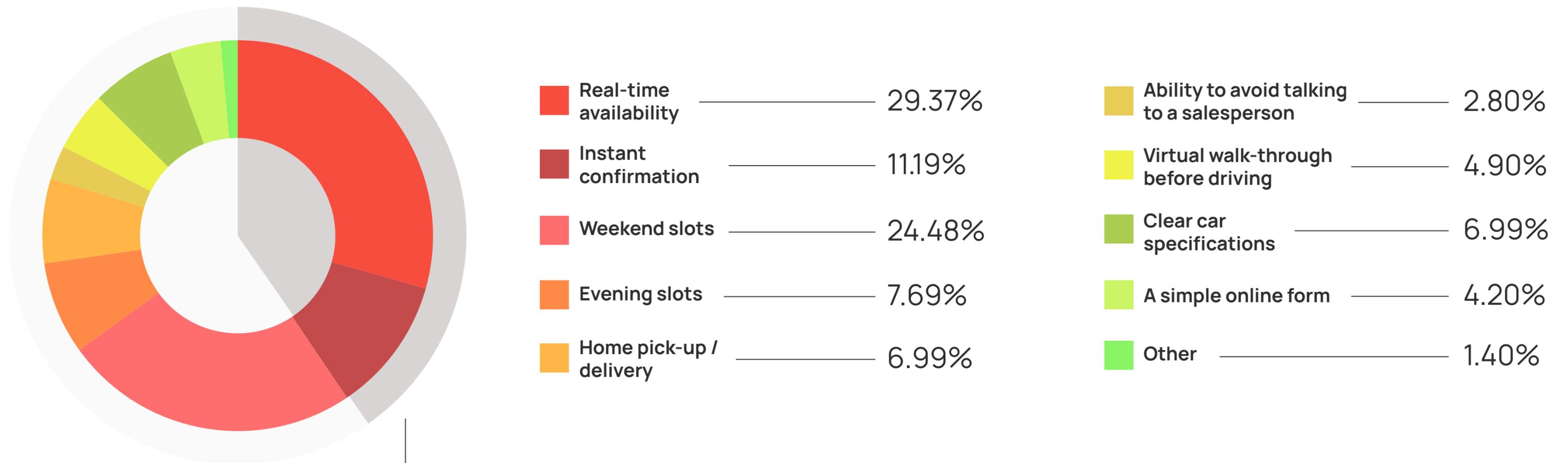
24%

WANT WEEKEND SLOTS

11%

WANT INSTANT CONFIRMATION

WHICH FEATURES WOULD MAKE YOU MORE LIKELY TO BOOK A TEST DRIVE?



40%

OF CUSTOMERS PRIORITIZE SPEED AND CERTAINTY ABOVE ALL ELSE.

THE IMPACT ON TRUST

Process quality isn't just operational, it's brand-defining. When asked to agree or disagree with key statements:

