TITLE: *Automotive Dealers at a Crossroad: Exploring the Forces Behind the Dealers' Mandatory Business Model Innovation*[1]

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Abstract

Purpose: This study explores the forces reshaping the business models of automotive dealers. As key players in the Western economy, dealers are currently facing significant disruption due to shifts in the automotive landscape. The study aims to identify these forces and examine how they compel dealers to innovate their business models.

Design/methodology/approach: Adopting a qualitative case study approach, the research focuses on a medium-sized automotive dealership located in central Italy. Data collection involves participant observation, semi-structured interviews, and secondary sources, including industry reports and internal company data.

Findings: The study identifies and analyses the main challenges impacting the traditional dealership business model, outlining possible trajectories for business model innovation in response to these pressures.

Originality/value: Despite their economic significance, automotive dealers remain underrepresented in the literature on business model innovation. This study is among the first to examine dealership-specific innovation processes, offering a structured view of the external pressures faced and potential pathways for business model transformation.

Keyword: business model innovation; automotive dealer; challenges; strategic challenges; strategy

1. INTRODUCTION

European car dealers are facing unique challenges that, following the Covid-19 outbreak (Euronews, 2025), are jeopardising their survival (Illés et al., 2021; Pizzichini et al., 2025). The European automotive industry has a century and a half of history and is now on the verge of an unprecedented consolidation process. The study focuses on automotive dealers, usually incumbent SMEs that are directly related to car brands (Koroth et al., 2019). Once strongly supported by major car brands, these now find themselves at a crossroads, compelled to rethink and innovate their business model (BM). The study seeks to identify and systematise the types and categories of challenges threatening the survival of car dealers, highlighting the need for transformation. It argues that multiple forces are pressuring dealers to adapt if they are to endure, pushing them to move beyond their traditional role as mere touchpoints in the brands' distribution networks (Pizzichini et al., 2025). The study addresses two theoretical gaps. First, research on automotive strategy has focused mainly on supply chains, digital marketing, and post-sales operations (Golara et al., 2021; Illés et al., 2021), overlooking the specific role of dealers. Second, the Business Model Innovation (BMI) literature has prioritised brands and OEMs (Van Riel et al., 2011; Pizzichini et al., 2025), neglecting how dealers themselves engage in innovation. The omission is notable in Italy, where over 1,800 dealerships generate sales exceeding 1 million vehicles and €45 billion annually (IlSole24Ore, 2024). Despite their importance in value creation and customer interaction, dealers remain underexplored in academic research. By adopting the dealer's perspective, this study highlights the forces driving mandatory BMI and provides new insights for both scholars and practitioners. The study addresses this research question: *"How are automotive dealers responding to emerging challenges by innovating their business model?"*. The study adopts a qualitative exploratory approach (Yin, 2018) through a single case study of a medium-sized dealer in central Italy. Findings outline the challenges threatening the traditional business of automotive dealers and suggest potential pathways for innovation in business models. The study highlights business model innovation trajectories by considering the case firm's experience and outlining the outcome of the identified forces.

