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Master's Thesis

Marketing Techniques for Electric Car

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Economics Policy and Administration
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Thesis title

Marketing Techniques for Electric Car

Objectives of thesis

The main objective is to analyze the overall trend of marketing techniques of the electric car and compare the marketing promotions of the electric car in the Chinese market, in order to find out more effective marketing techniques.

Methodology

"Literature Review" part will be elaborated based on theoretical knowledge and basic definitions regarding the electric car, marketing technique and promotion are explained and analyzed.

"Case study and Analysis" part will result from relevant secondary data and marketing promotion research.

Recommended structure:

1. Introduction
2. Objectives of thesis and Methodology
3. Literature Overview
4. Case study and Analysis
5. Results and Recommendations
6. Conclusions
7. References
8. Appendices

The proposed extent of the thesis

60-80 pages

Keywords

Electric car, marketing techniques, marketing communication, marketing mix, promotion, advertising, social media, omnichannel

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Recommended information sources

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Declaration

I declare that I have worked on my master's thesis titled "Marketing Techniques for Electric Car" by myself and I have used only the sources mentioned at the end of the thesis. As the author of the master's thesis, I declare that the thesis does not break any copyrights.

In Prague on 30.11.2021 ______________________________

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Marketing Techniques for Electric Car

Abstract

As a potential market at the forefront of the world, China advocates the development of new energy vehicles (NEVs) to cope with climate change, but consumers still lack enthusiasm for NEVs. With the progress and development of society, peoples' consumption concepts and consumption patterns are changing. The traditional marketing model can no longer meet the needs of contemporary people, and new marketing models will inevitably emerge. The author believes that whether it is a traditional Original Equipment Manufacturer (OEMs)or an emerging NEV automaker, their marketing techniques such as mobile marketing, social marketing, and digital marketing should gradually become trends closer to consumers' lives. The author aims at Chinese consumers as the target of analysis and proposes to conduct business and communication strategic cooperation with mobile platforms (such as Weibo, WeChat, and live streaming APP) to achieve more accurate real-time interaction and communication between the brand and the target audience. Furthermore, the author hopes to provide suggestions and enlightenment for transforming the traditional OEMs NEV brand marketing strategy and putting forward the marketing techniques reference for the future marketing promotion of the NEV brands.

Keywords: New Energy Vehicle, Electric car, marketing techniques, marketing mix, marketing communication, omnichannel, social media marketing, digital marketing, mobile marketing

Marketingové techniky pro elektromobily

Abstrakt

Čína, jako potenciální trh v popředí světa prosazuje vývoj nových energetických vozidel, která by se vyrovnala se změnou klimatu, ale spotřebitelům stále chybí nadšení pro NEV. S pokrokem a rozvojem společnosti, mění se koncepce a vzor spotřeby lidí. Tradiční marketingový model již nedokáže uspokojit potřeby nynějších lidí, tím pádem objevení těchto nových modelů je pro společnost nevyhnutelné. Autor se domnívá, ať už jde o tradiční OEM nebo nastupující automobilku NEV, jejich marketingové techniky jako mobilní marketing, sociální marketing a digitální marketing by se měli stát v budoucnu životním trendem spotřebitelů. Autor se zaměřuje na čínské spotřebitele jako cíl analýzy a navrhuje vést obchodně-komunikační strategickou spolupráci s mobilními platformami, jako jsou Weibo, WeChat a live streaming APP, aby bylo dosaženo více přesných kolaborací v reálném čase a komunikace mezi značkou a cílovou veřejnosti. Autor věří, že poskytne návrhy a poučení pro transformaci tradiční marketingové strategie značky NEV OEM a předloží referenční marketingové techniky pro budoucí marketingovou propagaci NEV.

Klíčová slova: Nové energetické vozidlo, elektromobil, marketingové techniky, marketingový mix, marketingová komunikace, omnichannel, marketing na sociálních sítích, digitální marketing, mobilní marketing

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List of abbreviations

APP	Application
BEV	Battery Electric Vehicle
EV	Electric Vehicle
FCEV	Fuel Cell Electric Vehicle
HFCEV	Hydrogen Fuel Cell Electric Vehicle
ICEV	Internal Combustion Engine Vehicle
NEV	New Energy Vehicles
OEM	Original Equipment Manufacturer[1]
PHEV	Plug-in Hybrid Electric Vehicle
WOM	Word of Mouth

[1] OEM is an abbreviation for original equipment manufacturer. In the automotive industry, this term generally refers to automotive manufacturers.

1 Introduction

With the increasing demand for energy conservation, emission reduction and renewable energy development around the world, governments are actively encouraging the development of the new energy vehicle industry. The announcement and regulation of a ban on the sale of Internal Combustion Engine Vehicles (ICEVs), both in ideologically innovative Europe and in the fast-growing Asia-pacific region, have been issued in stages, and most of these stages point to 2025. The international background is such that the development of new energy vehicles in China is in a leading position. In China, the government states that Electric Vehicle (EV) are known as "new energy vehicles" (NEV), which broadly refers to battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), and fuel cell electric vehicles (FCEVs). (MIIT, 2017) This thesis concentrates on the Chines passenger EVs market of these three types electric vehicles: mainly in BEVs and PHEVs, as well as HFCEVs will be included in the statistical scope in a small number of reported statistics. China, one of the world's most promising markets, has advocated the development of electric vehicles to address rising challenges such as climate change, urban air pollution, and energy security, but consumer enthusiasm for electric cars remains low. At present, China's electric vehicle marketing not only focus on the policy-driven market, should gradually turn to consumer demand.

Traditional OEMs have already begun to layout offline channels. They take retail stores, various experience stores, auto trade shows and even pop-up events as the scene, introduce VR, virtual cockpit and other equipment, to actively interact with prospective customers. Emerging NEVs automakers, such as new energy vehicle enterprises, have made some achievements in the online platform construction. With the progress and development of society, people's consumption concepts and consumption patterns have also changed. The traditional marketing model of the automobile industry has been unable to meet the needs of the current generation, and the new marketing model is bound to appear to meet the needs of consumers for personalized consumption. At the same time, it also improves car sales performance.

This thesis focus on three parts. First, the development background of the NEV industry was introduced from both the world and China perspectives. These include the macro-environment under global agreements and policies, such as the issuance of the Paris Agreement and the plan for phase-out the ICEVs, as well as China's domestic policies and the driving role of market demand. In the electric car market, consumer demand is also gradually becoming diversified, not only limited to the product itself but also their consumption psychology will affect their purchase behaviour.

The evolution of the marketing concept will be outlined in the next section. In recent years, with the development of the Internet, people's marketing touchpoints is developing from tradition to innovation. Traditional marketing is still very effective in building brand awareness and interest, but once customers continue to build closer relationships with brands, digital marketing is playing a more prominent role. Marketing 4.0, which emphasizes connection and technology. The sellers create a community that including existing customers, potential customers, and sellers themselves, rather than directly promote their product to the specific individual customers. It is not only a combination of the physical and virtual market but also is a combination of online and offline marketing methods, to develop customer engagement and advocacy. (Kotler, Kartajaya, Setiawan, 2017, p. 53) To adapt to the omnichannel concept, electric vehicle enterprise and marketers need to understand customer behaviour and the customer's decision-making path. Specifically, the factors that may prompt the customer to make a purchase decision, which is related to their lifestyle, shopping experience and distance to the retail store. With the omnichannel marketing approach, retailers and marketers can provide targeted incentives through traditional and digital promotions. (Gotwald-Feja, 2016)

Finally, concerning the analysis results and recommendations based on the research and analysis of secondary data, professional research reports, and case studies. The author analyses consumer needs based on the results of the questionnaire survey, constructs a portrait of the electric vehicle consumer, finds out the potential buyers' perception of the new energy vehicle, and proposes marketing techniques based on the survey results. The electric car enterprises and marketers need to gradually develop an appropriate marketing strategy to improve sales, which must find the right market positioning through consumer insight and choose more appropriate and effective marketing techniques.

2 Objectives and Methodology

2.1 Objectives

Firstly, it describes the insights and outlook of electric vehicles (EVs) in the Chinese market and defines the types of EVs mainly carried in this thesis. The author intends to outline the concept of marketing strategy and marketing mix, combines previous literature research and practical analysis, and tries to explain the change of marketing strategy in the digital era. The purpose of the theoretical part is to identify the changes in the current automotive marketing environment and to propose the changes of electric vehicle marketing strategies in the Chinese market.

Secondly, by analyzing the current consumer behavior and decision-making path, the author tries to find out: the motivation of people to buy electric cars; how to strengthen these driving factors in the marketing promotion, which marketing touch points influence consumers' experience in the omnichannel; and what kind of marketing strategy is more effective in the current environment.

At last, the most important goal of this paper is to find out what marketing techniques can make electric vehicles more attractive to consumers in the Chinese market.

2.2 Methodology

This diploma thesis consists two main parts: "literature review" and "practical part".

The first part is represented by ***literature review*** which is the theoretical part of the thesis. The theoretical part of the thesis will be the study of literature, studies and other information related to the selected topic. These external secondary data were obtained from the study and analysis of the professional literature, related research report and internet sources which are listed at the end of the work (Chapter 7 Bibliography).

The second part is represented by ***practical part*** which is mainly discussed the research and analysis. The beginning of the practical part is approached to the analysis of the cases which mainly from the secondary data, and then propose the hypothetical suggestion. The rest of the practical part will be focused on marketing research. After the analysis and elaboration of the results, optimized suggestions will be discussed and put forward in Chapter 5 (Result and Discussion).

The author analyzes the marketing strategies of automobile enterprises in the selected typical cases and puts forward the validity hypothesis of the marketing techniques implemented in the cases. The authors conducted qualitative research, including online qualitative questionnaires and brief interviews. The questionnaire survey mainly investigated consumers' preference for electric vehicle demand and their preference for marketing communication experience, to find out whether the marketing techniques proposed in the case studies, which can effectively be applied to the electric car marketing strategies.

The questionnaires consisted of 30 questions. Besides identification questions related to gender, age, income and occupation. The questions related to two parts: 1, the consumers' demand for the electric car; 2, the consumers' attitude of marketing communication channels. This questionnaire was done in the Chinese language because of the thesis is targeted the Chinese market. This has been performed in Guangzhou, China, via social media WeChat, in-person interview. It has been estimated to send this questionnaire to only 200 persons to collect quality data by the end of year 2019. The questionnaire was intended by 101 males and 77 females, which from the age of 18 to 60. The content of the questionnaire can be found at the end of the thesis in Chapter 8 (Appendix).

3 Literature Review

This chapter defines the main electric vehicles studied in this thesis and describes the insights and the outlook of electric vehicles in the Chinese market. Trends of China's EVs market will be presented which is the background for the developing marketing in China's EVs market.

This chapter also carries on the basic concept definition of Marketing and introduced the evolution of marketing theories approach to the new marketing: Marketing 4.0. In this chapter, the various Marketing strategies necessary to select the target market are described, which show the general process of achieving the desired goal and setting the marketing mix.

3.1 Types of electric car (EVs)

In China, according to the published policies (MIIT, 2017), the government states that Electric Vehicles (EVs) are known as "new energy vehicles" (NEVs), which refer to those vehicles with new-type power systems, completely or mainly driven by new energy sources. The scope of NEVs in this thesis is including battery electric vehicles (BEVs), plug-in hybrid electric vehicles (PHEVs), and fuel cell electric vehicles (FCEVs).

3.1.1 Battery electric vehicles (BEVs)

Pure battery electric vehicles (BEVs) are also referred to as battery-only electric vehicles. BEVs have no engine and are powered by one or several on-board high-energy batteries. Modern models use a regenerative braking system to save energy. (Wolfram and Lutsey, 2016, p. 3) BEVs rely entirely on external charging to provide power and can achieve zero exhaust emissions after use. However, due to the current imperfect development of battery technology, products and infrastructure, market competitiveness is relatively weak. Currently, this is mainly policy-driven market. BEV is currently the main strategic direction for the development and marketing of new energy vehicles in China. (An, et al., 2019, p. 39)

3.1.2 Plug-in hybrid electric vehicles (PHEVs)

The Plug-in hybrid electric vehicle (PHEV) has two drive systems that can be charged externally, both purely electric and fuel-driven. PHEVs is equipped with electric motors and high-energy batteries that can be charged from the power grid. Before an internal combustion engine was required, modern PHEVs could travel different distances in electric mode. In the electric driving mode, the energy efficiency of the propulsion system is almost as powerful as BEV. (Wolfram and Lutsey, 2016, p. 3)

Fuel-driven solves consumer mileage anxiety. The pure electric mode can reduce fuel consumption and emissions. Shanghai offers the same preferential policies for PHEVs and BEVs. According to market feedback, 2/3 of consumers choose PHEV and another 1/3 of consumers choose BEV. PHEV is considered as a transition choice from a traditional fuel car to a pure electric vehicle. (An, et al., 2019, p. 39)

3.1.3 Fuel cell electric vehicles (FCEVs)

Technically, FECV mainly refer to hydrogen fuel cell electric vehicles (HFCEV), powered by a fuel cell, which generates electricity from hydrogen and air. Electricity from the fuel cell directly powers the electric motors that drive the wheels and can also be used to charge the battery pack if necessary. (Wolfram and Lutsey, 2016, p. 3)

FCEVs have the characteristics of high energy density, no pollution, and high efficiency. However, there are some problems such as high battery costs and weak infrastructure. It is still in the demonstration stage and has not yet entered the Chinese consumer market. Nevertheless, the technology has huge potential in the future, expected to be widely used in the field of commercial vehicles. (An, et al., 2019, p. 39)

3.2 Insights of electric car market

3.2.1 Background of electric vehicle development

Problems such as global warming and greenhouse gas emissions are becoming more and more serious, and it is equally urgent to find new alternative energy sources. Governments in dealing with environmental protection and energy savings of the same attitude led to the world's automotive industries transit to new energy sources. As the country with the largest number of cars producing, selling and consuming in the world, China's influence on global automobile development and trends is self-evident.

Global agreements to protect the environment, such as the Paris Agreement, and the introduction of government policies, such as the ban on internal combustion engine vehicles (ICEVs), have pushed Traditional OEMs to switch to electric vehicles and shift the focus of research and development, production, supply chain and sales from ICEVs to NEVs at the global level. As a potential emerging market, numerous new car manufacture forces have been emerging in recent years, hoping to rely on policy and capital dividends in the market to get a decisive opportunity.

Paris Agreement

With the increasing level of industrialization in the world, problems such as greenhouse gas emissions and over-exploitation of primary energy are increasingly prominent. At the Paris Climate Conference (COP21) in December 2015, 195 countries adopted the first-ever legally binding global climate change agreement. The Paris Agreement sets out a global action plan that aims to set out a global framework by limiting global warming, investing in renewable energy and developing energy-saving and emission-reduction technologies. The Paris Agreement bridges the gap between today's policies and the goal of climate neutrality by the end of the century. (EU, 2015)

The Paris Agreement sets out for the first time a hard target for controlling temperature changes. "Get the dangerous climate change by limiting global warming to well below 2 ° C above the pre-industrial levels and pursuing efforts to limit it to 1.5 ° C." The relevant agreements are as follows:

Paris Agreement, Article 2

1. This Agreement, in enhancing the implementation of the Convention, including its objective, aims to strengthen the global response to the threat of climate change, in the context of sustainable development and efforts to eradicate poverty, including by:

(a) Holding the increase in the global average temperature to well below 2 °C above pre-industrial levels and pursuing efforts to limit the temperature increase to 1.5 °C above pre-industrial levels, recognizing that this would significantly reduce the risks and impacts of climate change;

> *(b) Increasing the ability to adapt to the adverse impacts of climate change and foster climate resilience and low greenhouse gas emissions development, in a manner that does not threaten food production; and*
> *(c) Making finance flows consistent with a pathway towards low greenhouse gas emissions and climate-resilient development.*
> *2. This Agreement will be implemented to reflect equity and the principle of common but differentiated responsibilities and respective capabilities, in the light of different national circumstances.* (*UN, 2015, p. 3, Paris Agreement, Article 2, FCCC/CP/2015/10/Add.1)*

In the context of the Paris agreement and the previous UNFCCC (United Nations Framework Convention on Climate Change) and other agreements, the corresponding policies, funds, technologies, and industrial supporting facilities began to emerge. New energy vehicles, environmental protection, and other emerging industries have also received attention and development. (EU, 2015)

Policies: Phase-out of ICE vehicle

Since 2005, some of the world countries and cities have issued policies and timetables to phase out ICE vehicle s over the next few decades, reducing emissions of polluting gases and curbing the over-exploitation of fossil fuels. (Zhang, Li, You, 2019, p. 6)

As can be seen from the table1 (Table 1), European countries and cities account for the majority of the regions where fuel vehicles are banned. Europe, especially the Nordic countries, has always been ahead of other regions in implementing new energy policies and industries. Meijer, Kerry (2019) reported that, the Dutch government has even proposed a national plan to achieve zero emissions by 2030. In order to clean up Amsterdam's air, the city will ban the use of ICE cars and motorcycles from 2030.