58%

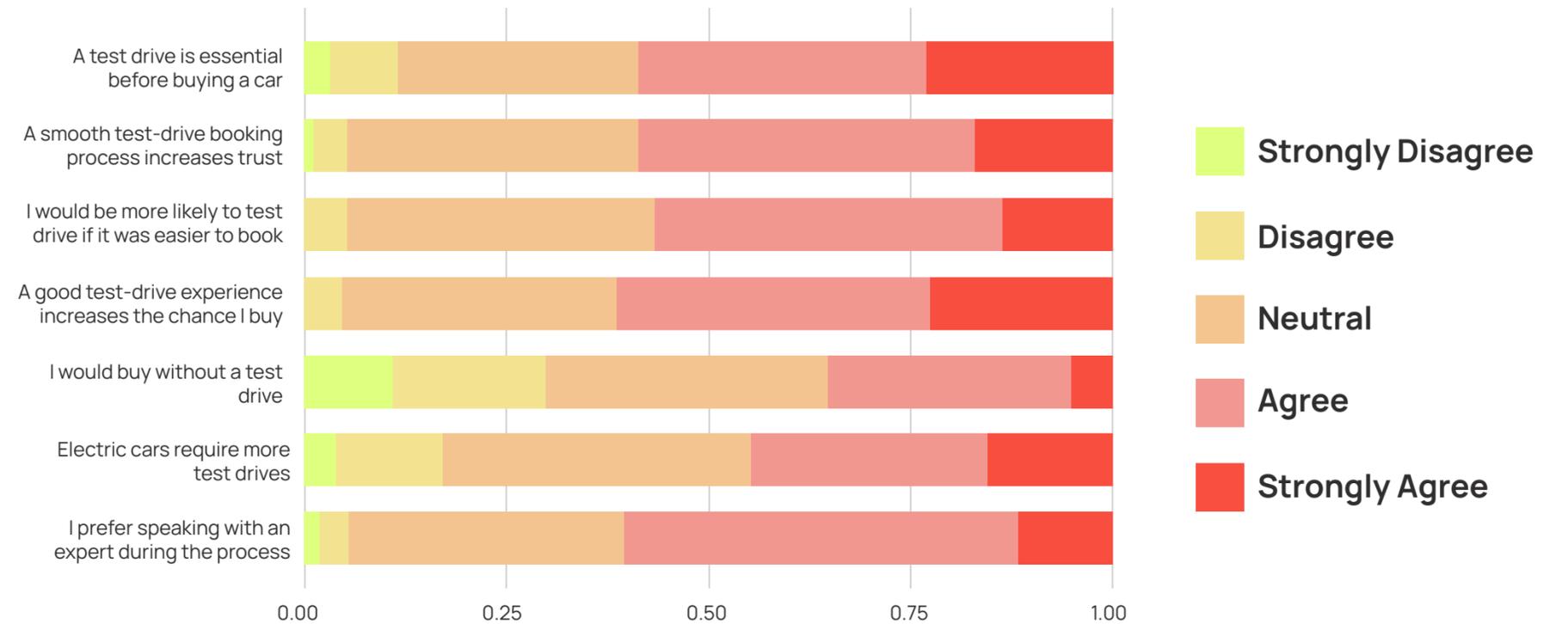
AGREED THAT "A SMOOTH TEST-DRIVE BOOKING PROCESS INCREASES TRUST."

56%

AGREED THEY "WOULD BE MORE LIKELY TO TEST DRIVE IF IT WAS EASIER TO BOOK."

Your booking flow isn't just a utility. It's a trust builder, or a trust destroyer.

CAR BUYER AGREEMENT WITH TEST-DRIVE STATEMENTS



IMPROVING THE ONLINE JOURNEY

When asked what would make the online buying journey better, **the human element delivered digitally**, emerged as the priority:

