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The impact of electrification and digitalisation on Nordic dealer aftersales strategies

What has happened, and what will the future hold?

Christophe Guillaneuf and Thomas Chieux

ICDP 2025 Nordic study, part 3

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This year's ICDP Nordic study is broken up into three outputs, looking at network consolidation, Chinese new entrants, and the impact of electrification on the aftermarket

1. Network consolidation

- How have the previous forecasts of changes in structure and number of dealer and workshop outlets played out, and what is the forecast for the next 5-10 year period?
- This will also cover dealer group development in the Nordics as compared to other European markets, and assessments of where dealer groups have consolidated their positions by acquiring complementary activities such as importerships, aftersales businesses, etc.

2. Chinese new entrants

- What impact will the development of Chinese new entrant brands have across the EU, and in the Nordic markets in particular?
- This will include the observable impact so far, as well as their future prospects in terms of networks, business models, market positioning, pricing, etc.
- We will also cover the outcome and implications of the current EU anti-subsidy investigation into Chinese-built BEVs that may result in an additional EU-wide import tariff being imposed

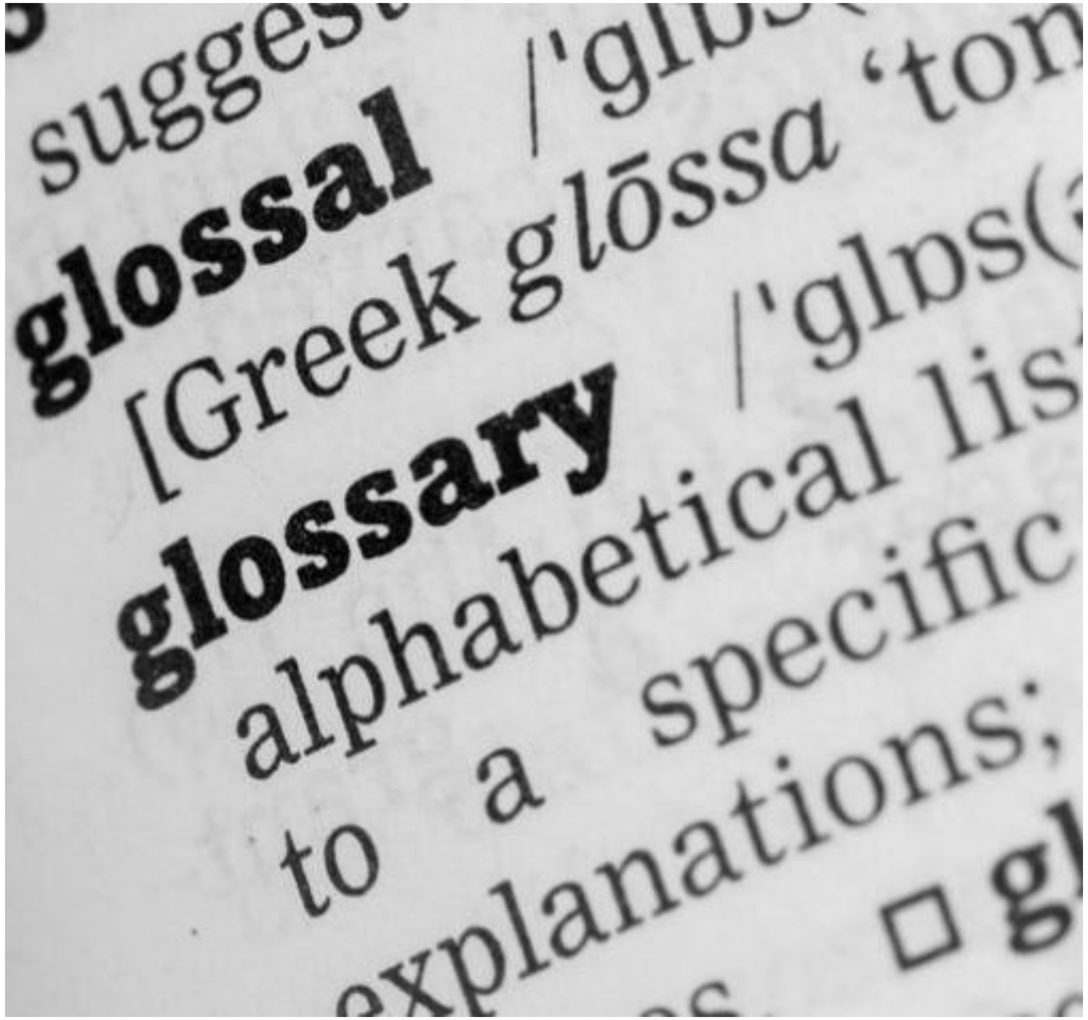
3. Electrification

- What has the impact of electrification been on the dealer aftersales business so far, and how will things evolve as EV penetration grows?
- This will include (depending on dealer participation) a comparison between the aftersales experiences of dealers in the Nordic markets and those of dealers in other European markets
- We will also look at the likely impact of other related developments, such as the growth of connectivity and of Over-the-Air updates substituting for some traditional workshop activities