Table 1: Jurisdictions with ICE vehicle bans

Country	Ban announced	Status and proposed commencement	Scope	Selectivity
China	2017	"Researching a timetable"	Gasoline or diesel	New car sales
	2018	2030 – Hainan	Gasoline or Diesel	All vehicles
Costa Rica	2019	2050	Gasoline or diesel	New car sales
Denmark	2019	2030	Gasoline or diesel	New car sales
France	2017	2040	Gasoline or diesel	New car sales
Germany	2017	2030 – Heidelberg	Gasoline or diesel	All vehicles, electric buses by 2025
Iceland	2018	2030 (climate plan)	Gasoline or diesel	New car sales
Ireland	2018	2030 (private members bill, not yet passed)	Gasoline or diesel	New car sales
Israel	2018	2030 "natural gas or electricity"	Gasoline or diesel (natural gas exempt)	New imported vehicles
Italy	2017	2030 – Milan	Diesel	All vehicles, electric buses by 2025
	2018	2024 – Rome	Diesel	All vehicles
Netherlands	2017	2030 (coalition "plan")	Gasoline or diesel	All cars
Norway	2017	2025 (tax and usage incentives)	Gasoline or diesel	Cars
Singapore	2020	2040 (incentives on electric vehicles)	Gasoline or diesel	All vehicles
Slovenia	2017	2030 (emission limit of 50 g/km)	Gasoline or diesel	New car sales
Sri Lanka	2017	2040	Gasoline or diesel	All vehicles
Sweden	2018	2030 (coalition agreement to ban new sales)	Gasoline or diesel	New car sales
United Kingdom	2017	2040 – England, Wales, Northern Ireland 2032 – Scotland	Gasoline or diesel	New car sales
	2020	2035 or 2032 (proposed new dates)	Non-electric	New car sales

Sources: assembled by own, Wikipedia, 2020 & iCET, 2019

These countries and regions, which have proposed the bans of ICE vehicles, already accounts for the vast majority of global automobile sales. This has pushed Traditional OEMs to implement electrification, to develop new energy vehicles and the strategies in response to fuel bans.

The Innovation Center for Energy and Transportation (iCET) released a report in May 2019 detailed the structure and feasibility of China's ambitious goal of phasing out internal-combustion engine vehicles (ICEVs) and switching to new energy vehicles (NEVs) by 2050. According to a development plan issued by the provincial government, China's southernmost island province of Hainan will ban the sale of ICEVs throughout the province by 2030, which will be the first Functional Pilot Regions of China. (An, et al., 2019)

The impetuses for Chinese NEVs development

Since 2001, the Chinese government has been continuously promoting the development of the NEV industry with policies and incentive programs, which has greatly pushed the development of the domestic NEV industry. Reasons for China's EV push:

- Clean air in cities;
- Reduced oil import;
- Reduced CO_2 emissions;
- Industrial policy: main layers of aggressive EVs policy support in China -- national policies, regional policies, city regulations. (McKerracher, 2019)

  For instance, the main effective policies will be listed as followed:

  - **City restrictions on ICEVs**

  Eight cities have restricted to issue ICEVs license plates via bidding or lottery, which include six cities (Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou, Tianjin) with major ICEV purchase restrictions and two cities (Guiyang, Shijiazhuang) with minor ICEV purchase restrictions. Most of these cities have implemented the traffic restriction scheme. (Colin McKerracher, 2019) In the future, the number of cities will continue to increase. The license restriction policies have greatly increased the cost of getting a traditional ICEV license plates, thereby, directing demand towards NEVs that are more easily licensed. Meanwhile, government subsidies, tax relief, and other incentive policies have stimulated consumer demand for NEVs, creating an incremental market. (HDMR, 2019, p. 92)

  - **NEV mandate policy (CAFC & NEV Credit Regulation)[2]**

  China is working on changing the new energy vehicle (NEV) mandate policy, also refer to CAFC and NEV Credit Regulation, which aims at driving the upgrade of fuel-efficient technologies and the development of NEV. China's Ministry of Industry and Information Technology (MIIT) finalized the New Energy Vehicle (NEV) mandate policy in September 2017, which specifies NEV credit targets for two years: 10% of the conventional passenger vehicle market in 2019 and 12% in 2020. (ICCT, 2018) After a couple of years, MIIT released a modified version of its NEV policy in June 2019, which stipulates that fuel-efficient vehicles could offset 20% of the credits set for corresponding electric car. (Shen, 2019)

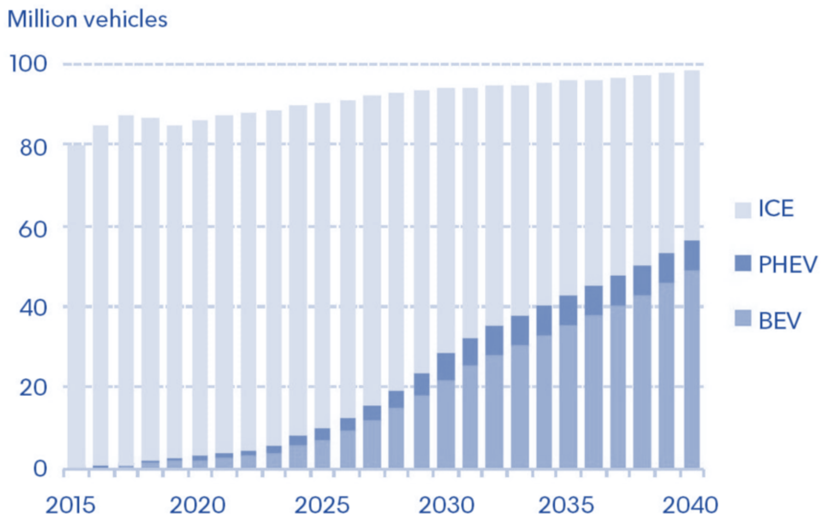
[2] Note: About two-thirds of China's NEV sales are passenger cars and one third are commercial vehicles. This policy applies only to passenger vehicles. MIIT, 2018

The Chinese government had previously set a goal that all-electric vehicles should account for about 20% of total car sales by 2025. (Shen, 2019) The automobile enterprises are supported by national policies in R&D and production, assist the country to achieve strategic goals and satisfy consumer demand. Chinese automobile manufacturers have flooded into the NEV market in response to local government incentives. By producing electric vehicles instead of developing traditional cars and energy-saving technologies, automakers can more easily achieve emission targets.

3.2.2 Global EVs market

As can be seen in the figure (Figure 1), over 2 million electric vehicles were sold in 2018, up from just a few thousand in 2010, and there is no sign of slowing down. BloombergNEF predict that the annual sales of passenger electric vehicles will increase to 10 million by 2025, 28 million by 2030, and 56 million by 2040. BloombergNEF also expect that, by 2040, electric vehicle sales will account for 57% of global total sales, and the number of electric vehicles will increase to 30% of the global total vehicle. (McKerracher, 2019)

Figure 1: Global long-term passenger vehicle sales by drivetrain

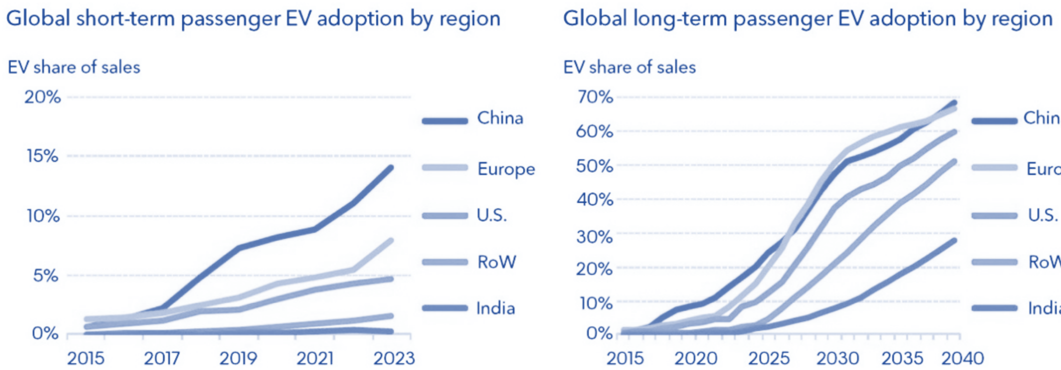


Sources: BloombergNEF, 2019

As the US and European governments improve the development of NEVs, China will become the main battlefield for EVs manufacturers in the next two decades. From 2015, China overtook the United States and European countries and became the world's largest EVs market with the help of government subsidy purchases and encouragement of corporate research and development.

To understand where the global EVs market is going, it is needed to understand where China is going. Thanks to the aggressive policy support at both the national and regional levels, China continues to lead in EVs forecasts, which can be seen in the Figure (Figure 2). China accounts for 48% of the global passenger EVs sales market in 2025, 34% in 2030 and 26% in 2040. (McKerracher, 2019) Chinese OEMs now lead the global EVs market in terms of manufacturing capacity.

Figure 2: Global short-term and long-term EV adoption by region

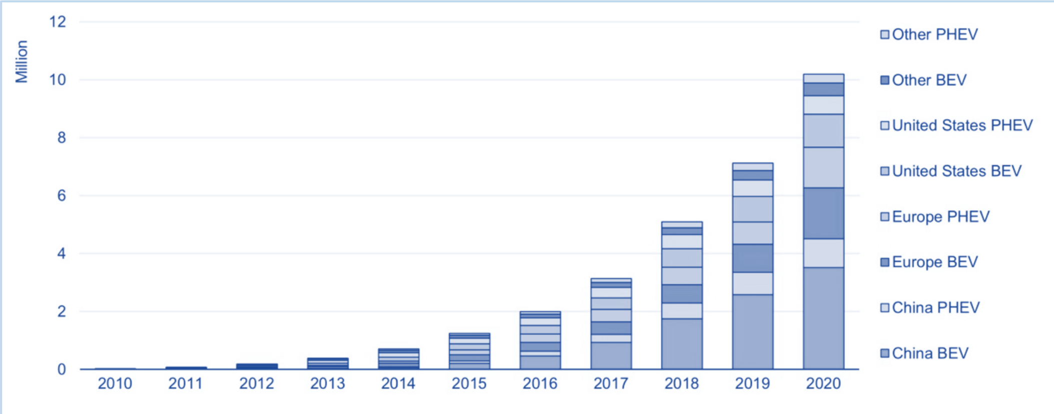


Sources: BloombergNEF, 2019. Note: Europe includes EU + EEA + Switzerland.

After a decade of rapid growth, in 2020 the global electric car stock hit the 10 million mark, a 43% increase over 2019, and representing a 1% stock share. Battery electric vehicles (BEVs) accounted for two- thirds of new electric car registrations and two-thirds of the stock in 2020. China, with 4.5 million electric cars, has the largest fleet, though in 2020 Europe had the largest annual increase to reach 3.2 million.

After a decade of rapid growth, the global EV stock reached 10 million units in 2020, accounting for 43 percent and 1 percent from 2019. As you can see from the figure (Figure 3), BEV accounted for two-thirds of new registrations and two-thirds of total inventory by 2020. With 4.5 million electric vehicles, China has the largest number of electric vehicles in the world, although Europe had the large annual growth rate reaching to 3.2 million by year 2020. (IEA,2021)

Figure 3: Global Electric Car stock, year 2010-2020



Sources: IEA, 2020

Therefore, the Chinese NEVs market has great development potential. There is a huge opportunity not only for the traditional OEMs but also for the Emerging NEV automakers.

TMI (2018, p. 6) remark that, China's new energy passenger cars market will change from policy-driven to market-driven in the future. The main reasons are:

- The decline in policy subsidies.
- Requirements of the CAFC & NEV Credit Regulation.
- Higher product performance requirements from consumers.
- Development of the intelligent connectivity functions and human-oriented design for new energy vehicles.

In 2019, despite policy changes and reduced government subsidies, consumer enthusiasm for electric cars is still rising, and China's new energy vehicle sales have grown significantly. At the same time, the gradual cancellation of subsidies and the expansion of consumer choices are developing market maturity. Consumers are now thinking more seriously about what they want from NEV and which model will satisfy their needs. (Guan, et al., 2019, p. 23)

3.3 Marketing theory and evolution

Kotler, Kartajaya, and Setiawan (2010, p. 30) indicated that, "*New marketing concepts always emerge as a reaction to the changing business environment.*" Meanwhile, enterprises and marketers have started to think about "*How to improve their marketing strategies to adapt the evolution?*" "*How to attract consumers and increase their value with an efficient expense?*" "*What kind of value and experience can create for the user and reach their needs?*".

Figure 4 illuminated the major shift of Marketing Evolution begin from being product-centric (*Marketing 1.0*) to being customer-centric (*Marketing 2.0*); to *Marketing 3.0* a human-centric approach that elevates the concept of marketing to the field of human desire, value and spirit, and supplements emotional marketing with human spirit marketing; and ultimately turns to the digital-centric *Marketing 4.0*, which aims to help marketers identify and prepare for the shifting roles of traditional and digital marketing in building customer engagement and advocacy. (Kotler, Kartajaya, and Setiawan, 2017)

Figure 4: Marketing Evolution

Sources: Marktruelson.com

Kotler, Kartajaya, and Setiawan (2017) further proposed a new marketing concept: *Marketing 4.0*, which describes the deepening and expansion of human-centric marketing, which adapting to changing customer paths in the digital economy. The role of the marketer is to guide the customer through the path from awareness to advocacy. As customers continue to build closer relationships with brands, digital marketing plays a more prominent role. The goal of digital marketing should be to drive action and advocacy. Marketers can increase sales through omnichannel marketing and using content marketing to create customer conversation and engagement. Companies could not merely convey their meaning, value, and contribution to the public. Instead, it must establish an in-depth co-construction community with customers, friends, family, friends/followers from social media, and other types of human being groups. (Krauss, 2017)

3.3.1 **Marketing**

Marketing deals with identifying and meeting human and social needs. One of the shortest definitions of marketing is "meeting needs profitably." According to the standard definition, marketing is a social process by which individuals and groups can freely create, provide, and exchange valuable products and services with others to get what they need and want. (Kotler 2002, p.4) Broadly defined, "*marketing is a social and managerial process through which individuals and groups satisfy their needs and wishes in the process of producing and exchanging products or other value.*" By understanding the new sense of meeting customer needs, desires, or wishes, companies should develop products and services and establish profitable, valuable exchange relationships with customers. Kotler and Armstrong (2008, p.7) further defined, marketing refers to the "*process by which companies create value for customers and build strong customer relationships to capture value from customers in return*."

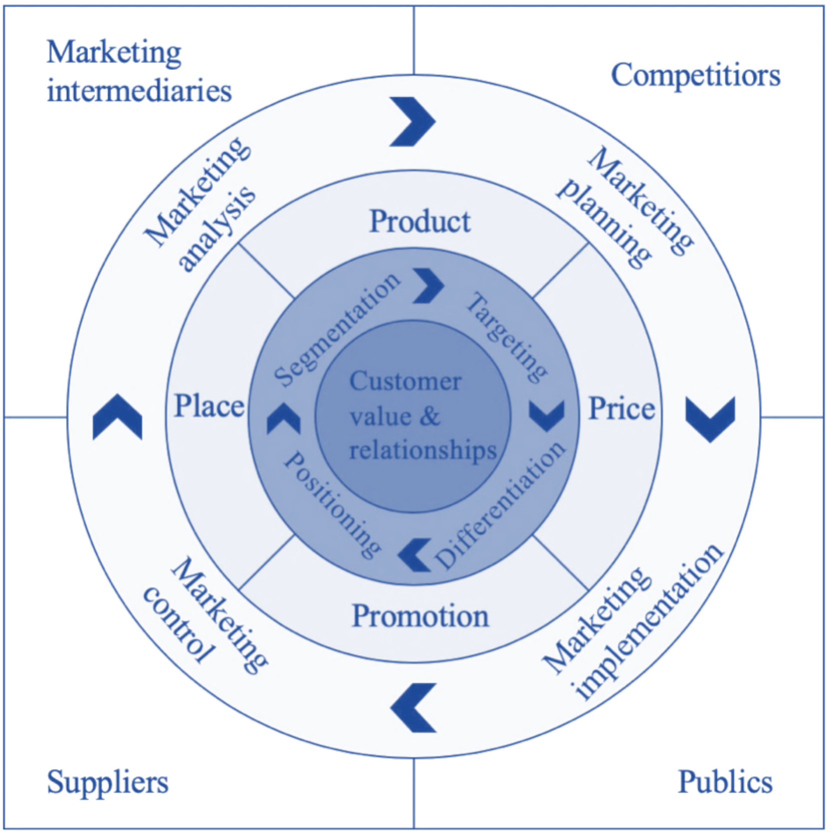
According to the evolution of marketing, some theories and definitions were improved and redefined. In the era of *Marketing 3.0*, Kotler, Kartajaya, and Setiawan (2010, p. 45) argued that marketing is about clearly defining the unique identity and reinforcing it with authentic integrity to build a sharp image. Marketing should not be just as a sales and useful tool to generate demand, but as a significant hope for a company to restore consumer trust.

Marketing 4.0 is a marketing approach in which digital marketing and traditional marketing coexist, which redefined the critical concepts of marketing, helping marketers' transition to the digital economy. Kotler, Kartajaya, Setiawan (2017, p. 53) introduce *Marketing 4.0,* which combines online and offline interactions between companies and customers, integrates style and content into brand building, and ultimately aims to increases customer engagement and gain customer advocacy.