21%

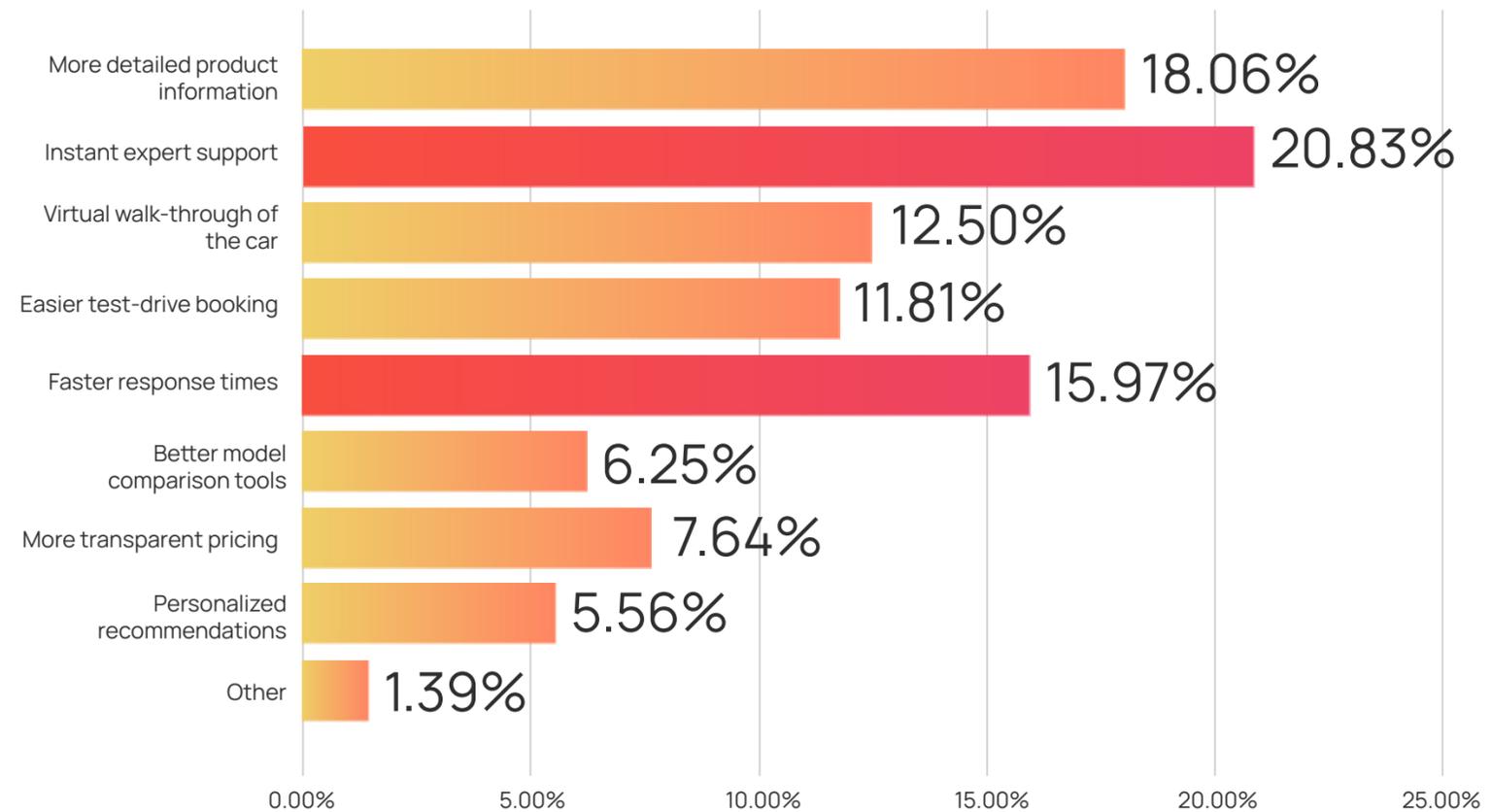
WANT INSTANT
EXPERT
SUPPORT

16%

WANT FASTER
RESPONSE
TIMES

Combined, **nearly 37%** of respondents indicated that responsive, expert support is the primary driver for a better experience. This challenges the assumption that online buying should be entirely automated. The reality: it should be supported by instant access to expertise.

WHAT WOULD MAKE THE ONLINE BUYING JOURNEY BETTER?



SECTION 4

THE DECISION MOMENT



Hi Steven, Thanks fro
reaching out! What
can I help you with
today?



WHEN IS THE EXPERT NEEDED?

Timing is everything in sales. We asked buyers when they feel ready to speak to an expert:

25.7%

SAID "AFTER
COMPARING
MODELS"

19.4%

SAID "WHEN I
START
RESEARCHING"