Source: ICDP

Glossary of terms

- BEV: Battery Electric Vehicle
- BRC: Battery Repair Centre
- HV Battery: High Voltage Battery
- IAM: Independent Aftermarket
- ICE: Internal Combustion Engine
- OEM: Original Equipment Manufacturer i.e. Car Manufacturer
- OtA: Over-the-Air
- PC: Passenger Car
- SoH: State of Health
- WMS: Workshop Management System



With the support of the four dealer associations, we conducted a survey amongst a sample of OEM-franchised dealers across the Nordic markets, focusing on three aftermarket-related topics

1

- Impact of BEV technology
- Customer attitudes and expectations of dealer workshop organisation and the provision of additional services

2

- Strategies implemented by dealers to attract and retain customers owning 'older' cars

3

- Current and future impact of connected vehicles on dealer aftersales activities
- Current use of OtA technologies

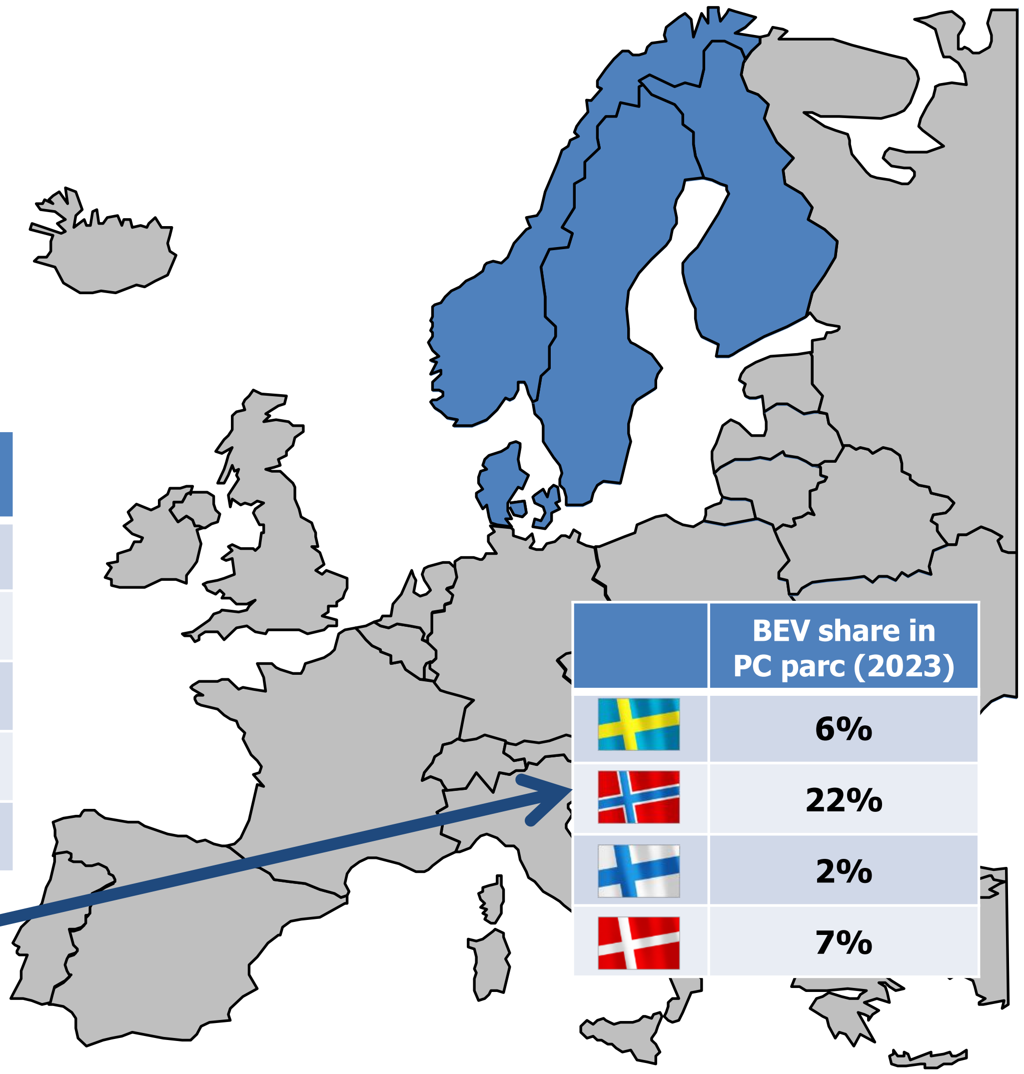
Source: ICDP

The survey was conducted online during the first quarter of 2025. In total 262 dealers accessed the questionnaire, providing 180 completed sets of questions