3.3.2 Marketing Strategy and Marketing mix

Kotler and Armstrong (2018, p. 74) defined marketing strategy as *the marketing logic by which company hopes to create customer value and achieve profitable customer relationships*. The core of marketing strategy is all about creating customer value and profitable customer relationships. The marketing strategy involves two key questions: *"Which customers will we serve?" "How do we create value for our customers?"* And then, the company designs a marketing plan (the four Ps) that delivers the intended value to targeted consumers. Figure 5 illustrates the major activities involved in managing a customer-driven marketing strategy and the marketing mix:

Figure 5: Managing marketing strategies and the marketing mix



Sources: Kotler and Armstrong, 2018

Marketing 4Ps is a model that enhances the components of the "marketing mix", a way to bring new products or services to the market. A marketing mix is a set of tactical marketing tools that a company uses in a mixed manner to generate the response it wants in the target market. It can help marketers or companies define marketing options in terms of prices, products, place, promotions, so that products can meet the needs or needs of specific customers. Kotler, Keller (2016, p. 9) stated marketing mix decisions must affect trade channels and final consumers.

The marketing mix constitutes a tactical toolkit for the company to establish a strong positioning in the target market. It believes that the four-P concept adopts the seller's market view, not the buyer's view. From the buyer's point of view, in this era of customer value and relationship, the four Ps may be better described as the four A'. (Table 2) (Kotler, Keller, 2016, p26) Four As is closely related to traditional 4P. Product design affects acceptability, price affects affordability, place affects accessibility, and promotion affects awareness. (Table 2) It is best for marketers to consider 4A first, and then build 4P on the platform.

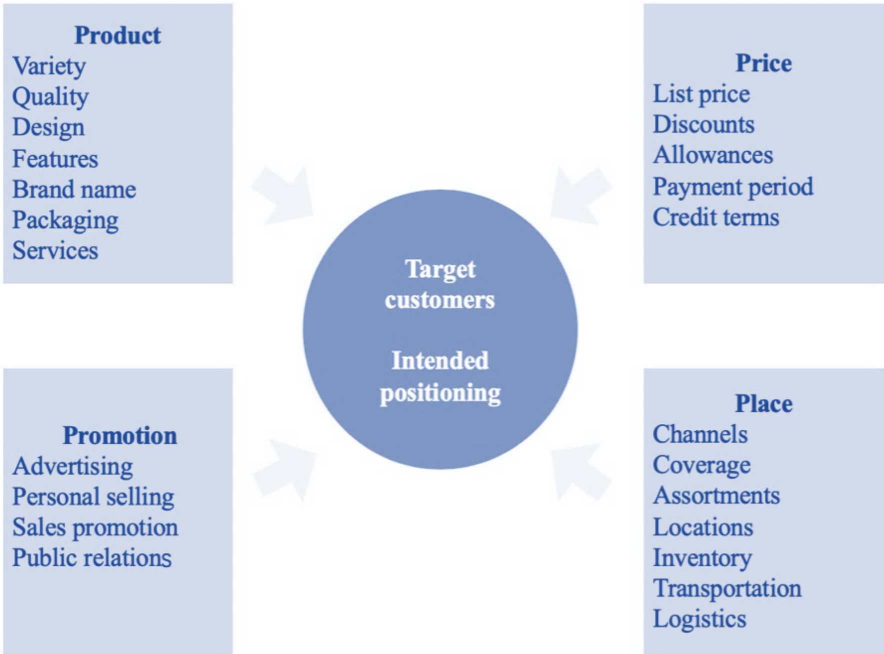
Table 2: Four Ps, Four As, Four Cs

Four Ps	Four As	Four Cs
Product	Acceptability	Co-creation
Price	Affordability	Currency
Place	Accessibility	Communal activation
Promotion	Awareness	conversation

Sources: Kotler & Armstrong, 2018

"Once companies decide what to offer (product and price), they need to decide how to offer it (place and promotion)". Kotler, Kartajaya, and Setiawan (2017, p. 50) emphasize that companies need to determine where products are distributed so that customers can quickly obtain and access the products. Enterprises also need to convey product information to the target audience through advertising, public relations, promotion, etc. (Figure 6)

Figure 6: The Four Ps of marketing mix



Sources: Kotler & Armstrong, 2018

In a connected world, the marketing mix concept has evolved to a high level of customer engagement. Kotler, Kartajaya, and Setiawan (2017, p. 52) further demonstrated that the marketing mix (four Ps) should be redefined as four Cs, refers to: co-creation, currency, communal activation, and conversation). The success rate of new product development can be increased by co-creating and involving customers early in the idea phase in a co-creation way. Co-creation also involves customizing and personalizing products and services to create a superior value proposition for the brand. Successful companies are those that communicate economically, conveniently, and effectively to meet customer needs.

3.3.3 Consumer behavior path

Harris, Kotler, Armstrong, & He (2020, p 159) *described that the buyer decision process consists of five stages:* ***need recognition****,* ***information search****,* ***evaluation of alternatives****,* ***the purchase decision****, and* ***post-purchase behavior****. Clearly, the buying process starts long before the actual purchase and continues long after. Marketers need to focus on the entire buying process rather than on the purchase decision only.*

For marketers, the common consumer behavior path framework in the past is the AIDA framework, which is: A (attention), I (Interest), D (Desire), A (Action). But this framework is very simple and one-dimensional and does not take into account the current interaction between consumers. Kotler and Keller (2016, p131) proposed a new framework, the 5A framework refers to: Awareness, Appeal Ask Act Advocate. (Figure 7)

Figure 7: Five As consumer behavior path framework

Sources: Kotler & Keller, 2016

Customers are becoming more horizontally oriented. They are becoming increasingly wary of marketing communications from brands and are relying instead on the f-factor (friends, families, fans, and followers). Finally, the customer buying process is becoming more social than it has been previously. Customers are paying more attention to their social circle in making decisions. They seek advice and reviews, both online and offline. (Kotler, Kartajaya, and Setiawan, 2017, p12) Marketing is not just something marketers do for consumers. Consumers are marketing to other consumers as well. (Kotler, Kartajaya, and Setiawan, 2010, p32)

3.4 Marketing techniques based on Chinese market

3.4.1 Marketing techniques

Marketing techniques are the things you do to bring in new business or to increase the popularity and reputation of your company. Marketing techniques are, about integrating resource and opportunities, and creating sales opportunities that are targeted at promising markets, from brand building and growth to maturity, to drive faster growth and higher profits.

According to the evolution of marketing environment described above, new and innovative marketing techniques gradually appear, such as social network marketing, viral marketing, WOM- KOL/KOC, mobile marketing (APP), digital marketing.

So effective word-of-mouth marketing programmers usually begin with generating person-to-person brand conversations and integrating both offline and online social influence strategies. The goal is to get customers involved with brands and then help them share their brand passions and experiences with others in both their real and digital worlds.

3.4.2 Scanning the Marketing Environment in Chinese market

China is clearly a digital market -- mobile and social play a key role in advertising success. It's also an environment that prioritizes performance marketing, sales activation, and other forms of short-term action over long-term brand building, ideas, and customer development/engagement. New wave technology facilitates the widespread dissemination of information, ideas, and public opinion that enable consumers to collaborate for value creation. (Kotler, Kartajaya, and Setiawan, 2010, p 22) Moreover, targeting youth is the most exciting thing that marketers do. Marketing to them always involves either cool advertisements, trendy digital content, celebrity endorsements, or innovative brand activations. (Kotler, Kartajaya, and Setiawan, 2017, p 33)

3.4.3 Digital and social marketing

Digital and social media marketing involves the use of digital marketing tools, such as websites, social media, mobile ads and apps, online videos, emails, blogs and other digital platforms, through their computers, smartphones, tablets, and connected digital TVs and other digital equipment. Sincerely, it seems that every company attracts customers through multiple websites, news tweets, viral ads and videos posted on social networking sites, and mobile applications that solve consumer problems and help them shop. In addition to brand websites, most companies also integrate social and mobile media into their marketing mix.

Online social media provides a digital home where people can connect and share important information and moments in life. Therefore, they provide an ideal platform for real-time marketing through which marketers can connect brands with important trending topics, real-world events, careers, personal occasions or other important events in consumers' lives. So as to attract consumers. Marketers can use social media in two ways: they can use existing social media, or they can set up their own. Using existing social media seems to be the easiest. As a result, most brands set up shop on a plethora of social media sites. (Harris, Kotler, Armstrong & He, 2020)

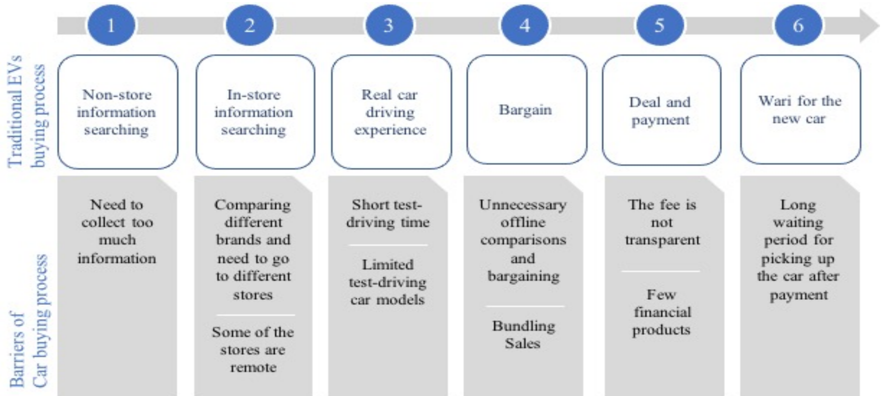
3.5 The barriers of Chinese EVs marketing

3.5.1 Pain points of traditional EVs buying process

According to Roland Berger's survey results, the main pain points for consumers buying electric vehicles are the need to go to various brand stores, not driving deeply, and the time-consuming and laborious negotiation process. The time spent on information collection and price negotiation accounted for 30%, and the overall service experience still needs to be improved. (EV100plus, Roland Berger, 2020)

Consumers need to visit the stores multiple times to compare different brands, mostly in remote areas. Because the test-driving time is too short, the experiential driving is usually not profound, and it takes time to compare and bargain offline, and even bundling sales have become one of the main pain points of consumers.

Figure 8: Pain point of the traditional EVs buying process



Source: EV100plus, Roland Berger, 2020

Omnichannel marketing

Omnichannel is the use of all channels to create a unified experience for clients, which includes traditional and digital channels, point-of-sale, in-store, and online experiences. (Blankenship, 2019) Omni-channel marketing defined as practice of integrating multiple channels to create a seamless and consistent customer experience. It requires organizations to break channel silos and unify their goals and strategies. This will ensure a coordinated effort across multiple online and offline channels to drive customers to make purchase commitments. In order to develop a good omni-channel marketing strategy, marketers need to look at customer paths in a more granular manner. Marketers need to map all possible touch points and channels between the 5 A's. Since there are many possible combinations of touchpoints and channels for the customer experience, marketers need to identify the most popular ones. Omni-channel marketing strategies should focus on integrating the most popular channels. Kotler, Kartajaya, and Setiawan (2017, p145) proposed that omnichannel marketing strategy could be developed by following steps:

Step 1: Map All Possible Touchpoints and Channels across the Customer Path

The first step in developing an omnichannel marketing strategy is to map all possible contact points and channels in the five As. Touchpoints are defined as every direct or indirect customer interaction, online and offline, along the entire customer path associated with the brand. It is often described as the actual actions taken by the customer at each stage of the five As. Marketers need to find the right balance between market coverage and simplicity in planning their omnichannel marketing strategy.

Step 2：Identify the Most Critical Touchpoints and Channels

Any customer may choose to experience a different combination of touchpoints through multiple channel sequences, which is customer path scenarios. If all touch points and channels are used, it may increase the complexity of omnichannel marketing execution, and the focus should be on the most popular touch points and channels for consumers. Hecker, Mou, Maenne (2019, p 13) suggest that whether online or offline, no matter how many forms, in user-centered channel design, all existing channels must cooperate with each other, seamless docking, to provide users with continuous excellent experience.

Step 3: Improve and Integrate the Most Critical Touchpoints and Channels

In order to provide a truly holistic customer experience, companies should also create an organizational structure that can implement this strategy, which is responsible for connecting internal teams across different channels to work together to better achieve a seamless and consistent experience while getting the most sales from omnichannel marketing.

3.5.2 Consumers are still on the sidelines of BEV

For new energy vehicles, economy and driving experience are their natural advantages and become an important selling point of the product; safety is the core demand and pain point of current consumers and shaping users' trust in brand and product safety will help market breakthroughs. At the same time, in terms of branding and marketing, rational and emotional appeals and brand value are the main needs of consumers.

Compared with traditional fuel vehicles, NEVs not only pay more attention to consumer experience in design, but also use new retail models more boldly in marketing models, leading the way. Quickly respond to market changes, open up online and offline channels, optimize consumer shopping experience, and ultimately improve customer satisfaction and brand loyalty. These are the advantages of new energy vehicle manufacturers during the epidemic.

3.5.3 The impact of the COVID-19 pandemic on the NEV market

The most direct impact of the year 2019-2020 COVID-19 pandemic is the drastic reduction in the movement of people and social gathering activities. The government has issued more stringent policies and recommendations in the short term on personnel mobility, production start time, and social activities. During this epidemic, the offline retail industry was most affected. The traditional passenger car market is also highly dependent on offline sales. Offline stores with 4S stores as the main body basically cover the entire purchase process of customer selection, testing, and delivery. In the case of epidemic isolation, the traditional offline sales model will inevitably be frustrated.

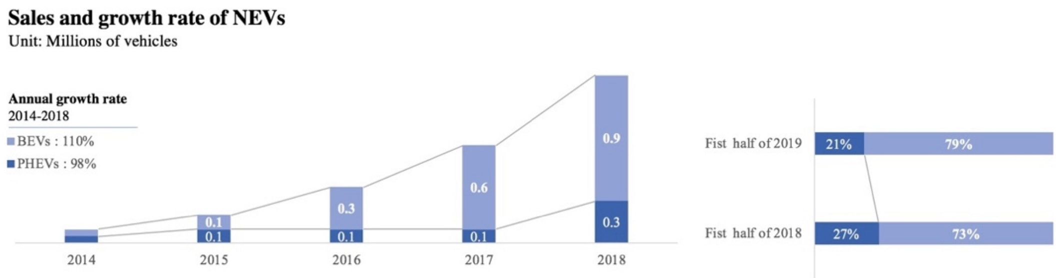
4 Practical Part

4.1 China’s EVs market development

BEVs and FCEVs will jointly dominate the development of China's NEVs market. BEVs will be the mainstream of the passenger car market, and PEVs are just a transition. FCEVs will be developed in the field of commercial vehicles; it is difficult to promote to the passenger car market in a short time.

Against the background of the overall downturn in the Chinese automotive market, the NEVs market is still developing rapidly. Figure 9 illustrates that China's NEVs sales reached 1.2 million units in 2018, with a growth rate of 71%, of which sales of BEVs accounted for about 75%, and the rest were mainly PHEVs. The sales of NEVs in the first half of 2019, increased significantly compared with the same period last year. Despite policy changes and NEVs subsidies have declined several times in 2019, the growth rate of NEVs fallen several times. (Guan, et al., 2019, p. 21)

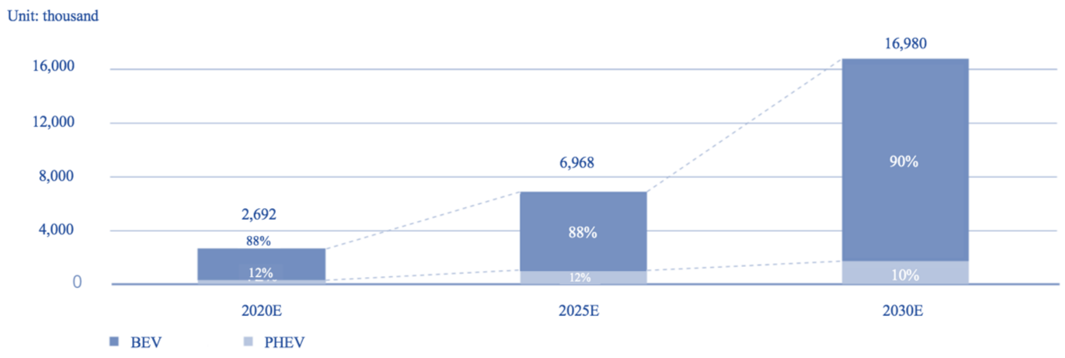
Figure 9: Market size of NEVs in China



Data sources: China Automobile Dealer Association, McKinsey, 2019

China's new energy passenger vehicle market will maintain relatively rapid growth. According to the forecast analysis of Deloitte's NEV market scale model (Hecker, Mou, Maennel, 2019, p. 3), the production and sales of pure electric vehicles in China will exceed 15 million in 2030, accounting for 90% of the total new energy sales, while the proportion of plug-in hybrid electric vehicles (PHEV) will be only 10%. (Figure 10)

Figure 10: Forecast of China New Energy Passenger Car Market Size



Sources: Deloitte., 2019

Hecker, Mou, Maennel (2019, p. 4) state that, NEVs are the best carrier of smart technology, which will help accelerate the transformation of new energy vehicles to intelligent products controlled by intelligent systems. Intelligent connectivity and human oriented design will bring novel development opportunities for NEVs, and OEMs and cross-industry players are prioritizing electric vehicles and connectivity investments to seize opportunities in the automotive revolution.

Trends 1: Consumers are embracing electric cars, and the market is shifting to consumer-oriented market

Consumers who bought EVs in the early days were more driven by policies such as restricted licenses plates and traffic restriction. As the Chinese government uses measures such as tax incentives, state subsidies, and free car license plates to encourage consumers to purchase domestic brands of NEVs. The sales of domestic NEVs currently account for the largest share in the Chinese market. KPMG (2017, p. 3-6) indicated that besides brand recognition, product quality and professional services are also two major reasons for car owners to buy a car. For potential consumers, brand recognition is key, followed by industry leadership and technological maturity in the field of NEVs.