2. LITERATURE BACKGROUND
2.1 Automotive dealers' business model innovation

BM and BMI are central to understanding how firms respond to technological, societal, and business transformations (Ziegler & Abdelkafi, 2023). In the automotive sector, BMI is crucial as it enables dealers to introduce electric vehicles, integrate innovative solutions, anticipate trends, and shift from product- to service-oriented models (Pizzichini et al., 2025). Despite the industry undergoing its most profound transformation in over 140 years (Llopis-Albert et al., 2021), BMI research has largely overlooked automotive dealers (Pizzichini et al., 2025). Traditionally, their revenues derive from margins on new and used car sales, car brand bonuses, and service commissions, with dealers purchasing vehicles and reselling them at a recommended margin (Kovalova & Vartiak, 2024). Most existing studies focus on car brands, supply chains, and innovation policy (Genzlinger et al., 2020; Megyeri et al., 2023; Mishra et al., 2023; Rachgyinger & Müller, 2024; Resta et al., 2017; Athanasopoulou et al., 2019; Liu et al., 2023; Salvini et al., 2024). Others explore technological and business model transitions (Ziegler & Abdelkafi, 2023), digital servitisation (Pizzichini et al., 2025; Kessler & Stephan, 2013; Sliz, 2021), EV-related business models (Niewenhuis, 2018; Kovalova & Vartiak, 2024; Proff et al., 2019), the role of dealers as mobility providers (Vom Berg et al., 2017), and sustainable BM frameworks (Ludeke-Freund et al., 2019; Bocken et al., 2014). Yet, to date, only Kovalova and Vartiak (2024) have addressed the shift from dealership to agency models, which, while more flexible, reduce dealer margins and reshape distribution and economics.

2.2 Automotive dealers' strategy management challenges
Automotive dealers usually operate under exclusive agreements with car brands to sell and service branded vehicles within defined territories (Biondi et al., 2013). They act as distribution intermediaries, offering vehicles, financial services, spare parts, and other value-added services (Kovalova & Vartiak, 2024). Dealers must comply with brand standards, and service quality directly affects sales, customer retention, and brand reputation (Golara et al., 2021). While bonuses reward compliance with brand requirements, dealers traditionally retain limited strategic autonomy (Van Riel et al., 2011; Kovalova & Vartiak, 2024). Research on automotive industry strategies has explored the role and characteristics of dealers (Pavlinek, 2025), customer journeys and preferences (Bacher & Manowicz, 2020; Kovacs & Wolf, 2024; Al-Abdallah et al., 2021; Rodrigues et al., 2023; Dehdashti et al., 2018; Whitaker et al., 2024), the impact of digital servitisation (Winkelhake, 2024; Salvetat & Lacam, 2020). Other studies have examined brands' direct-to-consumer strategies (Fraser et al., 2013; Hoeft, 2021), post-sale service (Golara et al., 2021), the ecological transition (Cabigiosu & Lanzini, 2023; Deuten et al., 2020; Kayikci et al., 2021; Demartini et al., 2023; Moita et al., 2023; Proff et al., 2015; Latino et al., 2025; Ferraro & Garofalo, 2025; Lorne & Purmehdi, 2025), and the need for capability development (Loder et al., 2023; Dodd et al., 2024; Van Riel et al., 2011; Candelo et al., 2022; Koroth et al., 2019; Braidy et al., 2025). Additional themes include the effects of crises and disruptive events (Dragos-Mariam, 2024; Illés et al., 2021; Uray et al., 2024), customer loyalty and satisfaction (Holmes et al., 2020; Hashem et al., 2024), and dealer–brand relationships (Anisimova & Mavondo, 2014; Golara et al., 2021; Ebrahimi et al., 2023). Broader industry shifts include electric, autonomous, and connected vehicles, the rise of servitisation and mobility services (Pizzichini et al., 2025; Ziegler & Abdelkafi, 2023; Teece, 2018), service mix innovation (Athanasopoulou et al., 2019), the sustainable transition (Wells, 2013), regulation (Yun et al., 2020), and evolving customer behaviour (Moons & Pelsmacker, 2015). Yet, a systematic strategic-level view of these challenges is lacking, as changes in dealers' BMs remain underexplored.