- Online survey among OEM franchised dealers and dealer groups
- 4 markets covered
  - Denmark
  - Finland
  - Norway
  - Sweden
- Sample size

	Total number of dealers accessing the survey	Total number of completed questionnaires	Average workshop size (# of technicians)
🇸🇪	96	65	*11*
🇳🇴	85	59	*14*
🇫🇮	47	33	*19*
🇩🇰	34	23	*18*
Total	**262**	**180**	

- Across a number of the questions, we will contrast Norway (as the most established BEV market) with the other 3 Nordic markets



	BEV share in PC parc (2023)
🇸🇪	**6%**
🇳🇴	**22%**
🇫🇮	**2%**
🇩🇰	**7%**

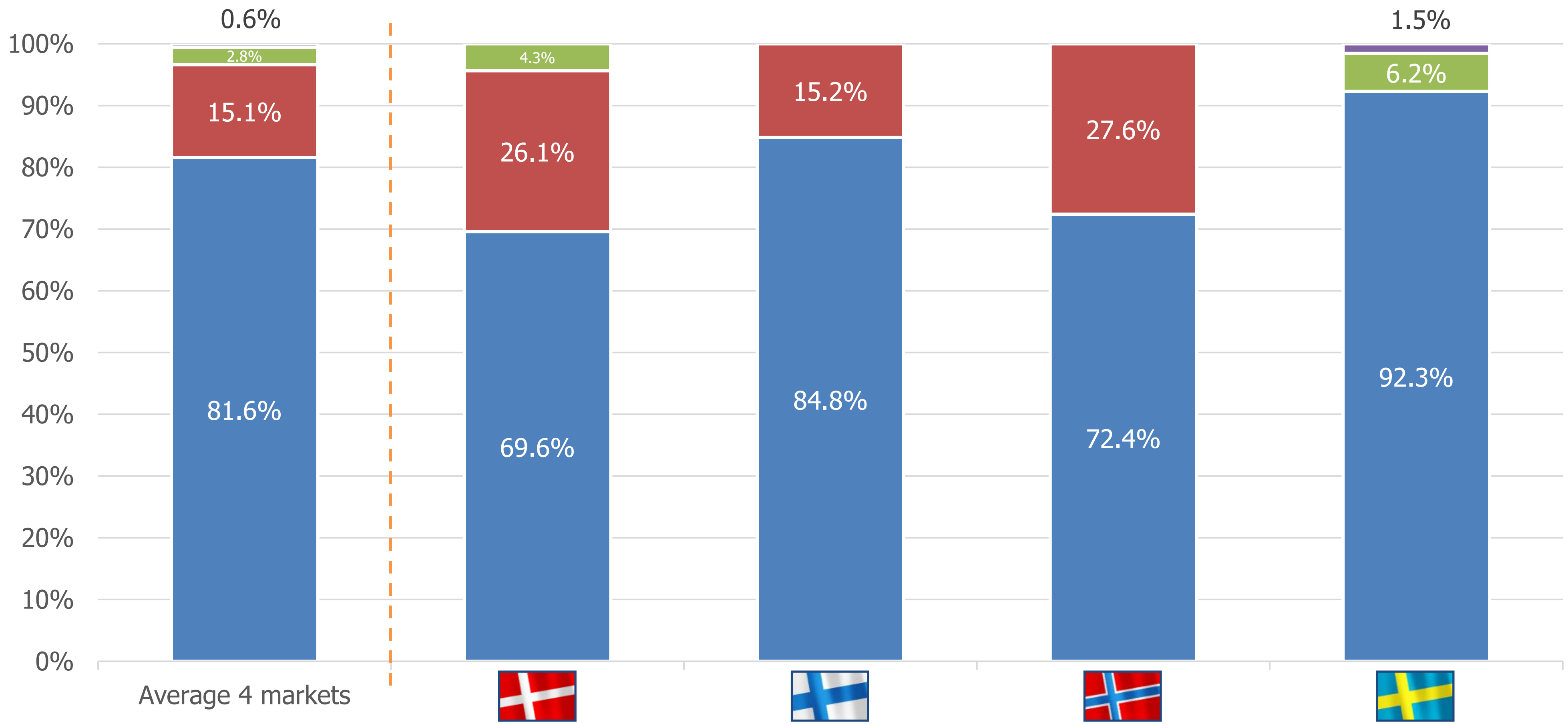
Source: ICDP and European Alternative Fuels Observatory

BEVs and aftersales activity – the impact of BEV technology and customer attitudes and expectations on dealer workshop organisation and the provision of additional services

1

Most technicians at Nordic dealers have the highest level of EV qualification, although this is not necessarily aligned with the current share of BEVs in the local car parcs …

Which of the following statements best describes the average current level of EV qualifications that your aftersales workshops have?