Hecker, Mou, Maennel (2019, p. 4) pointed out that, with the rapid improvement of technology, the cruising range of EVs and the convenience of charging will no longer be the barriers to customer purchasing. The intelligent, connected and user-friendly functional design will become the keys to the differentiation of NEVs products. In

China, younger consumers are more receptive to new technologies, especially high-tech products that bring convenience to their daily life, such as mobile banking, social media and online shopping. Convenience is key to consumers' experience. Previous studies of KPMG (2017, p. 9) had emphasized that NEVs owners, especially potential customers, have new expectations for the functions of NEVs in the future. Their biggest expectation is that the new energy vehicles will be equipped with semiautonomous or fully autonomous features.

Hecker, Mou, Maennel's survey of energy vehicle consumers (2019, p. 4) found that about 70% of respondents expect that innovative technologies will be used to the maximum extent in electric vehicles. Intelligent technologies that improve driving safety are popular differentiated selling points. The smart big screen on the car, voice recognition and the humanized space layout to meet the needs of multi-functional travel are considered to be the distinguishing signs of electric vehicles and traditional fuel vehicles.

The outbreak of the Covid-19 pandemic has also strengthened people's awareness of protection, and the demand for owning a car of their own is also improving. At present, the domestic passenger car market still has great potential, and the base of people owning cars is much lower than that of foreign countries, and the demand for cars is increasing year by year.

Trends 2: EVs Competition Accelerates the Innovation of Commercial Mode

The rapid development and broad application of science and technology and the digital economy have become the critical factors for the innovation of the new energy automobile business model in China. The booming development of e-Commerce in China and the transformation of the new retail industry have brought new changes to the commercial model of the Chinese new energy vehicle market. To adapt to the change of the economic environment, both traditional OEMs and Emerging NEVs automakers gradually adjust their commercial models and develop new marketing strategies to be useful and practical.

With the size of NEV market increased, the enterprises are required to accelerate the innovation of commercial modes to win the market competition. Hecker, Mou, Maennel (2019, p.5) illustrated that the direct sales model is the most significant change and impact brought by the Emerging NEVs automakers NEVs automakers to the industry. By establishing new retail formats and services throughout the whole life cycle of users, they bring a unique brand experience to users and solve many disadvantages such as opaque price and poor service experience under the traditional dealer model. Mostly, car users like the new experiences that come with the direct-sales model, including transparent pricing and friendly in-store experience.

Trend 3: EVs Commercial models are growing in the "New Retail" environment

Jason Ding, et. al (2018, p. 9) states that, new retail requires brands to continually improve and reinvent themselves to adapt to new situations, new formats, and a steady stream of new ideas, thus establishing a new consumer-centric model and creating more efficient operations. As the digital economy evolves, the digital ecosystem online becomes a closed-loop of interacting with consumers, collecting data, and gaining insight to develop and deliver personalized marketing messages at customer touchpoints.

At present, the sales channels of NEVs are diversified, and the New retail model is overgrowing: (Jin, Guo, Hou, 2019, p. 14)

- <u>Traditional 4S dealership: </u>many traditional OEMs will adopt this sales model when they launch new energy vehicles, which can inherit the buying habits of users and give play to the resource advantages of old customers;
- <u>New 4S dealership: </u>auto companies adopt the partnership system to cooperate with dealers to establish an innovative 4S marketing model, such as WM Motor;
- <u>New retail:</u> the new customer-centric retail model creates an innovative sales network, typically, afford to the Emerging NEVs automakers enterprise. Automobile enterprise skipped the tiered dealers and directly adopted the offline experience plus online order mode. They have their marketing channels, better control of final prices, and optimize customer purchase experiences, such as Tesla and NIO. In addition to direct sales by car companies, some Emerging NEVs automakers NEVs automakers (such as XPeng) also cooperate with e-commerce platforms to sell, such as WeChat, Tmall, and UCAR. In terms of the feasibility

of building sales channels, the difficulty and cost of building a new retail model are much lower than the traditional dealer model. The Emerging NEVs automakers NEVs automakers only need to deploy a small number of offline experience stores and develop their apps or establish cooperation with well-known e-commerce companies to achieve online sales.

eCommerce

Mobile shopping in China has been driven by major social media ecosystems that have had their own integrated local e-commerce and digital payment platforms for years to make purchases easier. Wechat, for example, provides video ads for brands that link to microtrust's storefronts. This allows consumers to chat and shop at the same time, completing purchases without leaving the App. (NICOLON, 2020)

As a result, "contactless" online purchases will become a trend, saving consumers the time and cost of purchasing, which is convenient and fast. At present, some auto companies have introduced a chief equity officer responsible for providing customers with transparent information and a good purchase experience in their distribution system, in order to fully protect the rights and experience of consumers in the purchase process. During the epidemic, the emerge car company with digital marketing genes also relied on their original advantages to practice new business models such as online car viewing, online car purchase, and online diagnosis at the fastest speed.

Trend 4: Omnichannel retailing innovation to create a new customer experience

The new retail transformation (including direct sales model) is the general trend of the development of the automobile industry, which is inevitable and irreversible. Finding the best balance between user experience and cost efficiency through Omni-environment is the key to successful transformation. (Hecker, Mou, Maennel, 2019, p.5) New energy vehicle brands are creating occasions that are not limited by time and place, expanding to a fully integrated seamless omnichannel consumer experience. (Jason Ding, et al., 2018, p13-14)

Developing omnichannel distribution has become an industry-standard, preferably to reach and serve consumers. Automobile enterprises analyze consumers' preferences for channels in each part of the purchase decision-making process. Meanwhile, make full use of the existing offline resources and use their own digital ability to optimize online information acquisition and service experience with dealers and commercial platforms. Wood (2020, p. 8) addressed that digital channels provide consumers with access to inspiration, information, and efficient remote purchases. The physical location allows the consumer to view, touch, try, and evaluate the product. According to McKinsey's report, Guan, et al. (2019, p. 35) indicate that offline channels still play a significant role in the consumer decision-making process of car purchases. However, most online channels always cannot satisfy consumers, so the marketing of car enterprises still needs digital transformation.

4.1.1 Marketing touch point of consumer

Multi-form offline channels that are closer to users. For NEV brand, offline is still an important node for user experience and sales conversion. Being closer to users to a greater extent means higher brand/product exposure and more sales opportunities. Breaking the traditional large and comprehensive, rigid and integrated 4S service concept, adopting new retail formats such as pop-up stores, store-in-shops, branded guerrilla stores, special exhibition areas, and even mobile sales teams, close to the user's daily high-frequency activity scenes. The fastest, most timely, and lowest-cost way to establish the connection between the brand and the user, enhance the experience and accelerate sales conversion. At the same time, new retail formats-auto supermarkets, auto hypermarkets, etc. can also be used to increase the opportunities for users to switch from competing products.

Automobile manufacturers represented by new energy brands are actively exploring the application scenarios of various digital tools to create unique shopping experiences for customers. This aspect caters to the needs of technology enthusiasts and also enables manufacturers to collect valuable information and first-hand customer data. Today, various digital tools have been widely used in brand offline stores, including facial recognition, augmented reality/virtual reality, mobile applications, etc., to provide customers with a refreshing car shopping experience.

4.2 Case studies

In China, most of the emerge NEV automakers represented by high-end independent brands such as NIO were born in the mobile Internet era. As of the end of 2018, there have been more than 50 emerging NEV automakers, showing a trend of large-scale outbreaks. Traditional OEMs have also entered an era of transition, such as BYD, the leader of new energy vehicles in the Chinese market. With the increase in consumer awareness and demand for NEVs, the development environment of the NEVs market has gradually changed traditional OEMs and has triggered foreign brands to spy on China's NEVs market, and gradually launched pure electric vehicles in China. This undoubtedly brings challenges to domestic independent brands. Furthermore, the author hopes to provide suggestions and enlightenment for transforming the traditional OEMs NEV brand marketing strategy and putting forward the marketing techniques reference for the future marketing promotion of the NEV brands.

4.2.1 Case: NIO Marketing strategy and marketing techniques

NIO should be regarded as China's earliest emerging NEV high-end automakers. From the day it was born, it has been targeting Tesla. This strategy has benefited the brand so much that when many people think of China's Tesla, they first think of it: NIO.

NIO, build smart electric vehicles, provide premium services and create innovative charging solutions. First of all, NIO held its "NIO" brand launch in London and released the "world's fastest electric supercar" - EP9, at the same time to establish a high-end brand image. After that, mid-range electric vehicle ES 8 will be launched. It is planned to launch entry-level EV later, establish high-end brand value with EP9, and then use to empower downward to achieve large-scale sales.

NIO also empower an inspiring community of users, where they can share joy and grow together. NIO claims to be committed to becoming the first "user enterprise" in the world. By operating the user, NIO is building the user economy (Fans economy) and enables users and enterprises to grow together, which is also the essential difference between its business model and traditional car enterprises. Its business model and marketing model are also the most significant achievement and influence among Chinese new energy vehicle brands.

Through online and offline dimensions, NIO creates exclusive community culture for users, and creates unique personalized tonality of the brand, so that more users will be unconsciously attracted, so as to enhance the brand awareness of NIO. Depends on the consumers' decision-making path, the author will analyze the marketing strategies and techniques, which are penetrated into the consumer journey.

Offline Attract: City showroom

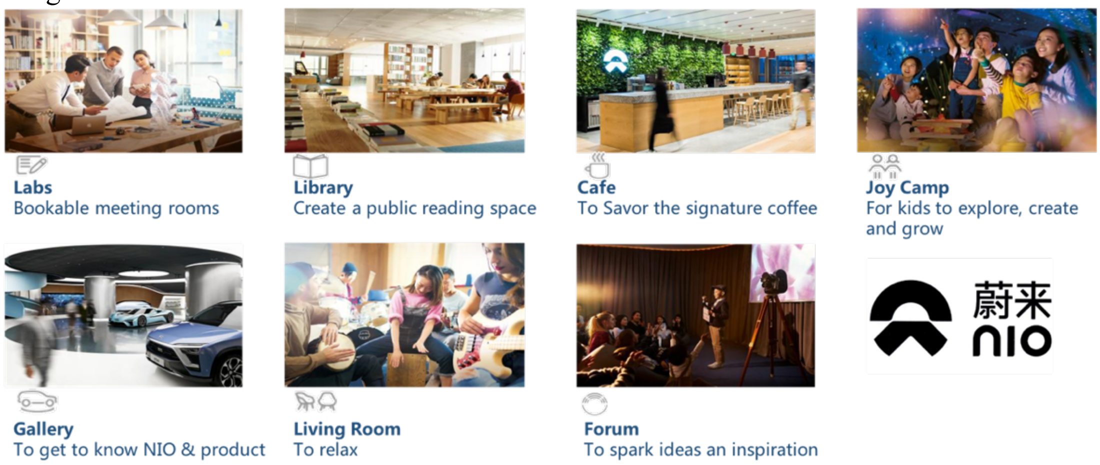
The marketing/channel mode of most emerging NEV auto maker is E-commerce + Retail, but the problem is that the layout of retail store is slow, low coverage, high cost, which affects the car sales. In China, NIO has transformed its car showroom into an exclusive interactive community for customers, creating an unparalleled brand experience for customers. NIO adopts the direct sales model of offline experience plus online purchase through the sales model of dealers. As an offline experience store, NIO Center has opened in many cities (Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, etc.). Once consumers decide to purchase, they could place an order through the APP or the official website, linking offline experience, car pickup, and service with online ordering, in order to building a new retail model system.

Image 1: NIO House: city showroom

Source: NIO.com

The NIO House, with 7 core functions, is a lifestyle community where NIO users share happiness and grow together. The physical stores are close to the user’s lifestyle, creating a comfortable and interesting "home" for them, and closely connecting users with NIO brand. The physical stores create a relaxed, leisure and interactive visiting experience for consumers, highlighting the brand concept.

Image 2: NIO House 7 functions



Source: NIO.com

Online Attract: WeChat HTML 5 Brochure interactively connect online and offline (O2O)

Social media advertisements help to increase brand awareness. Even if a user doesn't click the advertisements, after seeing it, the audient may spend time reading about the business and learning what it has to offer. Especially during the pandemic time, people could receive the H5 link from Official WeChat Accounts articles or service or shared from "Moments".

WeChat is the social media platform with the largest number of users in Tencent's business, and it has been fully integrated into people's lives. In 2017, 87.6% of users used WeChat the most frequently, and 81.5% of users used it for more than 1 hour a day. (Kantar Media CIC 2018) With the success of WeChat, one of the latest trends in the ever-evolving digital marketing world is HTML 5 content, which allows developers to create interactive materials for marketing campaigns. H5 pages have become an important asset for successful advertising campaigns. (Gentleman Marketing Agency, 2021)

H5 page is a mobile website, mainly a promotion or event website, shared with people on WeChat through the official account or WeChat Moments. Then, people can browse the website using the WeChat in-app browser. H5 pages can be used for various marketing applications, such as games, brochures, advertisements, etc. This is why they are often used to market specific products or to promote sales and other special events. This marketing technique is highly attractive, most of the time is interactive, including audio, music, video animation, etc., is a good way to capture potential customers.

Image 3: NIO H5 page campaign

Source: screenshot from NIO WeChat official Mini Program

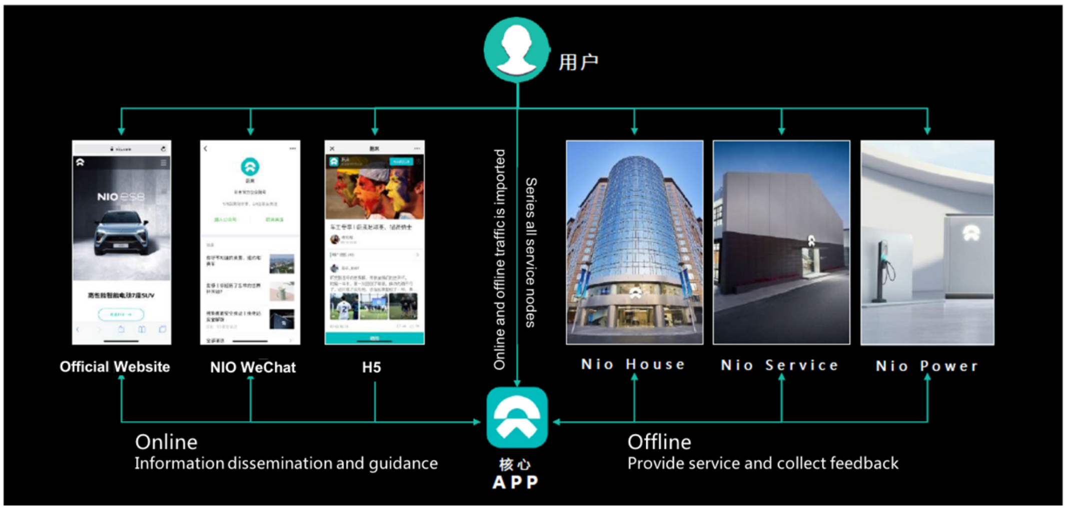
NIO use H5 page which contain interesting test and to attract WeChat user. Through the interesting "NIO Genetic Test"(Image 3), users are guided into the NIO Auto World. NIO products are recommended based on the results, which cleverly resonates with participants, thereby better enhancing the impact of the campaign.

NIO APP marketing technique

NIO aim to provide consumer high quality service and maintain customer relationship, mainly centering on NIO App, which connects the whole link of service nodes in the decision-making path of consumers. Combined with regional characteristics, NIO provides high-quality services for car owners and realizes the maintenance of core user relationships.

NIO's services and maintenance of car owners are very high in intensity and frequency. With NIO App as the core service node of the omnichannel, it provides high-quality services for car owners in combination with regional characteristics and realizes the high-frequency maintenance services for core users. As shown in figure 11, NIO App could provide information dissemination and guidance connect to Online touchpoints (Official Website, NIO WeChat, H5 page), and provide service and collect feedback at the offline touchpoint (NIO House, NIO Service, NIO Power). Consumers could use NIO App to obtain information and service along with their buying journey, and at the same time NIO App could gain the import traffic directly.

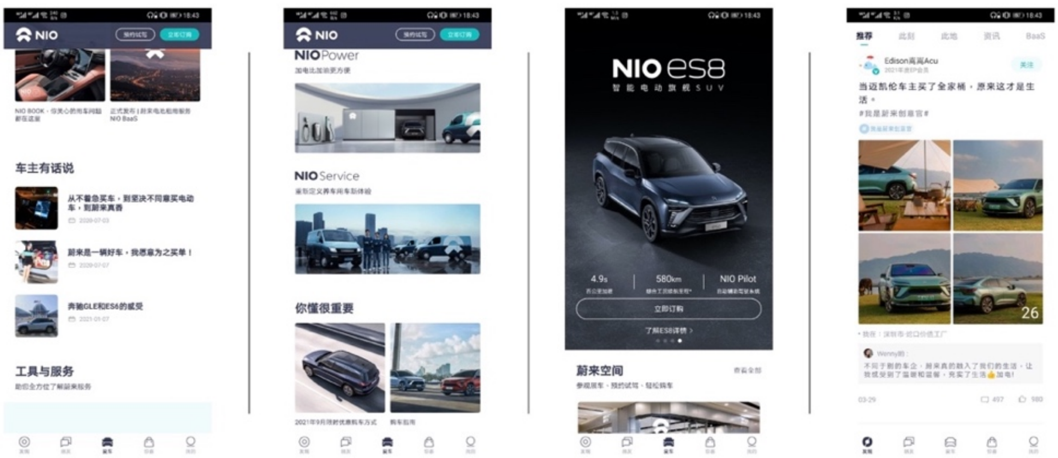
Image 4: NIO APP omnichannel marketing management



Source: screenshot from NIO APP

Create a community of highly sticky users through NIO App, achieve the circle effect with interesting interaction mechanism, and make NIO brand more widely recognized. NIO App has four major functions: Discover, Friends, Service, Mall, keep in touch with users through community information, and enhance user engagement through points mall and referral mode.