3. METHODOLOGY

This study employs an exploratory qualitative case study design (Yin, 2018), which is well-suited for investigating complex phenomena with limited existing theory. The approach allows in-depth analysis of how automotive dealers are reshaping their BMs, focusing on contextual forces, strategic responses, and the dynamic process of BMI. Italy is Europe's fourth-largest car market, with over 1,800 dealerships and annual revenues above €45 billion (IlSole24Ore, 2024). Since 2020, the sector has faced sharp turbulence: registrations dropped 27.8% to 1.38 million, with sales collapsing over 85% during lockdowns (Cassa Depositi e Prestiti, 2020). Despite partial recovery (1.46 million units in 2021; 1.57 million in 2023), volumes remain below pre-pandemic levels (Focus2Move, 2021, 2024). Added pressures stem from competition and the transition to electrification (Camera dei Deputati, 2022). These challenges highlight both the sector's economic relevance and the suitability of this context for the research. The study focuses on Alpha, a medium-sized, family-owned dealership in central Italy, chosen for its revelatory potential (Eisenhardt & Graebner, 2007). After losing distribution rights to a major brand it had represented for over fifty years, Alpha was forced to reconfigure its strategic orientation and BM. With more than six decades of activity, Alpha offers valuable insights into how disruptions reshape long-established BMs. Data were collected through semi-structured interviews, participant observation, and secondary sources, including Alpha's communication channels, internal documents, and industry reports, which enabled triangulation (Yin, 2018). Analysis followed an abductive thematic approach (Timmermans & Tavory, 2012; Thompson, 2022). The analysis shed light on 17 challenges, later condensed into 5 categories (see Table 1). These were examined using the Business Model Canvas (Osterwalder & Pigneur, 2010).

4. ANALYSIS OF THE FINDINGS

Through abductive analysis of different data sources, the study identifies five categories of challenges currently affecting automotive dealers (Table 1). Brand-related challenges concern the growing emphasis on financial performance, the diffusion of flexible ownership models such as subscriptions, and the shift from franchise to agency or direct-to-consumer systems. Market-related issues include consolidation among European retail groups, the decline of traditional brands, the arrival of new entrants—particularly Chinese BEV makers—together with price competition, anti-subsidy measures, servitisation, and the volatility of used-car prices and residual values. On the customer side, dealers face affordability pressures due to tighter credit, the rise of digital and omnichannel purchasing journeys after COVID, and broader lifestyle changes. Policymakers also play a central role, with challenges linked to charging infrastructure, data access under the EU Data Act, and policy-driven electrification such as EU AFIR and the UK ZEV mandate. Finally, technology brings further disruption through software-defined vehicles, over-the-air updates, ongoing digital transformation, and the uncertain trajectory of future automotive innovation.

Table 1 – Categories and typologies of challenges characterising automotive dealers BMI

Categories	Emerging typologies	Impact on business model	Business model innovation in response
Brand-related challenges	Finance over car production	Car brands increasingly push financial promotion to sell the collateral financial plan and place less attention to the product itself, which, in a way, is losing relevance.	Change in value proposition, aligning resources and activities. Revenue streams improved in a way, even though financial plans create an imbalance according to the "old" economic structure of the dealer.
	Flexible ownership models (subscriptions, short-term) and fleet-mix shifts	Consumers and fleets access-over-ownership, raising utilisation and remarketing complexity; dealers must manage lifecycle risk (especially BEV RVs) and new fulfilment operations.	Launch or partner for subscription offers; configure pricing to residuals and utilisation; industrialise de-fleet/refurb flows; embed telematics to control wear and capture upsell.
	Transition from franchise to agency/direct-to-consumer (D2C) models	Margin compression (commission instead of gross margin), centralised pricing, redistribution of customer ownership and data to the OEM; working-capital relief from reduced new-car inventory.	Rebalance the Profit &Loss toward used-vehicle, finance-and-insurance (F&I), and aftersales profit pools; invest in omnichannel lead-conversion and customer-lifecycle management; specialise in remarketing and subscription channels that remain dealer-led.
Car market-related	Consolidation and scale effects in European retail groups	Larger groups capture data/network economies, negotiate stronger OEM terms, and professionalise remarketing; sub-scale independents face higher cost-to-serve and succession risk.	Mergers, acquisitions or alliances for scale; centralised shared services and marketing tech; specialisation (premium, utility vans, or BEV-focused used retail); capital-light partnerships for the agency world.