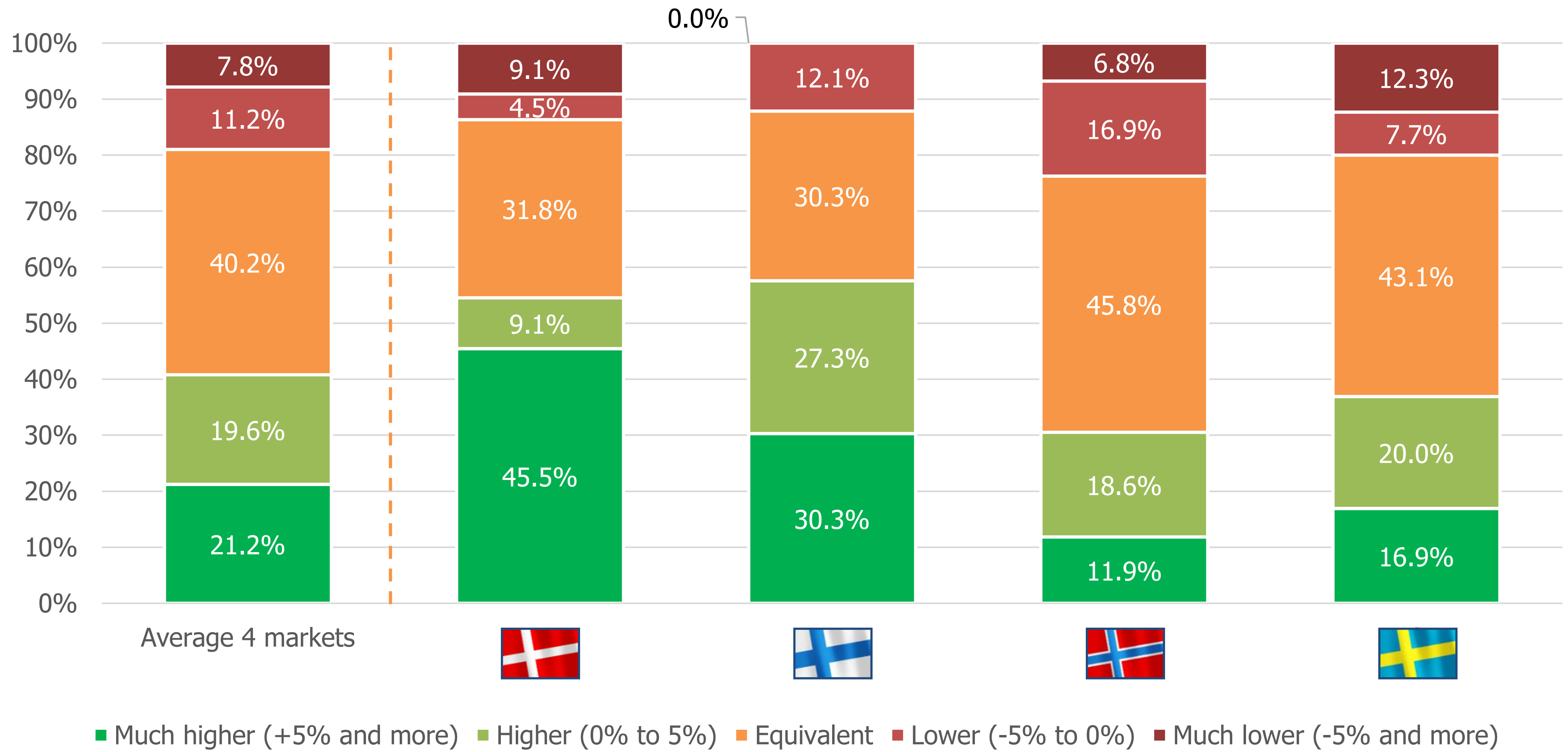
Source: ICDP Nordic dealer survey 2025; n = 179

Electric car customers – attitudes towards aftersales

1.a

Overall, 41% of the dealers considered that the loyalty of BEV customers for **service jobs** is much higher or higher than that of ICE customers

How would you assess the aftersales loyalty of BEV owners compared to ICE ones?