Image 5: NIO APP function



Source: screenshot from NIO APP

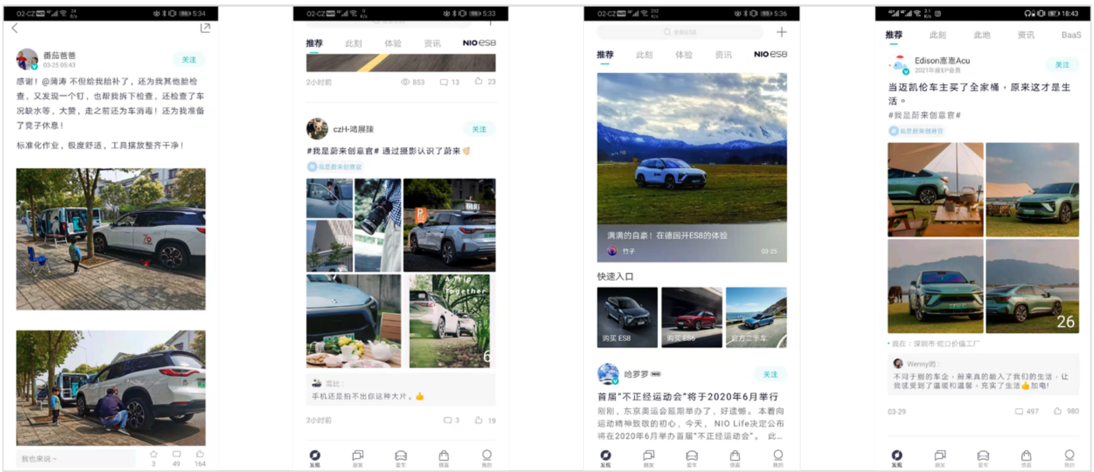
China's smart car user base has grown several times over the past three years, and NIO is in a clear lead among the new car makers. The NIO App had 367,000 monthly active users as of July 2021, up 54.2 percent from the same period last year, the highest among the new car makers in China, according to a report by market research firm (QuestMobile, 2021)

Advocate: Official mobile APP NIO community

In terms of user operation and marketing models, NIO pays attention to user participation. Focusing on this core, NIO is also different from traditional auto companies in terms of communication paths, products, and user relationship operation and maintenance. From the perspective of the communication path, NIO focuses on social communication channels, and has constructed a communication ecology centered on the corporate APP community and supplemented by "We-media" (Weibo, WeChat, Douyin, etc.) Different channels target users and communication purposes are not the same.

The APP community is an incubator of word-of-mouth communication, and it is also the communication position that NIO attaches the most importance to. It is different from the one-way output advertising model of uploading and issuing. It relies on word-of-mouth communication, acquaintance introduction and other strong relationship of word-of-mouth communication, which is in terms of user growth efficiency and cost.

Image 6: NIO APP "Discover" function



Source: screenshot from NIO APP

NIO App invites users to participate in NIO's offline activities and attracts users to actively spread high-quality activities through NIO App, so that more people can know the good reputation of NIO brand. Users actively upload context to “Discover” section, share experience to the NIO App community, which could stimulate other users to participate in App and offline activities.

4.2.2 Case: BYD Marketing strategy and marketing techniques

BYD is a leader in new energy vehicles in terms of domestic brand; In terms of professionalism and safety of new energy vehicles, the company is in the leading position in China and has won a good reputation and trust from consumers. Despite the downward trend of the automobile market, the total production and sales of new energy vehicles for passenger vehicles have exceeded 800,000 units, and breakthroughs have been made in the core market, dual-limit and non-dual-limit markets. The market share of first-tier cities such as Beijing, Shanghai and Shenzhen have continued to increase, and remains stable at around 20-40%. (BYD, 2020)

In terms of management, digital transformation has been gradually realized in all online work, and digital management, marketing and operation have been created with users as the first priority. Offline also strengthen the service channels of owners' clubs and car friends' associations, we work with dealers to link the majority of owners to participate in all kinds of car owners' activities and introduce the "Di Fans" policy to support the majority of car friends to become stronger and bigger.

Live streaming E-commerce： Group buying campaign during pandemic

Because of the epidemic, BYD has also made great progress in terminal services. In order to facilitate users to see the car, BYD provides a series of online services, or through network streaming to carry out marketing promotion, so that users can more intuitively understand the configuration and corresponding highlights of the product.

We media marketing：with impact Weibo content

The Weibo marketing of BYD throughout 2020, BYD Auto Weibo has tried its best to visually integrate Dynasty car series with Chinese elements in every theme activity.

Copywriting creativity to promote traditional culture, highlight the Content of Chinese characteristics as the keynote, auxiliary activities to attract prizes, always can cause a heated discussion of fans. Such as hashtag # Guochaofeng ## China Beauty, Legitimate Red# and other content have aroused a hot discussion, with a total reading volume of over 100 million and discussion degree of over 1 million. They stand out from the auto We-media and win recognition in the marketing circle.

Image 7: BYD We-media marketing key visual

Source: BYD Auto Weibo

Based on the psychological insight of BYD Auto Weibo fans, BYD auto Weibo can extract independent auto brand campaign strategies of Chinese traditional culture and based on a strategy in a series of more systematic, stylized theme activities, raising the image of BYD, which touch to the fans of patriotic, obtain all agreed. Empowering Chinese traditional culture is not only a choice of marketing strategy for BYD Automobile, but also a cultural inheritance and development of national enterprises.

On the other hand, BYD auto is also actively exploring the younger brand image, in terms of products, the development of younger and trendier E-series, Yuan, Qin and other product lines. In terms of marketing techniques, it takes We-media (WeChat, Weibo, Douyin) as the main line to carry out multi-platform full matrix operation. In terms of creative content, it takes advantage of the hot topic on the Internet and socializes content, visual presentation, creativity and other aspects to touch the life of the young generation, trigger emotional resonance and enhance brand attractiveness.

As one of the first independent auto brands to enter Weibo, after years of operation, BYD Auto has more than 2 million fans on Weibo and has been recognized by the industry for many times. However, when the audience's attention is scarce and the marketing environment is changing rapidly, it is increasingly difficult to maintain brand vitality and not be abandoned by users. How to carry out the brand rejuvenation iteration, communicate deeply with the emerging fans, whether there are more interesting and novel ways of communication, and take the express train of "youth marketing" are the problems that BYD Auto Weibo has to face.

Under the influence of the environment of The Times and the revival of cultural genes, the culture of "national style and national tide" emerged, and young people's dedication to patriotism and love of Chinese cultural symbols become more and more obvious. BYD Auto Weibo insight into the "Gen-Z" of the identity of the national culture, to take advantage of Chinese characteristics of high-quality content, brand collaboration and other ways to deepen the image of domestic independent brand BYD, to improve brand influence; By taking advantage of different types of Traditional Chinese culture, we can carry out secondary creative communication and arouse more young people's attention and discussion on Chinese culture.

4.3 Case study overview

At present, most of the emerging NEVs automakers try to operate users through "APP+ self-operated store system + long-term service", which has advantages over traditional OEMs. However, the connection between brands and users is not firm at present, and it is necessary to realize strong links to users and subsequent multiple transformations through the refined operation of the Internet. The system, capacity, channels and brand reputation formed by traditional car companies for many years are still their advantages, while the advantages of new forces in intelligent and innovative service system are also the main reasons for traditional car companies to feel the pressure of competition. The future has its challenges for different players in the industry. The author will conduct a market survey on consumers and try to find out more attractive and effective marketing techniques for consumers. The goal is to form a lifelong connection and service between the brands and consumers.

5 Results and Discussion

5.1 Marketing research

As of the third quarter of 2018, nine regions in China had introduced restrictions policies on the purchase of ICEVs, including first-tier cities being the most effective enforcement areas. On this basis, according to the actual situation, each region has given the EVs unlimited travel, unlimited purchases, free parking fees, free tolls, and other preferential measures. (An, et al., 2019) In the case of a low probability of obtaining the ICEV license plate number, EVs have become one of the major purchase options for consumers in first-tier cities.

Guangzhou, as one of the first-tier cities, has no restrictions on the traffic and purchase of new energy vehicles, trial to facilitate parking in the central city, and reductions in tolls for some city highways and expressways. Therefore, there is an increasing demand for new energy vehicles. However, as the subsidies for the purchase of new energy vehicles decline, it will more or less affect consumers' purchasing decisions. Consumers will gradually shift their demand to the product itself, and more consider whether it is consistent with their own needs. Starting from the consumer survey in Guangzhou, the author analyzes consumers' needs for new energy vehicles based on the questionnaire survey results, describes the portrait of new energy vehicle consumers and their purchase path, and then proposes effective marketing strategies.

The marketing research is including two significant parts: questionnaire surveys and qualitative research. This questionnaire is a survey of consumers’ preference for new energy vehicles and their marketing preferences, which related to three parts:

- Demography of consumers;
- Consumers’ preference for EVs;
- Consumer behavior and attitude towards marketing techniques.

The questionnaires consisted of 30 questions and were done in the Chinese language because of the thesis is targeted the Chinese market. The marketing research has been performed in Guangzhou, China, via social media WeChat, Face-To-Face, and some by emails. It has been estimated to send this questionnaire to only 200 persons to collect quality data, and there are 178 random samples available. The respondents were consumers who settled in Guangzhou. The questionnaire was intended by 101 males and 77 females, which from the age of 18 to 60. The result is processed by the author's own in Excel. The author also did the qualitative researches by interviews via voice call and video call, with ten respondents who were willing to do and left the contact messages. The relevant translation of questionnaire and interview can be found in the appendix.

5.2 Results of questionnaires research

The first part of the questionnaires is demographic of respondents. Question 1 to question 6 were related to the age, gender, education level, occupation, income, and family status of respondents. The result can be seen in the following table (Table 3).

Table 3: Result of question 1-3, question 5-6: demography

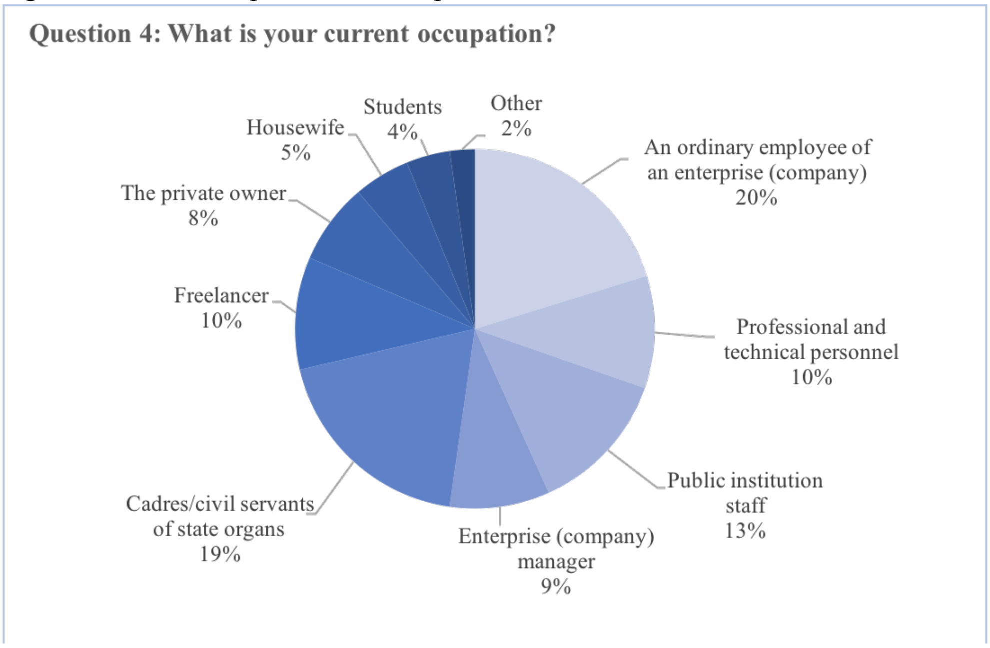
	Question 1		Question 2		Question 3		Question 5		Question 6	
	Responses	%	Responses	%	Responses	%	Responses	%	Responses	%
Option a.	25	14%	101	57%	9	5%	9	5%	61	34%
Option b.	85	48%	77	43%	18	10%	12	7%	71	40%
Option c.	38	21%			27	15%	22	12%	41	23%
Option d.	23	13%			80	45%	38	21%	5	3%
Option e.	7	4%			39	22%	51	29%		
Option f.					5	3%	46	26%		
Total	178	100%	178	100%	178	100%	178	100%	178	100%

Source: own processing

The result of question 1 shows that among 178 random samples, most respondents were 23-35 years old. This group represents 48% of all respondents. The second large age group of respondents between 36-45 years old represents 21%, and the younger group between 18-24 represents 14%. The age group between 46-55 represents 13% and older than 55 years old accounts for only 4%. These respondents mostly were Millennials ("80s" and "90s"), which represents more than two-thirds of all respondents (total 83%). The questionnaires were mainly performed by social media and networks, which can prove that the young generation group is the primary audience of social media and digital marketing communication channels.

The next two questions were related to the gender and education level of respondents. Out of 178 respondents, 101 were men (57%) and 77 women (43%). Most of the respondents have high academic qualifications, including 45% for bachelor and 25% for master and higher degrees.

Figure 11: Result of question 4: occupation



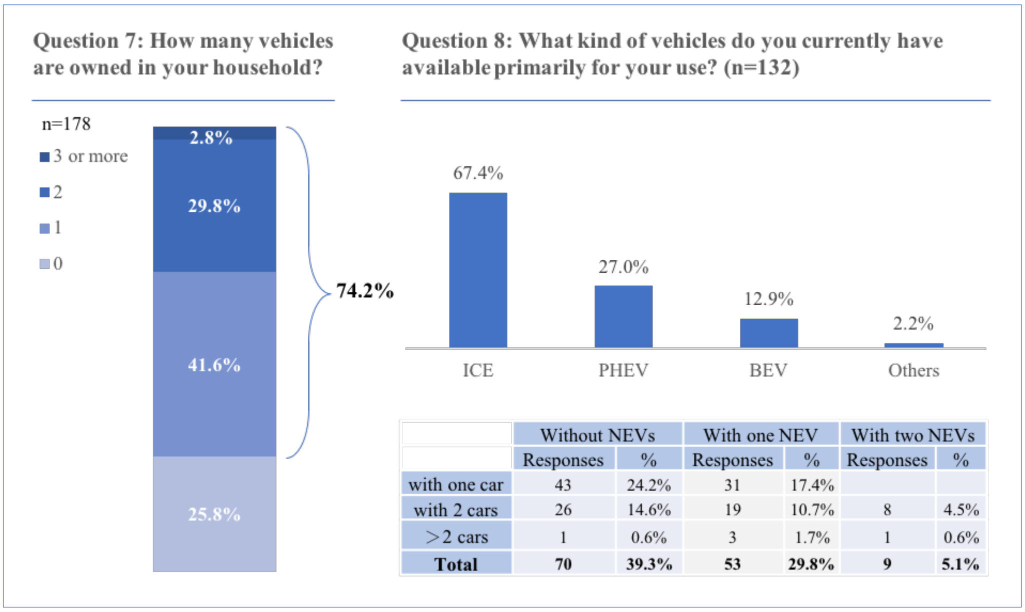
Source: own processing

The result of questions 4 (Figure 11) to question 6 shows that among all respondents, those whose jobs were ordinary employee and manager of enterprises accounts for 29%, civil servants 19%, public institution staff 13%, professional and technical personnel 10%, the private owner 8%, with medium and high income. More than two-thirds of people are married, including around one-third of the family with children (34%). According to the above results, the primary information of these respondents is consistent with the characteristics of NEVs current or potential consumers.

The second part of the questionnaire survey is consumers' preference for electric cars, which from question 7 to question 16 related to the car ownership of consumers, their knowledge of NEVs, and the demand for new energy vehicles. Question 7 and question 8 focus on the car ownership of respondents, which can be seen from the figure (Figure 12). The group of 46 respondents without a car account for 25.8%. By contrast, 132 respondents owned cars (74.2%). Among the respondents, ICEV owner accounting for 67.4%, those who have NEVs account for an apparent proportion, including 27% for PHEV and 12.9% for BEV. The result of question 9 was related to car usage of the car owner, which can prove that it is mainly for urban life, while less long-distance travel.

Out of 132 car owners, those who use their car for personal daily work and travel in the city represent 97%, most of them are the younger generation. Besides, older people accounted for a more substantial proportion of respondents who chose to use their cars for their families.