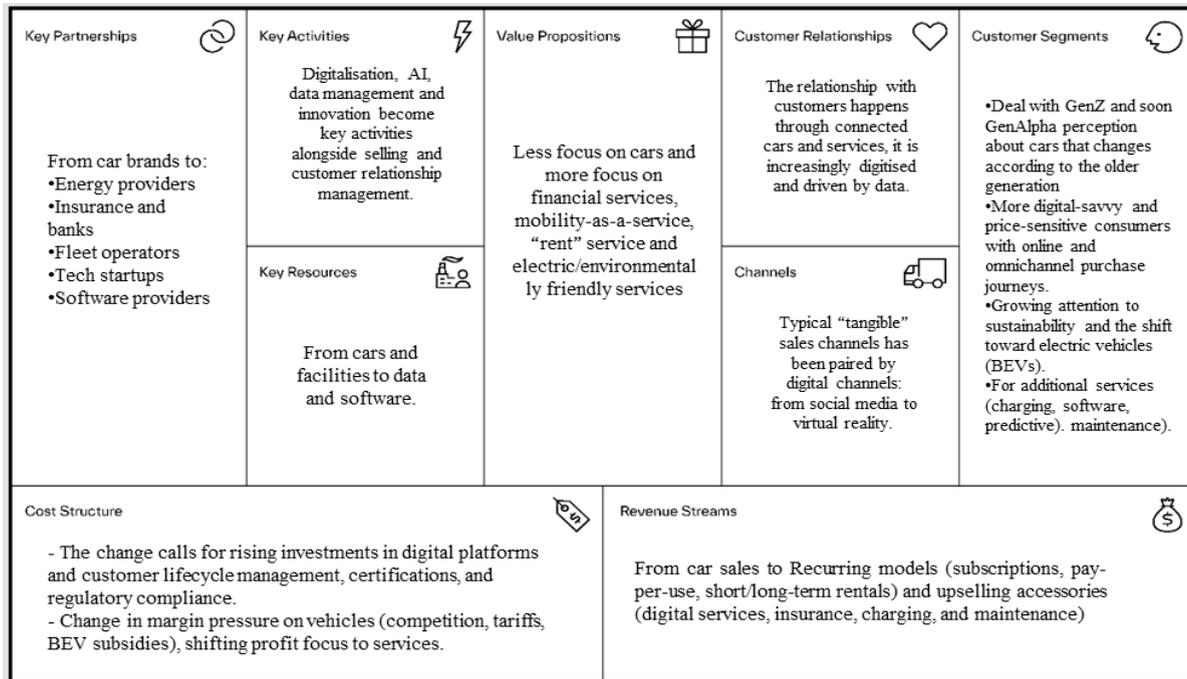| challenges	Crisis of traditional brands	Traditional key partners and value proposition key items are losing traction with both business customers and consumers, as well as against new brands from established and emerging markets.	Changes in how key partners are considered and their impact on the value proposition and overall competitiveness.
	New entrants, price competition, and EU trade defence (Chinese BEVs; EU anti-subsidy duties)	Price pressure on customers; potential supply disruptions and mix shifts; tariff pass-through affects affordability and brand strategy at retail.	Portfolio diversification (multi-brand including newcomers); localised sourcing and accessories; dynamic pricing and margin-mix management; education on tariff impacts.
	Servitisation	Shift from product to service sales.	Change in value proposition impact on revenue streams, while margins might rise, the overall turnover shrinks, calling the dealer to rethink cost structure and resource allocation.
	Used-car price volatility and residual-value (RV) pressure (especially for BEVs)	Swinging RVs impair leasing economics, increase floorplan risk, and complicate buy-back and guaranteed-future-value programs; consumer hesitation on used BEVs slows stock turns.	Dynamic pricing and data-science remarketing; battery-health certificates; risk-sharing with captives; stock mix tilting to high-liquidity models; in-house refurbishment to protect gross and days-to-sell.
Customer /Consumers-related challenges	Affordability squeeze and financing headwinds (euro-area credit conditions)	Higher borrowing costs and standards depress demand and push consumers to used cars, smaller segments, or longer terms; F&I income becomes more volatile as approval rates shift.	Broaden lender panels; create income-based pre-qualification flows; design value-engineered trims and accessories bundles; expand certified-pre-owned with transparent reconditioning.
	Digital, omnichannel consumer journey (post-COVID)	Buyers expect seamless online-to-offline continuity; the cost of customer acquisition rises if data and processes are fragmented; dealers risk losing high-intent traffic to OEM sites or marketplaces.	"Single view of the guest" stack; remote finance and insurance; digitised trade-in and test-drive scheduling; rules-driven follow-up from a Business Development Center (BDC); measure customer experience (CX) with outcome KPIs tied to pay-for-performance programs.
	Change in customers/consumers/users lifestyle	New way of use, perception of the product and the environment, relevance of the "car" as a product "status", increasing role of sharing economy and service, and work-from-home (WFH).	Improve service-value supply chain toward customers and car users, understand how different customer segment changed their mind about cars and their societal role.