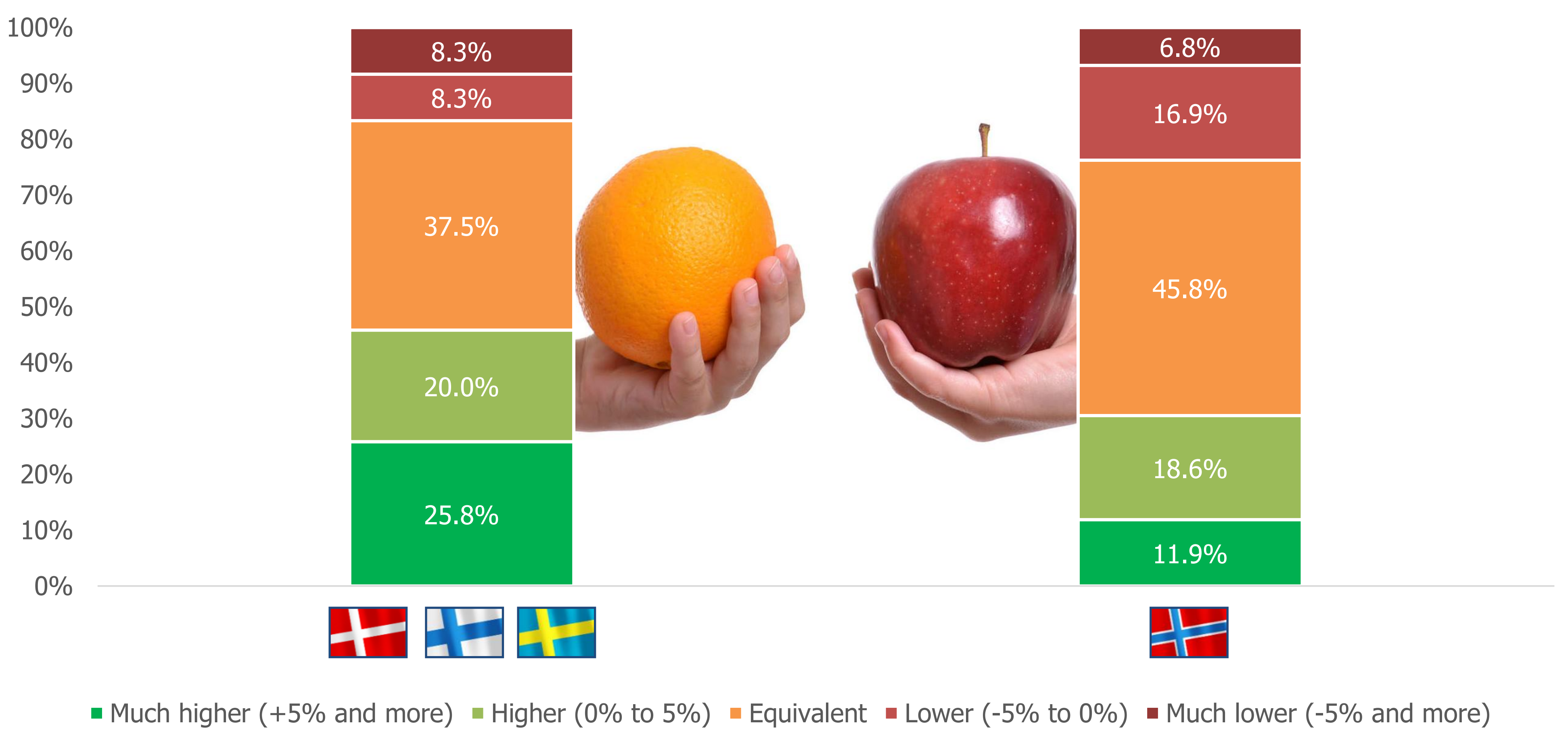


Loyalty

Source: ICDP Nordic dealer survey 2025; n = 179

BEV customer loyalty to dealers for **service**: Norway compared with the other Nordic markets

How would you assess the aftersales loyalty of BEV owners compared to ICE ones?