Figure 12: Result of question 7 and question 8: ownership of personal vehicle



	Without NEVs		With one NEV		With two NEVs	
	Responses	%	Responses	%	Responses	%
with one car	43	24.2%	31	17.4%		
with 2 cars	26	14.6%	19	10.7%	8	4.5%
>2 cars	1	0.6%	3	1.7%	1	0.6%
Total	**70**	**39.3%**	**53**	**29.8%**	**9**	**5.1%**

Source: own processing

According to the proportion of answers to questions 7 to 8, 29.8% own two cars, and 2.8% own more than two cars out of 178 random samples. Around one-third of all respondents have NEVs represents 34.8%. Among the respondents with two or more cars, those who have at least one NEV accounted for 17.5%, more than those without NEVs (15.2%). In words, most of the car owners from respondents prefer NEVs as their second car rather than ICEVs. The result of question 10 (Table 4) also can once again prove this status, those who buy NEVs as an additional car represents 16.3% of all respondents.

Question 10 to 13 focus on the respondents' demand and attitude toward electric cars, especially BEV, and the result can be seen in the following table (Table 4). The result of question 10 also can prove that those respondents who have electric cars represent 34.8% of all respondents and 65.2% of all respondents without an electric car. Approximately 66.8% of the respondents considered buying electric vehicles (PHEV 43.8%, BEV23%) when they recently purchased a car, and even 82% of respondents indicated that they would decide or consider buying a BEV in the future, which shows that BEV is becoming more and more accepted in the market and will be a trend.

Table 4: Result of question 10 to question 13

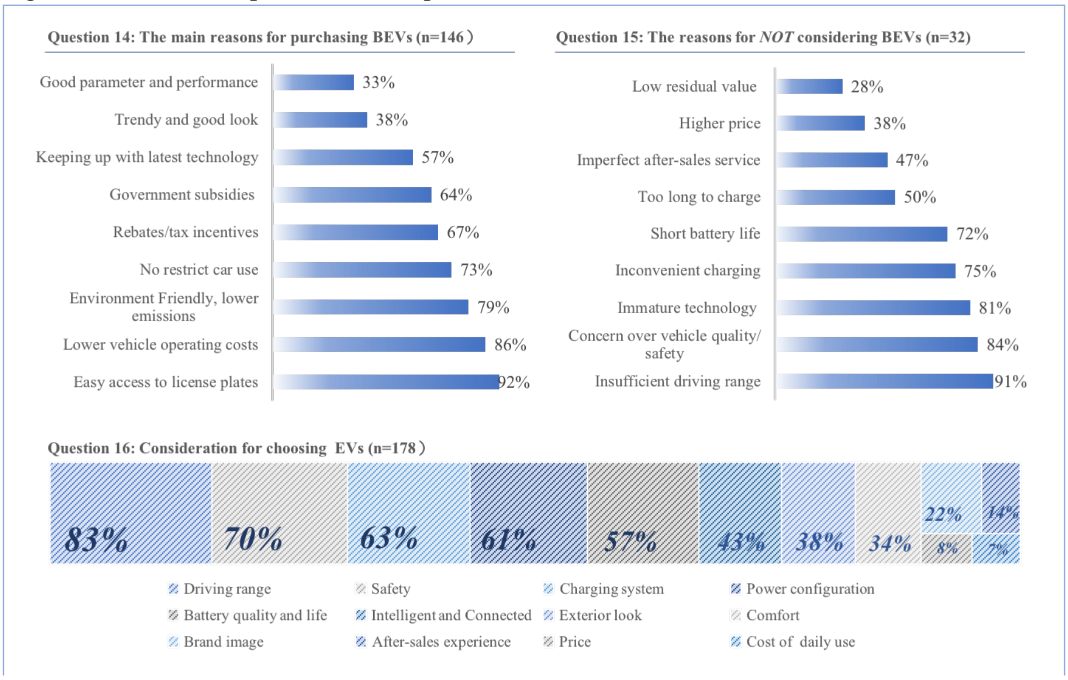
	Question 10		Question 11		Question 12		Question 13 (n:146)	
	Responses	%	Responses	%	Responses	%	Responses	%
Option a.	31	17.4%	56	31.5%	77	43.2%	104	71.2%
Option b.	29	16.3%	78	43.8%	69	38.8%	127	87.0%
Option c.	2	1.1%	41	23.0%	32	18.0%	56	38.4%
Option d.	116	65.2%	3	1.7%				
Total	178	100%	178	100%	178	100%	287	197%

Source: own processing

When people considering buying a BEV, those who prefer traditional domestic brand accounts for the most proportion 87% of all respondents, compared with the Sino-foreign joint venture or import traditional brand 71.2% and the emerging startup brand 38.4%. (Question13) In recent years, as Chinese domestic traditional OEMs have paid more attention and invested in product quality, consumers' positive evaluation of traditional domestic brands is gradually increasing. In addition to the advantages of cost performance, Chinese brands are still people's primary choice. The energetic brand influence of foreign brands and joint-venture brands, coupled with the new energy product layout gradually entering the Chinese market, still occupy most people's initial selection list. As Emerging NEVs automakers enter the market, consumers remain on the sidelines. In order to enter the primary menu of consumers, NEV enterprises need to improve consumers' brand level awareness.

Out of 146 respondents who considering BEVs, the results of question 14 (Figure 13) shows that lower emissions account for 79%, as well as lower operating costs 86%, are the primary reasons consumers consider BEVs. Despite the increasing consumer environmental protection concepts, China's NEV market is still mainly driven by tax reductions and price subsidies. Respondents are more concerned about the probability of accesses license plate (92%) and traffic restriction (73%). Since passenger cars are mostly for their use, the cost of use is also a significant consideration in consumer decision-making. Low operating cost is one of the apparent advantages for urban short-distance use, especially for the young generation.

Figure 13: Result of question 14 to question 16



Source: own processing

For new energy vehicles, economical and driving experience are their natural advantages and have become an important selling point of products. Question 15 was related to the reasons for not considering the purchase of BEV, and it also illustrates the disadvantages that the people believe. The insufficient driving range is the core pain point of the consumer, which represents 91% of people who not considering BEVs. Always, the driving range relates to the battery system, battery quality, and charging facilities. Inconvenient charging (75%), short battery life (72%), and long charging time (50%) are barriers for consumers to recognize electric vehicles because consumers are not familiar with NEV automotive technology development, especially the BEV products. The problems of electric car's frequent exposure by social media such as short-range and spontaneous combustion have made consumers very worried about the safety of the electric vehicle. Almost up to 84% concern about vehicle quality, also 81% concern about immature technology. Therefore, to build the consumers' trust in the brand and product safety will help to achieve a market breakthrough.

According to the results of question 16, range, safety, power, and battery life are the most prominent concerns of consumers when they are buying EVs. With the progress of battery technology and the improvement of the charging network, consumers will pay less attention to battery life, but battery life is still the most prominent concern of consumers in the short term. Users' requirements and demands for other aspects are arising in addition to transportation needs. Intelligent and connected configuration and exterior look have also gradually become the focus of attention, which represents 43% and 38% of all respondents. A growing number of consumers, especially millennials, are embracing automated, intelligent, connected car configurations.

Table 5: Result of question 17 to question 18

	Option a. Strongly disagree		Option b. Somewhat disagree		Option c. Neither agree nor disagree		Option d. Somewhat agree		Option e. Strongly agree		Total	
	Responses	%	Responses	%	Responses	%	Responses	%	Responses	%	QTY	%
Q17.	14	8%	25	14%	32	18%	57	32%	50	28%	178	100%
Q18.	11	6%	21	12%	67	38%	47	26%	32	18%	178	100%

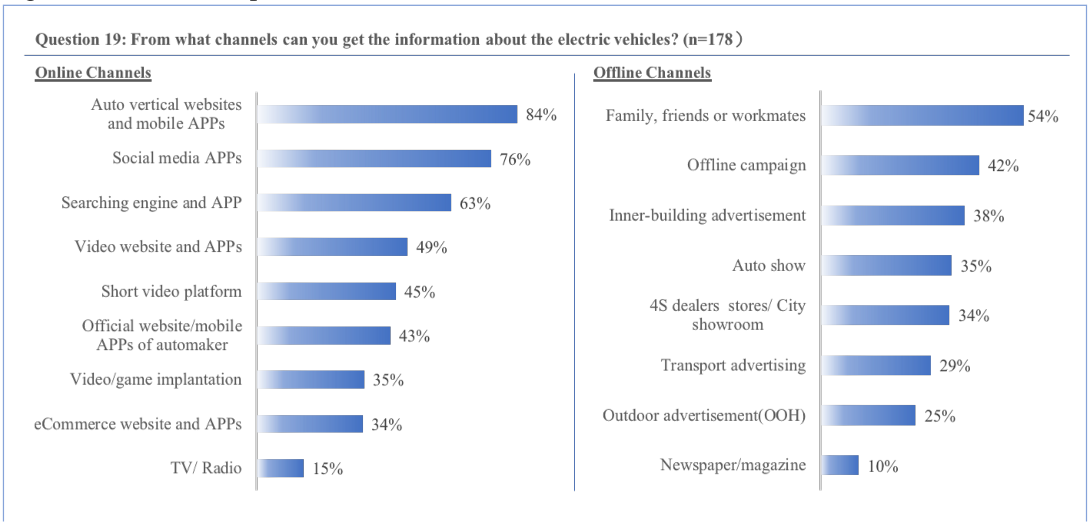
Source: own processing

Question 17 to question 18 focuses on the consumers' attitude toward the technology and customized configurations service. More than half of all respondents (60%) are embracing the EVs, which is autonomous, with maximum communication capabilities, electric, friendly, comprehensively patronizable, and willing to pay extra fees for them. Although 44% of the respondents, mainly millennials, think that they would customize a car when buying one. More than half of the respondents (56%) still believe that they do not care and do not need customized service.

Millennials are the most likely to make purchase decisions based on values and principles (personal, social, and environmental). Since large-scale intelligent, customized car service platforms are still in their infancy, penetration and popularity among consumers are relatively limited. With the development of customized platforms, consumers' demand for customized car purchases should be more vigorous. Combined with the previous case analysis, it can also prove that the online customized service platform is also an active marketing communication channel and technique.

The third part is related to consumer behavior and attitude towards marketing techniques. It has become a norm for consumers to obtain information through multiple channels (including seamless integration of online and offline channels). Online channels have deep penetration in all aspects of car purchases. The results of the survey show that automobile vertical information websites, portal websites, and search engines are the main channels for car buyers to obtain information on NEVs.

Figure 14: Result of question 19



Source: own processing

The result of question 19 (figure 14), word-of-mouth (WOM) and online auto verticals are the leading channels through which brands influence consumers' initial purchase considerations. With the digitization of society, people can find it more accessible to get information on the internet. Out of 178 random samples, 84% of people get the information about EVs through auto vertical websites, which can obtain relatively comprehensive information including media information, vehicle configuration and parameters, dealer network information, automotive finance, other post-market services, and other functions. Searching engines like Baidu, Sougou, which account for 63%, and the group of brand official websites or mobile apps represent 43%. People prefer to compare the price and promotion of EVs between different eCommerce platforms accounting for 34%. The audience can passively receive the information of EVs from video streaming platforms account for 49%, and from the implantation advertising of video or game represent 35% of all respondents.

Even though the mass media occupies a particular proportion, but most were digital platform. According to the result, traditional mass media (TV, radio, newspaper, magazine) account for relatively small proportions. However, people can obtain information about EVs through offline advertisements around their life circle. Inner-building advertisement represents 38% of all respondents, which including printed or digital elevator advertisements in their office and house building. Also, the transport and outdoor advertisement have the same function as inner-building advertisement, which could subtly influence the customer.

WOM is including face-to-face WOM, such as the persuasive communication between the social relationship of family, friends, workmates, and other relationships. About 54% of all respondents get information about EVs from their families, friends. About 34% of respondents obtain information about EVs by consulting the sales assistants in the dealer stores or city showrooms. (Question 19, figure 14)

Table 6: Result of question 20-21, question 23-24

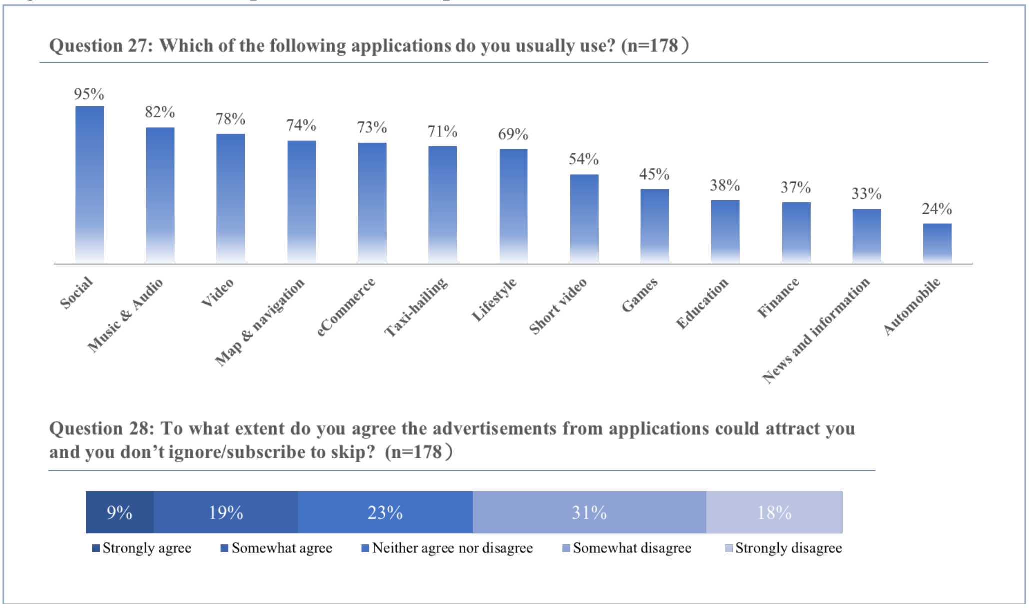
	Option a. Strongly disagree		**Option b.** Somewhat disagree		**Option c.** Neither agree nor disagree		**Option d.** Somewhat agree		**Option e.** Strongly agree		**Total**	
	Responses	%	Responses	%	Responses	%	Responses	%	Responses	%	QTY	%
Q20.	16	9%	32	18%	43	24%	48	27%	39	22%	178	100%
Q21.	21	12%	34	19%	51	29%	43	24%	29	16%	178	100%
Q23.	11	6%	25	14%	39	22%	55	31%	48	27%	178	100%
Q24.	18	10%	25	14%	37	21%	61	34%	37	21%	178	100%

Source: own processing

WOM also includes e-WOM (online), such as the communication between SNS, consumer, media, KOLs, and so on, by expending positive and persuasive content via social media platforms. In China, efficient marketing planning links social media, content and video branding to e-commerce and omnichannel retail/sales opportunities to better influence consumer purchase decisions. About 76% of respondents can get information about EVs from social media platforms. (Question 19, figure 14) As the result of question 20 and question 21 (Table 6), more than 58% of the respondents thought that social media (including Weibo, WeChat, QQ, Zhihu, etc.) marketing could influence their decision-making when they consider buying an EV, and people who are optimistic about short videos and live streaming platforms (including Douyin/Tiktok, Kuaishou, Tmall/Taobao Live, Hupu, etc.) account for 69%. The short video and live streaming will be a new trend in digital and social marketing.

According to the respondents' proportion to question 27 (figure 15), people use social applications the most, which represents 95%, music and audio application 82%, video streaming application 78%, eCommerce application 73%, short video (live video) application 54%. Because of the widespread use of mobile phone applications in China, it has become an important marketing communication platform for NEVs. The variety of advertising forms in the application has an incredibly subtle effect, but almost half of the respondents still choose to ignore or choose the subscription function to avoid advertisement. (Question 28, figure 13)

Figure 15: Result of question 27 and question 28



Source: own processing

People's lives are inseparable from social platforms, mostly social communication platforms, short videos, live broadcast platforms, or even e-commerce platforms. According to the result of question 29 (Table 7), more than 71% of the respondents would like to share their experience, opinion, and recommendation by using the social platform. People are willing to share their opinions and experiences with their related people, including 'F-factors', workmates, or salespersons' customers. When people consider buying an EV, they often pay attention to evaluating the car owner or KOL in their purchasing process and before their decision-making. However, it does not mean they trust all the information from the shares or channels.