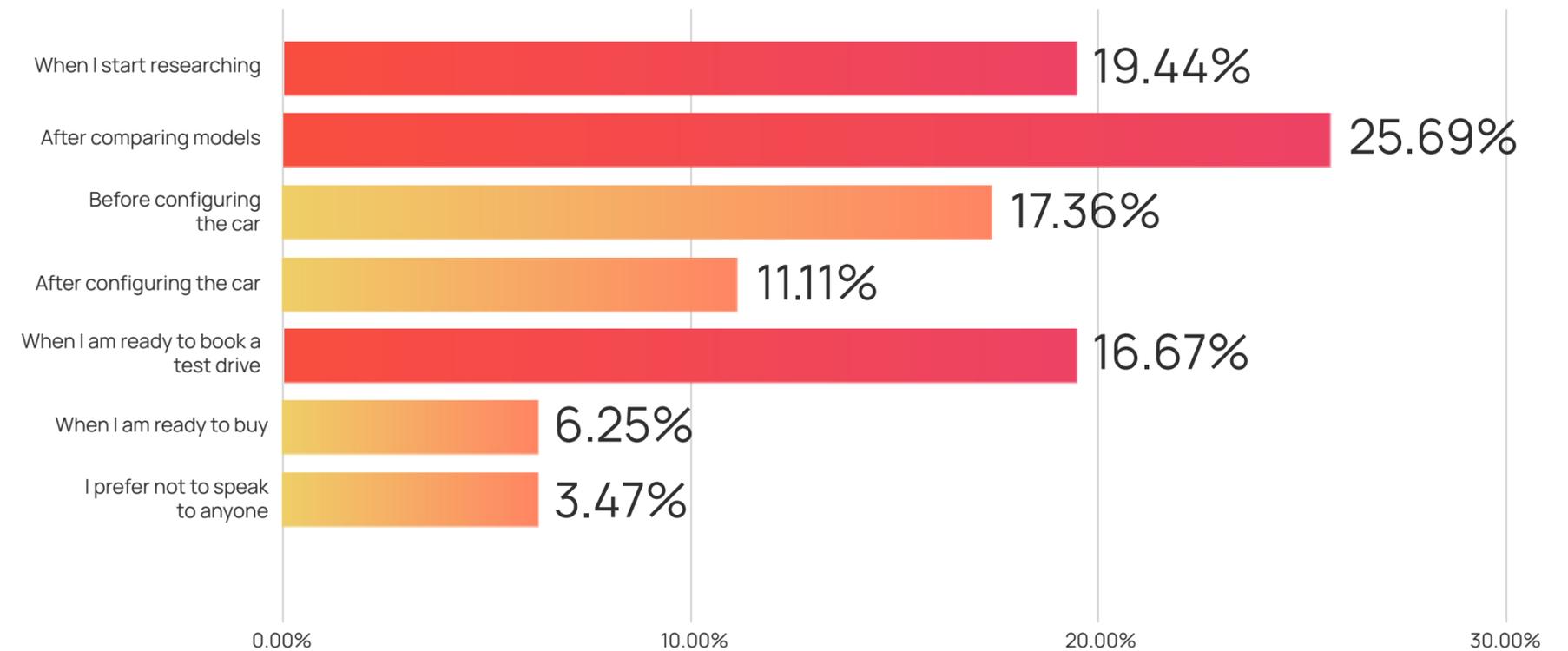
16.7%

SAID "WHEN I AM
READY TO BOOK
A TEST DRIVE"



This distribution demolishes the old "wait for them to be ready to buy" approach. **Only 6% want to speak to an expert when they're ready to purchase.** By then, they've already decided. Support must be available during comparison and research phases to guide the decision, not just close it.

AT WHICH MOMENT DO YOU FEEL READY TO SPEAK TO AN EXPERT?



TOP INFLUENCING FACTORS

When making the final decision, buyers rank their influences clearly:

#1

PRICE
(SCORE: 4.97)