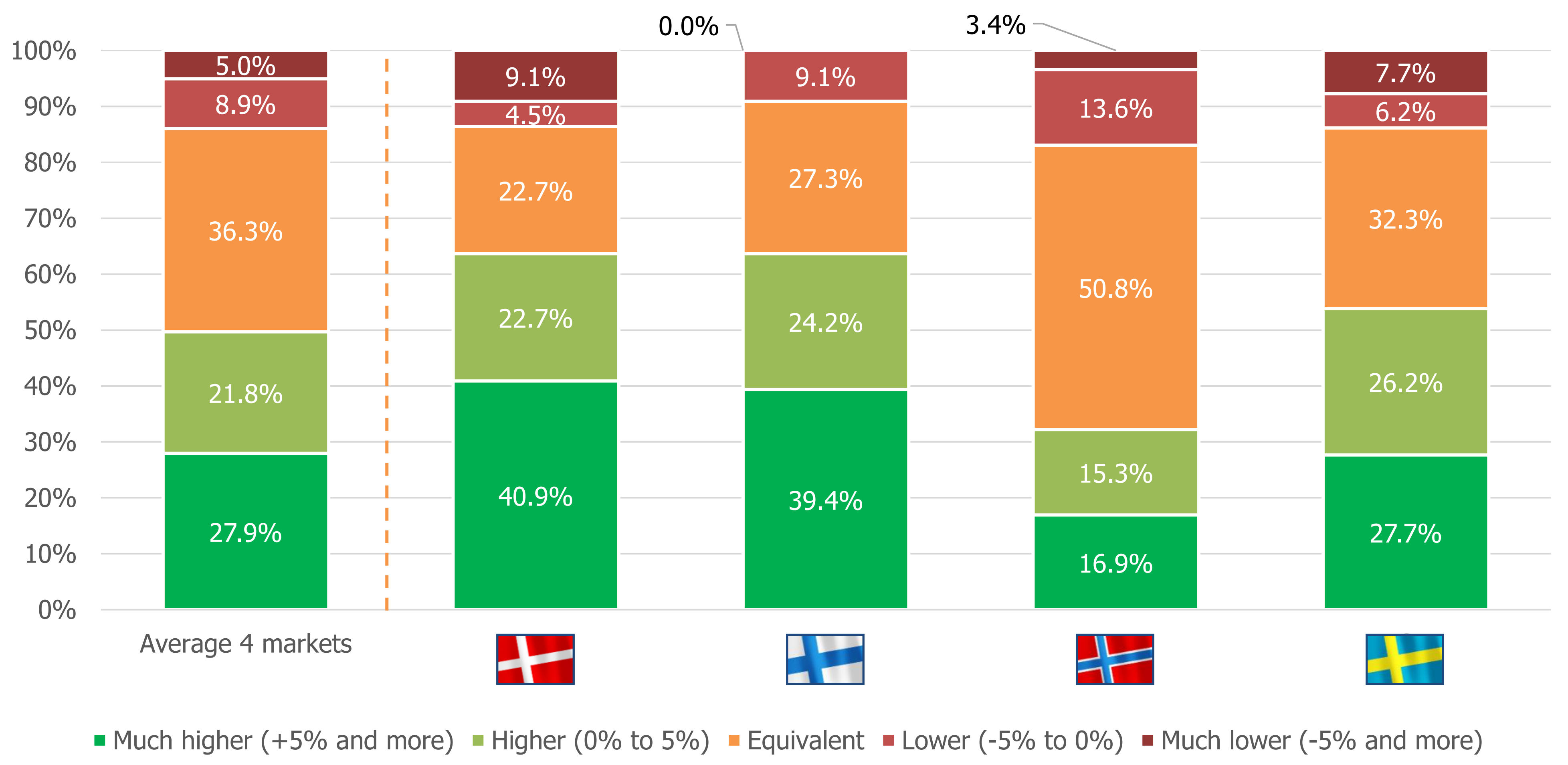
Loyalty

Comparing Norway with the other 3 markets tends to show that, **for service**, the higher starting loyalty of 'early adopter' BEV customers towards dealers tends to decline as BEVs spread to the mainstream market

Source: ICDP Nordic dealer survey 2025; n = 179

When it comes to **mechanical repairs**, the share of dealers who considered that BEV customers are more loyal than ICE customers is – logically – higher, at around 50%

“How would you assess the aftersales loyalty of BEV owners compared to ICE ones?