Policy maker-related challenges	Charging-infrastructure gaps and user experience	Uneven public-charging density and reliability hinder BEV adoption.	"Charging concierge" and fast charging at point of sale; pre-vetted installer networks; bundled tariffs with utilities; proactive education and route-planning demos.
	In-vehicle data access and EU Data Act	Control over connected-car data determines who "owns" the customer relationship; dealers risk losing access if it is mediated solely by the OEM; compliance and consent management become core capabilities.	Stand up data-rights and consent flows at delivery; co-create services with OEMs and third parties; deploy first-party data lakes that lawfully unify touchpoints; monetise diagnostics/maintenance alerts as value-adding services.
	Policy-driven electrification (BEVs) and infrastructure mandates (EU AFIR; UK ZEV mandate)	Regulatory targets accelerate BEV mix while depressing traditional aftersales revenue (fewer wear-parts, longer service intervals) and shifting value toward charging, software, and energy services; dealers face range- and charging-anxiety frictions at the point of sale.	Build an EV-first profit stack: charging advisory and home/ workplace installation partnerships; bundled total-cost-of-ownership (TCO) sales scripts; BEV-specific service plans; participation in public-charging operations or "charging-as-a-service"; integrate battery-health reporting into trade-in/remarketing.
Technological-related challenges	Software-defined vehicles (SDVs) and over-the-air (OTA) updates	A growing share of value (features, fixes, upsell) bypasses physical service bays; recalls and feature activations can occur remotely, reducing dealer traffic but creating new lifecycle touchpoints if captured.	Move from repair-centric to lifecycle-centric: software and paid feature trials at delivery, OTA management, digital service plans, and data-driven outreach; invest in advanced driver-assistance systems (ADAS) calibration to keep high-margin technical work.
	Digitisation and digital transformation	Unable to exploit old channels and customer relationship mechanisms. Now, new sales channels, marketing touchpoints, software, and the need to increase the handling of data of any kind emerge.	Improve channels and customer relationships by investing in and improving key activities and key resources, also in terms of knowledge. New costs arise.
	Shaping the future of automotive	Emerging trends like autonomous driving, sharing economy, flexible production, connected services, and electromobility. The dealer loses its "exclusivity" over the cars and mobility to new actors, often operated by the same car brands (e.g., car2go)	Focus on improving key activities and key resources, looking for new partners. Be careful about potential costs adding to the existing structure.