#2

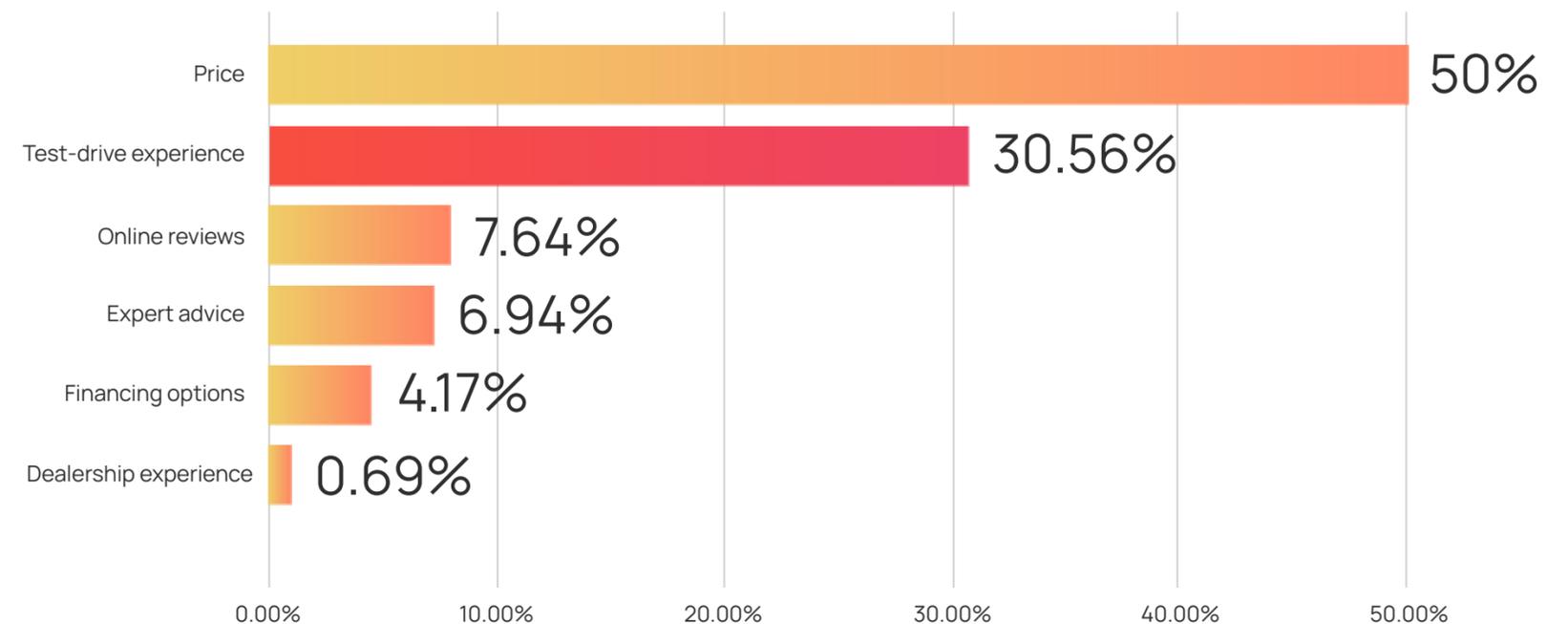
TEST-DRIVE
EXPERIENCE
(SCORE: 4.55)

#3

ONLINE REVIEWS
(SCORE: 3.72)

The test drive is the **#2 most influential factor**—ranking higher than expert advice, financing options, or dealership experience. This has profound implications: securing the test drive is effectively securing the sale.

WHAT ARE THE TOP 3 FACTORS INFLUENCING YOUR FINAL DECISION?



This research set out to examine three critical dimensions of the modern car-buying journey: Awareness, Friction, and Intent. What we found confirms a fundamental disconnect in the automotive industry, one that represents both a challenge and an opportunity.

AWARENESS IS NOT THE PROBLEM.

With 95% of buyers knowing they can test drive and 89% researching online before purchase, today's consumers are informed and engaged. The infrastructure of awareness is working.

FRICION IS THE PROBLEM.

The journey breaks down at the precise moment a digitally-informed buyer tries to take the next physical step. While 69% research on mobile devices, 59% are still forced to book test drives through walk-ins or phone calls. This channel mismatch creates friction when intent is at its peak and with 45% of buyers taking only one test drive, that friction translates directly to lost sales.

INTENT IS BEING WASTED.

The data reveals that buyers arrive with clear, actionable intent: 40% prioritize real-time availability and instant confirmation above all else. They want to know now if they can drive then. Yet "no clear availability" ranks as the #1 barrier to booking. High-intent prospects are being lost not to competitors' better products, but to competitors' better processes.

CONCLUSION: BRIDGING THE DIGITAL- PHYSICAL GAP

KEY TAKEAWAY 1: THE TEST DRIVE IS THE CRITICAL SALES GATE

The test-drive experience is the second most influential factor in a car purchase (Score: 4.55), surpassed only by price (Score: 4.97). It outranks expert advice, financing options, and notably, the dealership experience itself (Score: 2.06). This hierarchy is telling: process matters more than place. Securing the test drive is effectively securing the sale.