Loyalty

Service

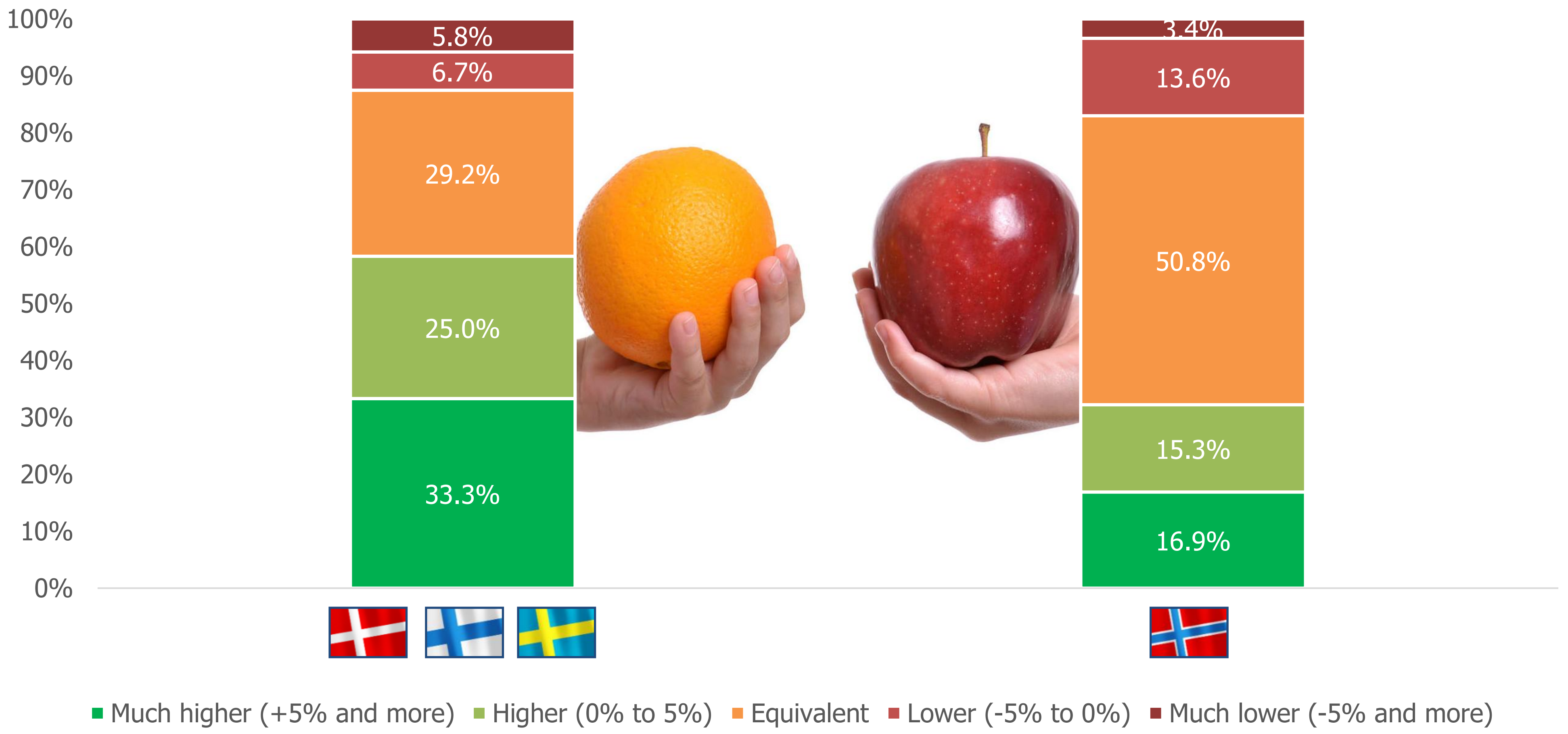
Repairs

Tyres

Source: ICDP Nordic dealer survey 2025; n = 179

BEV customer loyalty to dealers for **mechanical repairs**: Norway compared with the other Nordic markets

“How would you assess the aftersales loyalty of BEV owners compared to ICE ones?