Table 7: Result of question 29 to question 30

	Option a. Strongly disagree		**Option b.** Somewhat disagree		**Option c.** Neither agree nor disagree		**Option d.** Somewhat agree		**Option e.** Strongly agree		**Total**	
	Responses	%	Responses	%	Responses	%	Responses	%	Responses	%	QTY	%
Q29.	5	2.8%	19	10.7%	26	14.6%	75	42.1%	53	29.8%	178	100%

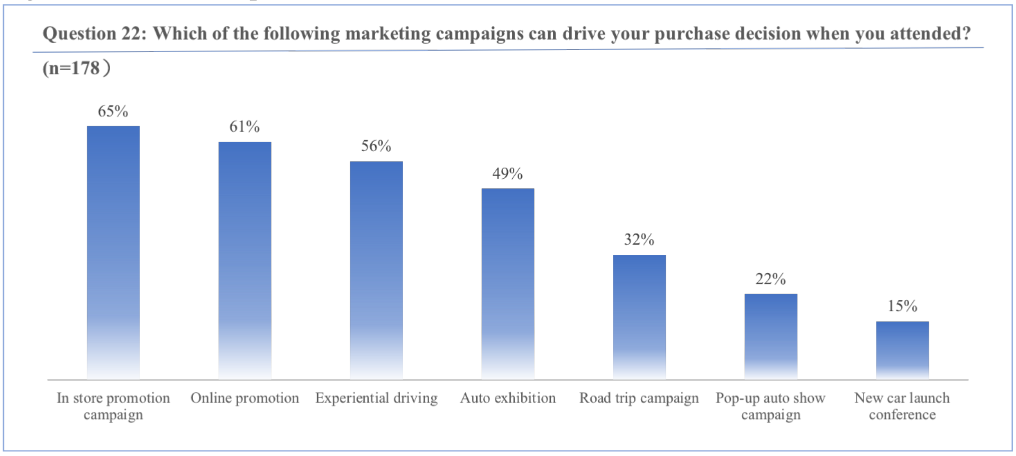
Q30. To what extent do you agree that the information in the following marketing communication channels is reliable and can provide you with good suggestions for the process of buying EVs?	**Average Mark**
a. Friends and family	4.32
b. Review site	4.16
c. Internet/Website	3.79
d. Brand official Website	3.54
e. Newspaper/magazine articles	2.43
f. Blog/Vlog	2.99
g. Social media	2.75
h. Celebrities/KOL	2.36
i. Advertising	2.07

Source: own processing

Question 30 focuses on how much the respondents trust the information from different channels. Each respondent evaluated the giving communication channels from 1 to 5 (1 is 'strongly disagree', 5 is 'Strongly agree'). The average marks are depicted in Table X, the higher score, the more reliable and useful channel. People mostly prefer to trust information about EVs from their families and friends, with the highest score of 4.42. A large number of respondents thought that their views on the brand are influenced by what they have seen online, regardless of whether the information is posted online by the brand or by others. The review site is marked 4.16 with the second place, the internet/website scored 3.79, and the Brand official website scored 3.54. Even though social media and celebrity / KOL content marketing have a strong influence, the interviewees are still skeptical, scoring 2.75 and 2.36.

In general, although online information affects consumers' perception and consideration of electric vehicle brands during the purchase process, the offline experience also plays an essential role in consumer decision-making.

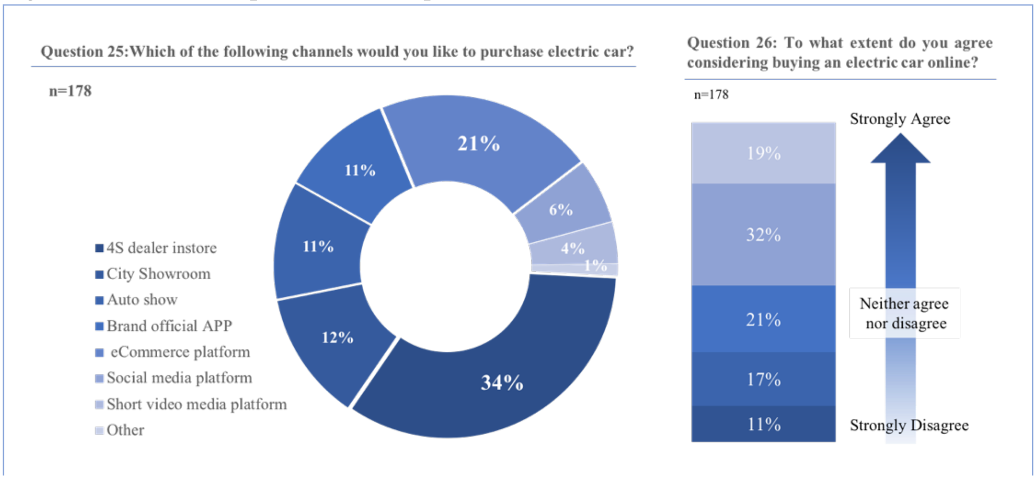
Figure 16: Result of question 22



Source: own processing

Out of all the respondents, 42% of people thought that the offline campaigns could directly deliver EVs information and experience. (Q19) According to the results of question 22 (Figure 16), the promotion campaign is the most effective marketing campaign to drive customers' purchase decisions, including offline promotion campaign 65% and online promotion 61%. The result of question 23 (Table 6) shows that those who think the offline experience could drive decision making when they consider buying an EV, which accounts for more than 58% of all respondents. Meanwhile, 51% of all respondents think that digital experience could be more convenient when buying an electric car and drive their decision making. (Question 24, Table 6) According to the results above, the author has reason to believe that customers from the first-tier city prefer to pay more attention to their own experience when buying EVs and are willing to accept the digital purchase process.

Figure 17: Result of question 25 to question 26



Source: own processing

Question 25 and question 26 focus on the channels the respondents choose to purchase EVs. Figure 17 illustrates that 57% of respondents would like to purchase electric cars in-store; 42 % of all respondents would like to purchase EVs online, including from brand official application, eCommerce platform, social media platform, and short video/ live streaming platform.

With the gradual development of the Internet and digitalization, consumers are seeking a quick, simple, and convenient way to buy a car to meet their personalized needs. They are gradually turning to collect information, comparing prices, and enjoying online car booking discounts through online shopping channels. With the development of various online and offline omnichannel marketing, consumers gradually accept the online way of buying cars. The result of question 26 shows that more than 72% of all respondents accept buying EVs online, including 51% of people are considering buying an EV online. Most NEV brands, such as NIO, Xpeng, and other independent brands, are mainly for online sales, creating personalized products for consumers, making online appointment or booking, and the offline door-to-door test drive and delivery. Thus, it can prove the transformation brought by strengthening digital and omnichannel marketing.

5.3 Discussion of marketing techniques improvement

It is recommended that new energy companies analyze consumers' touch points in each part of the purchase decision-making process and choose more effective marketing techniques to affect the entire consumer chain.

- **Brand-oriented, product-oriented marketing content: knowledge and opinions as the core content**

As new energy vehicles are new to most consumers, especially when facing new brands, consumers have more concerns about vehicle performance and ease of use. Moreover, new energy vehicles are more expensive than traditional vehicles, and there are greater challenges in the process from brand recognition to conversion purchase.

Consumers still have misunderstandings or unfamiliar understanding of NEV, so the focus is on the impact of the understanding stage, the most sensitive to reviews, the trust of NEV through word-of-mouth influence, and the support of consumer-oriented public relations to gain greater influence, to reduce waste of resources.

Compared with traditional car companies, new forces have various disadvantages such as brand and channel, but because they were born in the Internet era, they also have better Internet thinking and user thinking. They are start-up forces with obvious advantages and disadvantages, and they have infinite possibilities in the future. The new forces of car manufacturing should make a complete brand positioning and marketing layout from the brand establishment period and establish their own differentiated brand image.

- **Consumers are passionate about digital experience**

Digital channels are the channels that enable brands to achieve the widest coverage and the longest service time 7*24h. With the development of APP, short video, live broadcast and other catalyst habits, as well as the development of AR and VR immersive experience technology, the functions and roles of digital channels for new energy vehicle manufacturers will become more diversified, including virtual product experience, driving experience, Online vehicle inspection, remote after-sales service, etc., can all use digital channels to improve user experience. In addition to its own digital channels, third-party e-commerce platforms and O2O service platforms are also becoming important supplements to manufacturers' digital channel layout.

- **Take advantage of the virality of We-media to catch up with consumers' F-Fators**

  For Traditional OEMs, brand value requires long-term accumulation. However, the establishment of new car forces is relatively short, generally less than 5 years. If you want to gain a high degree of brand recognition, you must either invest heavily in building brand value in the short term or carry out long-term brand value precipitation. In the short term, unicorn companies can combine the characteristics of the increasingly younger target groups of new energy vehicles to adopt new marketing methods to increase brand awareness, such as using live broadcasts, short videos and other social media for publicity, and establishing offline pop-ups. Store invite KOLs to promote to the public and other methods.

- **Focus on all-link contacts for consumers to create an integrated omni-channel experience**

  Regardless of whether omnichannel retailing is online or offline, no matter how many forms there are, in the user-centered channel design, all existing channels must be coordinated and seamlessly connected to provide users with a coherent and continuous excellent experience. This requires new energy vehicle manufacturers to establish a “single user view” that integrates omni-channel touchpoints, bridging channel boundaries through data, and allowing users to customize their personalized experience in seamless omni-channels without hindrance. New energy vehicle manufacturers can achieve in-depth data connection, integration and analysis of all parties through strategic cooperation with Internet companies and service providers and explore more value-creating application scenarios.

  Online and offline seamless collaboration: Through the collaboration of multiple online channels and offline channels, such as official APP, e-commerce platforms, virtual experience centers, user communities, etc., attract traffic, cultivate, convert, and retain users. The channel coordination strategy centered on the main body of online and offline endpoints and users can greatly optimize operational efficiency while improving the experience of the whole life cycle.

- **"Experiential" marketing strategy**

Taking the consumer psychology, hobbies, and consumption level of users as the starting point of the strategy formulation, at the same time, it is necessary to add: this type of marketing method is more in line with the concerns of consumers in the new environment and new markets, especially for many people in their 20s to 30s. Widely favored by the younger generation. The enlightenment that this brings to other new energy automobile companies is consumers may not only look at the word "new energy", but consumers buy a means of transportation. In this regard, new energy vehicles are no different from ordinary cars. Therefore, there is really no need to highlight the label “new energy”. Consumers can't just pay for the "new energy". When marketing, they must "landing" the experience marketing strategy, so that consumers can obtain tangible experience and discounts, in order to attract customers in the long term.

From initially attracting user attention, to activating users to initiate interaction, to cultivating to become loyal fans, to users who are transformed into new energy vehicle products or services, and finally to become loyal users and supporters of the brand, the user's full life cycle journey is established. On top of the continuous interaction with the brand, of course these interactive experiences must be supported by omni-channel experience, product experience and service experience. For example, through leasing, the threshold for users to understand and try new energy vehicles can be lowered, so that more users can use new cars more quickly, experience various performance and intelligent functions of cars, and realize rental promotion and rapid occupation of the market. Gain first-mover advantage.

- **Increasing the linkage power of O2O**

Traditional OEMs and Emerging NEVs automakers should learn from each other's marketing methods.

Traditional OEMs: Because they have a certain foundation of brand power, they are mainly based on traditional media/mass media, relying on brand influence to make consumers trust, improve the marketing strategies and marketing methods of We media and online channels, and enhance the influence of word-of-mouth communication. Improving own APP service and pay attention to the effect of community communication and customer relationship management.

Emerging NEVs automakers: Pay attention to online marketing, use We media and word-of-mouth marketing to create topics. According to the survey, consumers not only believe in WOM, but also value offline experience. According to the maturity of the market, car companies can appropriately entrain offline media releases, choose effective channels that can cover the life trajectory of consumers, and increase exposure. Use offline channels to reach potential consumers as the gateway to process to online communication.

6 Conclusion

Based on the government's vigorous support for the development of new energy vehicles, China's NEVs market has risen rapidly, especially the explosive growth of new energy vehicle sales from 2015 to 2018, becoming the world's largest new energy vehicle market. However, in the long run, the future development of the new energy vehicle market cannot rely solely on fiscal incentive policies. The Chinese government has decided to implement a subsidy retreat policy. The understanding of ordinary consumers' willingness to purchase and purchase preferences helps to make the products more suitable to the actual needs of consumers.

As NEVs are gaining popularity in the Chinese market, and society is increasingly accepting to replace traditional ICEV with NEVs. Chinese consumers ’expectations of EVs are also constantly increasing to meet their rising driving needs. For potential consumers, brand recognition is the key, followed by industry leadership and technology maturity in the field of new energy vehicles. Advances in technology, changes in consumer lifestyles, marketing contacts are gradually developing from traditional media to new media, and marketing methods are becoming more and more diversified. Mobile marketing, social marketing and word-of-mouth marketing are gradually becoming trends and moving towards consumer buying journey, which impact their buying decision making.

As far as consumers are concerned, in the future, NEVs must not only meet the needs of vehicles as tools, but also connect to the Internet to facilitate life. Therefore, automobile plus Internet is the development direction. In the future, NEVs will be intelligent, connected and platformed. In marketing communication, the consumer as the core, emphasizing communication marketing and experience marketing.

In the era of widespread digital technology and wide used of the mobile Internet and new media technologies, due to their unique media attributes, have brought unlimited possibilities to the transformation and innovation of automotive brand marketing strategies and communication methods. With the development of information technology, Emerging NEVs automakers rely on mobile platforms to push and disseminate brand information, which gives audiences a whole new way of acquiring information. On the other hand, Emerging NEVs automakers focus on community communication more than Traditional OEMs.

Traditional OEMs are also changing from single traditional marketing to mobile internet We Media marketing, from single brand promotion to the development of the entire brand industry chain.

This thesis analyzes the macro and microenvironment of the new energy vehicle market in China, and then conducts a consumer survey on the new energy vehicle market. According to the survey results and the purchasing path of consumers of new energy vehicles, effective marketing strategies are put forward. The research found that the consumers who have purchased cars are mainly 80s and 90s users, which are highly price-sensitive and like to experience new high-performance cars and pay for it, while potential buyers are interested in new energy vehicle products but have misunderstandings about performance and price and are still considering.

If car companies want to attract consumers to purchase, in addition to adopting effective and targeted marketing methods to deepen consumers' brand recognition, it also needs to be rooted in the product itself. Of course, consumers believe that technological advances ensure safety, and car companies need to make safe, high-quality products. In short, electric vehicles should not only meet their driving needs, but also help to protect the environment. Electric vehicles should have advanced technologies and models, so as to completely change the significance of future driving to society. The most important thing is that electric vehicles should allow users to enjoy a better life.

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8 Appendix

8.1 Questionnaire survey

Dear Respondent,
I am a master student of Business Administration of the Czech University of Life Sciences in Prague and I am currently working on my diploma thesis "Marketing techniques for Electric Car". I would be very grateful if you would take about 15 minutes of your time to complete this questionnaire. This will help me to analyze the marketing techniques in relation to electric car and customer behaviors in China. The results will be included in the practical part of my thesis.
Unless indicated otherwise, tick only one answer per question

A. <u>Demographics</u>

1. Please select the range that includes your age.

a. 18 – 24【14%】
b. 25 – 35【48%】
c. 36 – 45【21%】
d. 46 – 55【13%】
e. 56+【4%】

2. **What is your gender?**

a. Male【57%】
b. Female【43%】

3. Which of the following best describes your highest achieved education level?

a. Junior high school or below【5%】
b. High School Graduate/Technical Secondary School【10%】
c. Associate degree【15%】
d. Bachelor's degree【45%】
e. Master's Degree【22%】
f. Ph.D.【3%】

4. What is your current occupation?

a. An ordinary employee of an enterprise (company)【20%】
b. Professional and technical personnel【10%】
c. Public institution staff【13%】
d. Enterprise (company) manager【9%】
e. Cadres/civil servants of state organs【19%】
f. Freelancer【10%】
g. The private owner【8%】
h. Housewife【5%】
i. Students【4%】
j. Other【2%】

5. **What is the average yearly income of your household?**
   a. Less than ¥50,000【5%】
   b. ¥50,000 - ¥99,999【7%】
   c. ¥100,000 - ¥149,999【12%】
   d. ¥150,000 - ¥199,999【21%】
   e. ¥200,000 - ¥249,999【29%】
   f. Greater than ¥250,000【26%】

6. **What is your family status?**
   a. Married with children【34%】
   b. Married without children【40%】
   c. Unmarried【23%】
   d. Other【3%】

B. <u>Vehicle Acquisition</u>

7. How many vehicles are owned in your household?
   a. 0【25.8%】
   b. 1【41.6%】
   c. 2【29.8%】
   d. 3 or more【2.8%】

8. **What kind of vehicles do you currently have available primarily for your use?【Multiple choice】** Note: Other's category includes ethanol, HEV, CNG, and hydrogen fuel cell.
   a. ICE【67.4%】
   b. PHEV【27.0%】
   c. BEV【12.9%】
   d. Others【2.2%】

9. What are the main uses of your car?
   a. Personal daily work and travel in the city【97%】
   b. Personal intercity travel【31%】
   c. Multi-person (family, friends) travel in the city【80%】
   d. Multi-person (family, friends) intercity travel【54%】

10. **How many times did you buy the EVs?**
   a. First-time buyers【17.4%】
   b. Non-first-time, additional 【16.3%】
   c. Non-first-time, replacement【1.1%】
   d. None【65.2%】

11. **What type of vehicle are you considering when most recent purchase?**
   a. ICE 【31.5%】
   b. PHEV 【43.8%】

c. BEV 【23.0%】
d. Others 【1.7%】

12. What is your intention to buy a BEV in the nearly future?

a. I am willing to buy【43.2%】
b. I will consider buying【38.8%】
c. I don't want to buys【18.0%】
Note：if you chose C, please skip to 'Question 15'

13. **Which types of BEVs brand do you consider?**

a. Traditional foreign (or Sino-foreign joint venture) brand【71.2%】
b. Traditional domestic brand【87.0%】
c. Emerging startup brand【38.4%】

14. **What is the main reason/advantages you are considering a BEV?【Multiple choice】**

a. Lower vehicle operating costs【86%】
b. Easy access to license plates【92%】
c. No restrict car use【73%】
d. Keeping up with latest technology【57%】
e. Good parameter and performance【33%】
f. Government subsidies 【64%】
g. Rebates/tax incentives【67%】
h. Environment Friendly, lower emissions【79%】
i. Trendy and good look【38%】