KEY TAKEAWAY 2: DIGITAL MODERNIZATION IS NON-NEGOTIABLE

Customer expectations, shaped by seamless e-commerce experiences elsewhere, are colliding with the automotive industry's legacy processes. 30% of buyers want to book via WhatsApp or AI chat tools, yet virtually none currently can. 58% say a smooth booking process increases brand trust. The solution lies in real-time, digital convenience—not as a nice-to-have, but as a competitive requirement.

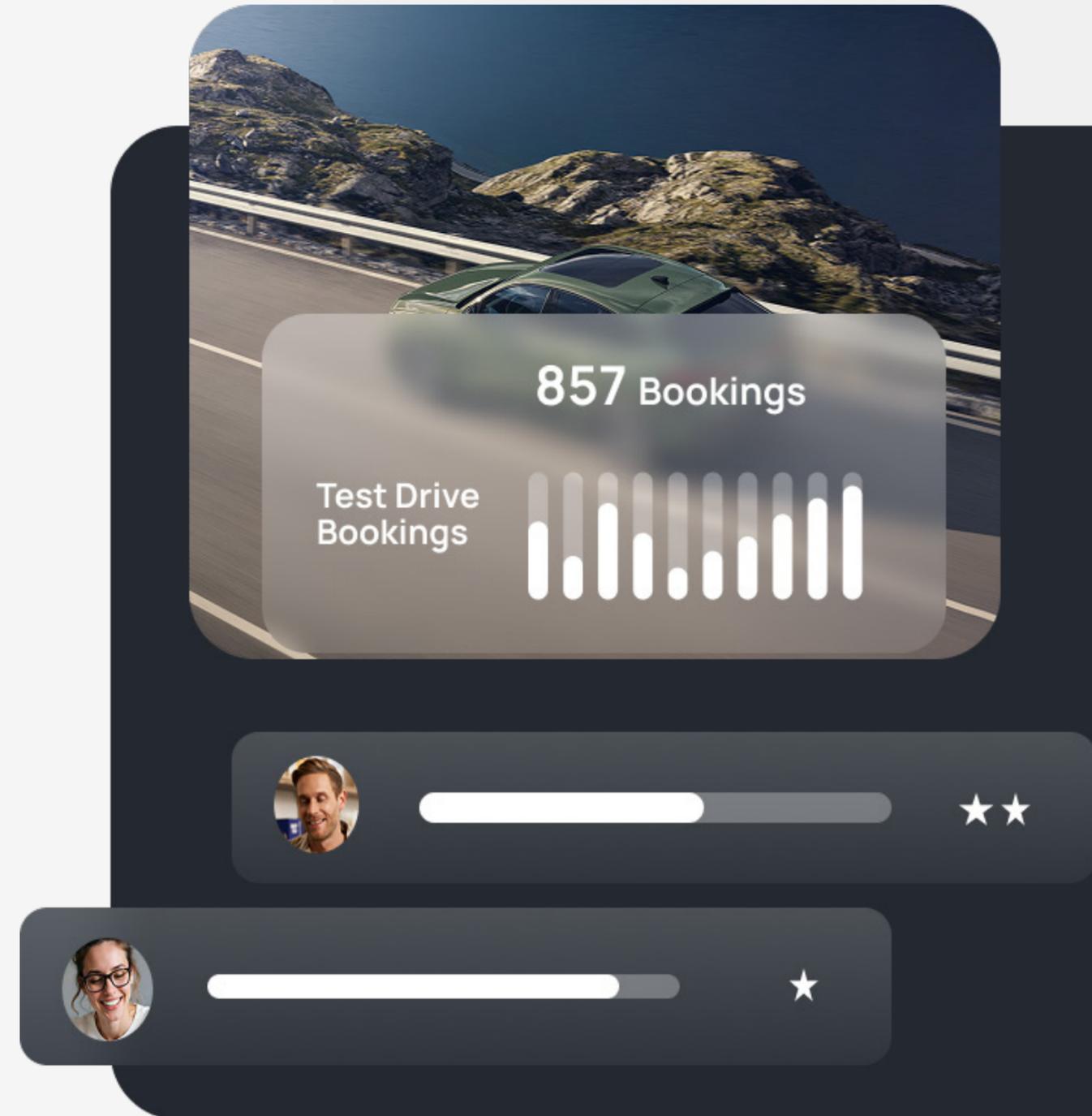
KEY TAKEAWAY 3: FIX THE PROCESS, NOT THE SHOWROOM

The analysis of purchase influence factors delivers a clear strategic directive: factors related to the transactional process (price, test-drive experience, online reviews, expert advice) are the top four purchase influencers. The general dealership experience ranks last. Brands must first bridge the gap between digital research and physical test drive before investing in showroom improvements.