As it emerged in Table 1, the dealer's BM is shifting from product-centric to service-centric, emphasising digitalisation, sustainability, recurring services, and cross-industry partnerships. Hence, dealers become part of a broader mobility and data ecosystem, where their margins rely on lifecycle management and value-added services rather than car sales alone (Figure 1).

5. THEORETICAL IMPLICATIONS

The study suggests that the BMI in the automotive sector is particularly impacting automotive dealers' sales and revenue streams (Kovalova and Vartiak, 2024), calling for a profound change to rethink their whole BM structure. Accordingly, the study, by unveiling five categories and 17 typologies of challenges, amplifies how automotive dealers are at a crossroads in their strategic development. The numerous changes unveiled in Figure 1 necessitate a reevaluation of the nature, scope, and role of the dealer in the automotive industry. The car dealer is shifting from being the car brand's last-mile distribution touchpoint to a stand-alone firm that is called to survive against the competition of the car brands that increasingly look for direct-to-consumer approaches. Finally, the study has proved the BM theoretical background as a useful lens to capture and frame automotive dealers' dynamics in the increasingly complex automotive industry. Through the adoption of the BM theoretical

lens, automotive dealers can respond to the call to change and cope with major challenges of their industrial context (Pizzichini et al., 2025). The same approach allowed for the theoretical recognition of challenges impacting directly on business model dimensions such as customer segments, partners, suppliers, and policymakers (Koroth et al., 2019).

Figure 1 – *Business model challenges for automotive dealers*

Key Partnerships	Key Activities	Value Propositions	Customer Relationships	Customer Segments
From car brands to: •Energy providers •Insurance and banks •Fleet operators •Tech startups •Software providers	Digitalisation, AI, data management and innovation become key activities alongside selling and customer relationship management. **Key Resources** From cars and facilities to data and software.	Less focus on cars and more focus on financial services, mobility-as-a-service, "rent" service and electric/environmentally friendly services	The relationship with customers happens through connected cars and services, it is increasingly digitised and driven by data. **Channels** Typical "tangible" sales channels has been paired by digital channels: from social media to virtual reality.	•Deal with GenZ and soon GenAlpha perception about cars that changes according to the older generation •More digital-savvy and price-sensitive consumers with online and omnichannel purchase journeys. •Growing attention to sustainability and the shift toward electric vehicles (BEVs). •For additional services (charging, software, predictive). maintenance).

Cost Structure	Revenue Streams
- The change calls for rising investments in digital platforms and customer lifecycle management, certifications, and regulatory compliance. - Change in margin pressure on vehicles (competition, tariffs, BEV subsidies), shifting profit focus to services.	From car sales to Recurring models (subscriptions, pay-per-use, short/long-term rentals) and upselling accessories (digital services, insurance, charging, and maintenance)

5.1 MANAGERIAL IMPLICATIONS

The study, by unveiling five categories and 17 typologies of challenges, presents a detailed roadmap for managers to cope with upcoming and present challenges characterising the automotive context. By presenting the impact of these challenges using the Business Model Canvas analytical tool, the study supports managers and entrepreneurs in the car dealership industry in understanding how to cope with such challenges. The study also pinpoints how the proficient adoption of tools such as the business model canvas allows (once again) to cope with changes and innovation even in incumbent firms.

6. CONCLUSION, LIMITATIONS AND FURTHER RESEARCH

The study research question "*How are automotive dealers responding to emerging challenges by innovating their business model?*" called to first identify categories and typologies of challenges and then to develop a BMI perspective of the impact of those challenges in the car dealers' context. To do so, the study adopted a single case study of an Italian medium-sized car dealer. The study identified 5 categories and 17 typologies of challenges that characterise the car dealer's BMI. The study also unveils the major changes that car dealers are called to cope with (Figure 1). Overall, the study suggests that car dealers are undergoing a significant shift, transitioning from being part of the car brand distribution structure to becoming standalone firms. This shift creates tensions between the old and the new structure and BM, calling car dealers to make swift changes to keep up with an increasingly fast-paced environment. The study presents a single-case study, which is still a work in progress; hence, the results are limited in both depth and scope. However, the study suggests that future research could be developed to enhance understanding of how the business relationship between the car brand and the car dealer has changed over time and how car dealers are now coping with an increasingly turbulent business context.

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