15. **Which of the following reasons keep you from buying a BEV?【Multiple choice】**

a. Insufficient driving range【91%】
b. Inconvenient charging【75%】
c. Short battery life【72%】
d. Too long to charge【50%】
e. Low residual value【28%】
f. Imperfect after-sales service【47%】
g. Higher price【38%】
h. Immature technology【81%】
i. Concern over vehicle quality/ safety【84%】

16. What do you think should be the most considering when buying EVs? (Please choose the five most important factors from the following options)

a. Exterior look 【38%】
b. Comfort【34%】
c. Power configuration【61%】
d. Intelligent and Connected【43%】
e. Driving range【83%】

f. Charging system【63%】
g. Brand image【22%】
h. Safety【70%】
i. Cost of daily use【14%】
j. After-sales experience【8%】
k. Battery quality and life【57%】
l. Price【7%】

17. To what extent do you accept the autonomous and connected technologies and willingness to pay for them?

a. Strongly disagree【8%】
b. Somewhat disagree【14%】
c. Neither agree nor disagree【18%】
d. Somewhat agree【32%】
e. Strongly agree【28%】

18. To what extent do you agree the customized vehicle service is necessary when buying EVs?

a. Strongly disagree【6%】
b. Somewhat disagree【12%】
c. Neither agree nor disagree【38%】
d. Somewhat agree【26%】
e. Strongly agree【18%】

C. <u>Consumer behavior and attitude towards marketing techniques</u>

19. **From what channels can you get the information about the electric vehicles?【Multiple choice】**

a. Auto vertical websites and mobile APPs【84%】
b. Official website/mobile APPs of automakers【43%】
c. Social media APPs【76%】
d. Video website and APPs【49%】
e. Short video platform【45%】
f. Video game implantation【35%】
g. eCommerce website and APPs【34%】
h. Searching engine and APPs【63%】
i. TV/ Radio【15%】
j. 4S dealer stores / City showroom【34%】
k. Family, friends or workmates【54%】
l. Offline campaign【42%】
m. Auto show【36%】
n. Transport advertising【29%】
o. Outdoor advertisement (OOH)【25%】
p. Inner-building advertisement【38%】
q. Newspaper/magazine【10%】

20. To what extent do you agree the <u>social media marketing</u> could influence the decision making when consider buying an electric car? Note: Social media includes Weibo, WeChat, QQ, Facebook, Instagram, Momo, Zhihu, etc.

a. Strongly disagree【9%】
b. Somewhat disagree 【18%】
c. Neither agree nor disagree【24%】
d. Somewhat agree【27%】
e. Strongly agree【22%】

21. To what extent do you agree <u>the short video platform and live streaming platform campaign</u> could influence your purchase process and decision when consider buying an electric car? Note: Short video platform/live platform includes Douyin, Kuaishou, Taobao Live, Hupu, etc.

a. Strongly disagree【12%】
b. Somewhat disagree 【19%】
c. Neither agree nor disagree【29%】
d. Somewhat agree【24%】
e. Strongly agree【16%】

22. Which of the following marketing campaigns can drive your purchase decision when you attended?【Multiple choice】

a. In store promotion campaign【65%】
b. Auto exhibition【49%】
c. Experiential driving【56%】
d. Road trip campaign【32%】
e. Pop-up auto show campaign【22%】
f. New car launch conference【15%】
g. Online promotion【61%】

23. To what extent do you agree the <u>offline experience</u> could drive the decision making when consider buying an electric car?

a. Strongly disagree【6%】
b. Somewhat disagree 【14%】
c. Neither agree nor disagree【22%】
d. Somewhat agree【31%】
e. Strongly agree【27%】

24. To what extent do you agree the <u>digital experience</u> could be more convenient and influence the decision making when considering buying an electric car?

a. Strongly disagree【10%】
b. Somewhat disagree 【14%】
c. Neither agree nor disagree【21%】
d. Somewhat agree【34%】
e. Strongly agree【21%】

25. Which of the following channels would you like to purchase electric car?

a. 4S dealerships【34%】
b. City Showroom【12%】
c. Auto show【11%】
d. Brand official APP【11%】
e. eCommerce platform【21%】
f. Social media platform【6%】
g. Short video media platform【4%】
h. Other【1%】

26. To what extent do you agree considering buying an electric car online?

a. Strongly disagree【11%】
b. Somewhat disagree 【17%】
c. Neither agree nor disagree【21%】
d. Somewhat agree【32%】
e. Strongly agree【19%】

27. Which of the following applications do you usually use? 【Multiple choice】

a. Social【95%】
b. Music & Audio【82%】
c. Map & navigation【74%】
d. Video【78%】
e. eCommerce【73%】
f. Taxi-hailing【71%】
g. Lifestyle【69%】
h. Short video【54%】
i. Games【45%】
j. Education【38%】
k. Finance【37%】
l. News and information【33%】
m. Automobile【24%】

28. **To what extent do you agree <u>the advertisements from applications</u> could attract you and you don't ignore/subscribe to skip?**

a. Strongly agree 【9%】
b. Somewhat agree【19%】
c. Neither agree nor disagree【23%】
d. Somewhat disagree 【31%】
e. Strongly disagree【18%】

29. To what extent do you agree that you would like to share your car purchasing experience and driving experience, and recommend a good car brand to others?

a. Strongly disagree【2.8%】
b. Somewhat disagree 【10.7%】
c. Neither agree nor disagree【14.6%】

d. Somewhat agree【42.1%】
e. Strongly agree【29.8%】

30. To what extent do you agree that the information in the following marketing communication channels is reliable and can provide you with good suggestions for the process of buying EVs？ (Strongly agree: 5 points; Strongly disagree: 1 points)

选项	Strongly agree	Somewhat Agree	Normal	Somewhat disagree	Strongly disagree	Average score
a. Friends and family	□ 5	□ 4	□ 3	□ 2	□ 1	**4.32**
b. Review site	□ 5	□ 4	□ 3	□ 2	□ 1	**4.16**
c. Internet/Website	□ 5	□ 4	□ 3	□ 2	□ 1	**3.79**
d. Brand official Website	□ 5	□ 4	□ 3	□ 2	□ 1	**3.54**
e.Newspaper/magazine articles	□ 5	□ 4	□ 3	□ 2	□ 1	**2.43**
f. Blog/Video Blog	□ 5	□ 4	□ 3	□ 2	□ 1	**2.99**
g. Social media	□ 5	□ 4	□ 3	□ 2	□ 1	**2.75**
h. Celebrities/KOL	□ 5	□ 4	□ 3	□ 2	□ 1	**2.36**
i. Advertising	□ 5	□ 4	□ 3	□ 2	□ 1	**2.07**

8.2 Qualitative interview with consumers (original Chinese version and related translation)

8.2.1 interview 1：

Q1. Which NEVs brand do you intend to buy/have purchased, belongs to traditional OEMs or new entrant automakers brand?
A: Domestic traditional OEMs, for example, BYD.

Q2. Would you like to recommend others to buy NEVs and share with them on social media platforms (WeChat, Weibo, Douyin, etc.)?
A: Yes, I usually use WeChat more because it is convenient. If I see a public account tweet about a brand and model I am interested in, I will forward it to my friends or family members and ask their opinions.

Q3. During the pandemic, from which channels did you obtain information about NEVs? How do you think this information and channels have a significant influence on your purchase decision?
A: I mainly get information from automobile vertical websites, Douyin and Wechat. The channel that has the most significant influence on my purchase decision is definitely the automobile vertical website because there are many professional car critics and official test data on it.

Q4. What do you think if traditional OEMs NEVs brands use emerging marketing methods (WeChat, Douyin Live, Taobao/Tmall, etc.)?

A: In the past two years, the marketing of Traditional OEMs has become more and more innovative. There are many WeChat video accounts, and Douyin live streaming, which is convenient for me to know more about the performance of car models and car purchase discounts on my mobile phone. Therefore, it is very good for Traditional OEMs to adopt emerging marketing techniques, making the car purchasing experience easier and more convenient.

Q5. Do you think traditional advertisings (TV advertising, magazine advertising, outdoor advertising) are effective for traditional OEMs NEVs brands?
A: It is very effective. I started to pay attention to BYD's NEVs only because I often saw its advertising on TV and outdoor ads.

Q6. What do you think of the official mobile application of traditional OEMs brands and their user community marketing?
A: I think the official mobile applications of traditional OEMs are so-so, similar to the official website, mainly focusing on introducing auto products and services. Because traditional OEMs have many car models, most of them are gasoline cars, and they have little investment in the community marketing of NEVs. Although gradually learning from new entrant automakers NEVs brands, I think most of them are sales promotion of 4S stores, which cannot reach the communication function of natural user communities.

Q7. Do you think it is still necessary to have an "offline experience" (visiting the car in-store or test-driving) before buying a car during the pandemic? Why？
A: I think it is still necessary. I can experience the performance and comfort of the car when I’m taking the driving test. If I haven't test-driving, touched it, or consulted in person with a 4s store, it would be difficult for me to buy a car. Regularly, I will go directly to the store for face-to-face consultation and test driving, but I made an appointment for a test drive through the official website during the pandemic.

Q8. The offline marketing activities of NEVs brands are more oriented to users' life. Which offline marketing activities of brands have you participated in? Which activities influence your car purchase decision more？
A: I have participated in BYD’s test drive and in-store appreciation activities, and I can really experience the model's performance and the preferential activities that can affect my car purchase decision.

Original Chinese ver.
问题一：请问您意向/已购的新能源汽车属于传统车企还是新势力品牌？具体是什么品牌？
匿名受访者：传统车企，比亚迪

问题二：请问您是否愿意推荐其他人购买新能源汽车，并通过社交平台（微信、微博、抖音等）分享给他人吗？
匿名受访者：愿意，我一般用微信比较多，因为方便，如果看到公众号推文有关于自己有兴趣的品牌和车型，会转发给朋友或家人，问问他们的意见。

问题三：请问在疫情期间，您从那些渠道获取意向新能源汽车信息？这些信息和渠道对您的购买决策影响力大吗？
匿名受访者：主要通过汽车垂直媒体还有抖音、微信了解信息，对我购买决策影响最大的渠道肯定是汽车垂直媒体，因为上面有很多专业车评人以及官方的测试数据。

问题四：您对传统车企新能源汽车品牌采用新兴的营销方式（如微信、抖音直播、淘宝/天猫商城）有什么看法？
匿名受访者：这两年传统车企的营销也越来越新颖了，很多微信视频号的传播，还有抖音直播也非常多，方便我在手机上就能了解车型的性能和购车优惠，所以传统车企采用新兴营销方式的做法非常好，让购车体验更轻松便捷。

问题五：您认为传统广告营销方式（电视广告、杂志广告、户外广告）对传统车企新能源汽车品牌是否有效？
匿名受访者：我认为还是很有必要的。试驾能够体验车的性能和舒适感。如果没有试驾过、没摸过、没当面和 4s 店进行咨询了解，我很难下决心买车。正常来说我会直接到店咨询和试驾，但在疫情期间，我是通过官网预约试驾的。

问题六：您对传统车企新能源汽车品牌自主 APP 以及用户社区营销对有什么看法？
匿名受访者：这两年传统车企的移动软件做得一般般，和官网差不多，主要还是汽车产品和服务介绍。因为主机厂的车型很多，大部分为汽油车，对新能源汽车的社区营销投入不大。虽然逐渐借鉴新势力品牌，我觉得里面大部分都是 4s 店的销售在宣传，还达不到真正的用户社区的传播功能。

问题七：在疫情期间，您认为购车前"线下体验"（到店看车或试驾）是否还有必要，为什么？(通过什么渠道预约试驾？)
匿名受访者：我认为还是很有必要的。试驾能够体验车的性能和舒适感。如果没有试驾过、没摸过、没当面和 4s 店进行咨询了解，我很难下决心买车。正常来说我会直接到店咨询和试驾，但在疫情期间，我是通过官网预约试驾的。

问题八：新能源汽车品牌的线下活动更偏向用户生活，请问您参加过新能源品牌什么线下活动？哪些线下活动更能影响您的购车决策？
匿名受访者：我参加过比亚迪的试乘试驾、还有门店品鉴会活动，真正能体验车型性能以及有优惠的活动更能影响我的购车决策

8.2.2 Interview 2: Q&A with NIO consumer

Q1. Which NEVs brand do you intend to buy/have purchased, belongs to traditional OEMs or new entrant automakers brand?
A: new entrant automakers brand, NIO

Q2. Would you like to recommend others to buy NEVs and share with them on social media platforms (WeChat, Weibo, Douyin, etc.)?
A: Yes, I mainly use social platforms such as WeChat and NIOApp. In addition to social platforms, I also recommend face-to-face with relatives and friends。

Q3. During the pandemic, from which channels did you obtain information about NEVs? How do you think this information and channels have a significant influence on your purchase decision?
A: I mainly look at Douyin and WeChat video accounts to obtain more information about NEVs. Because there are many influencers' evaluations and expert recommendations, they greatly influence my final decision to buy a car.

Q4. What do you think if new entrant automakers NEVs brands use emerging marketing methods (WeChat, Douyin Live, Taobao/Tmall, etc.)?
A: There are many marketing techniques for new entrant automakers NEVs brands. They often release many innovative car videos through the Wechat Video account and invite KOL to live streaming on the Douyin platform. There are also many discounts for activities at the flagship store of Tmall on “Double Eleventh Day”. I think the marketing of new entrant automakers is much better than that of traditional OEMs. There are many marketing channels and new forms, and they are also absorbing.

Q5. Do you think traditional advertisings (TV advertising, magazine advertising, outdoor advertising) are effective for new entrant automakers NEVs brands?
A: I think the effect is still some. After all, more publicity can have more people know the brand.

Q6. What do you think of the official mobile application of new entrant automakers NEVs brands and their user community marketing?
A: The official mobile application and user community marketing are made very well. For our car owners, NIOApp is used more frequently than the official website, and it often publishes Fans club activities and points exchange activities, which makes us very willing to use NIOApp to gain the activity information and news. The user community is also efficient, and our car owners and friends are very willing to post their experiences and chat together.

Q7. Do you think it is still necessary to have an "offline experience" (visiting the car in-store or test-driving) before buying a car during the pandemic? Why？
A: It is necessary. No matter how many KOLs and experts recommend, I still have to experience it myself before I decide to buy a car. I made an appointment for a test drive directly through the NIOApp. During the pandemic, NIO launched the Door-to-door test drive service very intimately, sign up through the NIOApp platform, and the store will send the car to us directly, which is very convenient.

Q8. The offline marketing activities of NEVs brands are more oriented to users' life. Which offline marketing activities of brands have you participated in? Which activities influence your car purchase decision more？
A: I often participate in NIO Car Fans club activities, which are themed with tycoon salons or life sharing. I think that marketing campaigns close to users and interesting offline activities can influence my car purchase decision more. Because buying a car depends not only on the vehicle's performance but also represents a lifestyle.

Original Chinese ver.
问题一：请问您意向/已购的新能源汽车属于传统车企还是新势力品牌？具体是什么品牌？
匿名受访者：新势力品牌，蔚来

问题二：请问您是否愿意推荐其他人购买新能源汽车，并通过社交平台（微信、微博、抖音等）分享给他人吗？

匿名受访者：愿意，社交平台主要通过微信和蔚来app，除了社交平台我也会当面和亲戚朋友推荐

问题三：请问在疫情期间，您从那些渠道获取意向新能源汽车信息？这些信息和渠道对您的购买决策影响力大吗？
匿名受访者：主要看抖音和微信视频号了解新能源汽车的信息，因为上面有很多大 V 的测评和专家推荐，所以对于我最终买车的决策有很大影响

问题四：您对新势力新能源汽车品牌采用新兴的营销方式（如微信、抖音直播、淘宝/天猫商城）有什么看法？
匿名受访者：新势力品牌的营销方式很多，经常通过微信视频号发布很多创意用车视频，在抖音平台也经常请 KOL 一起直播，到了双十一天猫商城旗舰店的活动优惠也非常多。我觉得新势力品牌的营销比传统车企好太多，营销渠道多且形式新，而且还非常有趣。

问题五：您认为传统广告营销方式（电视广告、杂志广告、户外广告）对新势力新能源汽车品牌是否有效？
匿名受访者：我觉得效果还是有的，毕竟宣传多了才能有更多人认识新势力品牌。

问题六：您对新势力新能源汽车品牌自主 APP 以及用户社区营销对有什么看法？
匿名受访者：新势力品牌的 APP 和用户社区营销都做的非常好，对于我们车主来说，APP 比官网的使用频率更多，而且上面经常发布车友活动和积分兑换活动，让我们非常愿意在 APP 上了解品牌咨询。用户社区也非常实用，我们的车主朋友都非常愿意在上面发布自己的用车心得和一起聊天。

问题七：在疫情期间，您认为购车前“线下体验“（到店看车或试驾）是否还有必要，为什么？(通过什么渠道预约试驾？)
匿名受访者：：非常有必要，就算再多的 KOL 和专家推荐，也还是要自己亲自体验过才能决定买车，我是直接通过蔚来 APP 进行预约试驾的，因为疫情期间，蔚来非常贴心的推出了上门试驾服务，通过自主 APP 平台报名，门店直接送车上门，非常方便。

问题八：新能源汽车品牌的线下活动更偏向用户生活，请问您参加过新能源什么样的线下活动？什么样的线下活动更能影响您的购车决策？
匿名受访者：我经常参加蔚来的车友会活动，很多都是大咖沙龙或者生活分享主题的活动。我觉得贴近用户和有趣的线下活动更能影响我的购车决策。因为买车除了看车辆性能，更多的是代表一种生活方。