THE PATH FORWARD

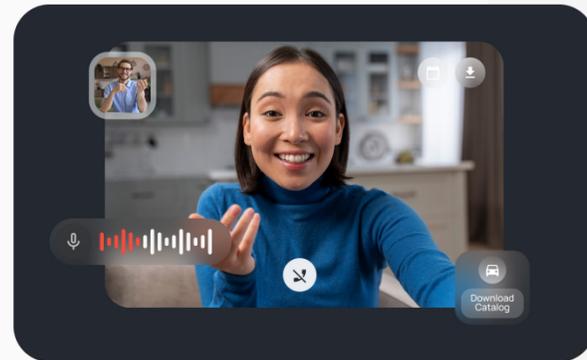
The 2026 car buyer is experienced, mobile-first, and friction-fatigued. They don't need more awareness, they need activation. The brands that deliver real-time availability, modern channel support, and instant expert access will capture the intent that others lose to frustration.

Every booking enabled is a sale nearly won. Every friction point is a customer lost to a competitor whose website worked.



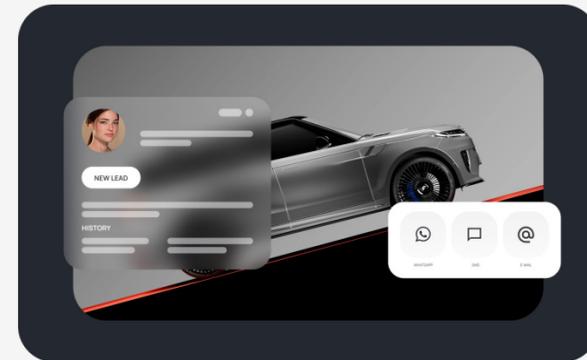
HOW ONLIVE.AI ADDRESSES THESE CHALLENGES

Onlive.ai's platform is designed to solve the exact friction points this research reveals: **connecting automotive brands and dealerships with high-intent buyers at the moment they need help most.**



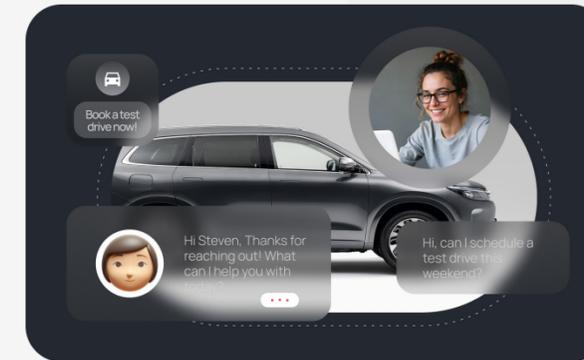
REAL-TIME EXPERT ACCESS:

With 32% of buyers feeling isolated during research and 37% citing instant expert support as their top improvement request, Onlive.ai delivers live video and chat connections to product specialists—on demand, in the customer's preferred channel.



MODERN CHANNEL SUPPORT:

Our platform enables engagement across WhatsApp, web chat, and AI-assisted tools, meeting the 30% who prefer conversational booking exactly where they already communicate.



SEAMLESS TEST-DRIVE CONVERSION:

By providing real-time availability visibility and instant confirmation, Onlive.ai eliminates the top barriers to booking that cause lead leakage and missed opportunities.



TRUST THROUGH EXPERIENCE:

Every Onlive.ai interaction is an opportunity to demonstrate brand quality before the customer ever sets foot in a showroom, building the trust that 58% say comes from a smooth process.

The automotive purchase journey has fundamentally changed. Customer expectations have evolved faster than most brands' capabilities. Onlive.ai exists to close that gap, transforming digital research into physical test drives, and test drives into sales.

Learn more at onlive.ai