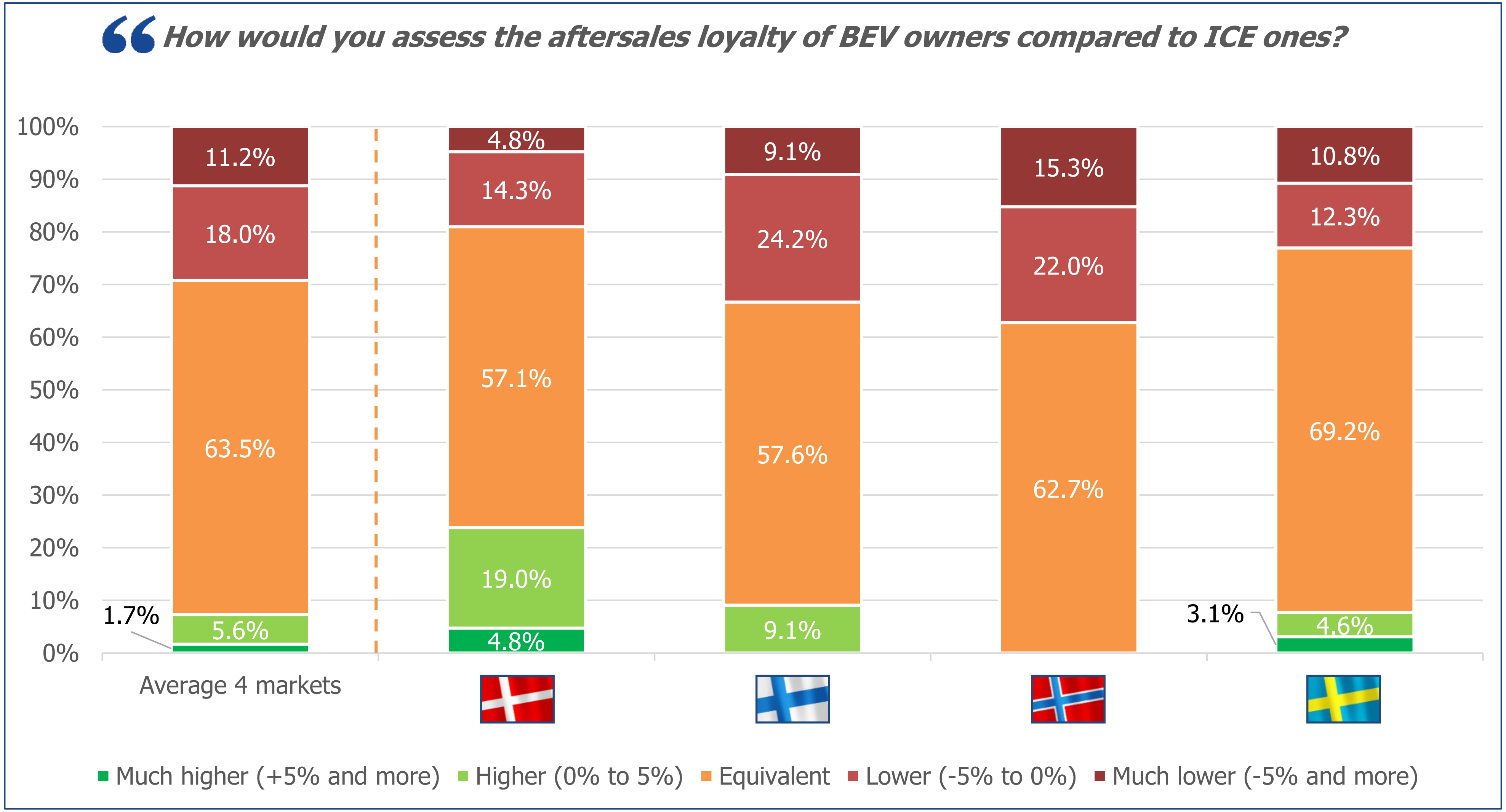


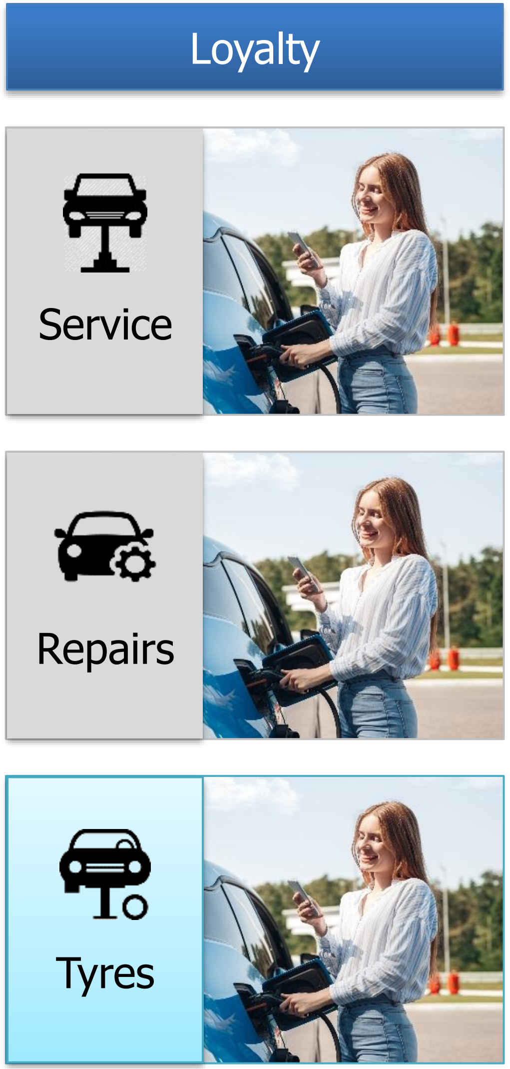
Loyalty

The same conclusion **for mechanical repairs** as for servicing: the higher starting loyalty of ‘early adopter’ BEV customers towards dealers tends to decline as the BEV share in the car parc increases

Source: ICDP Nordic dealer survey 2025; n = 179

For **tyre replacement operations**, 64% of Nordic dealers felt that BEV customers are as loyal as ICE customers, or even less loyal for 29% of them

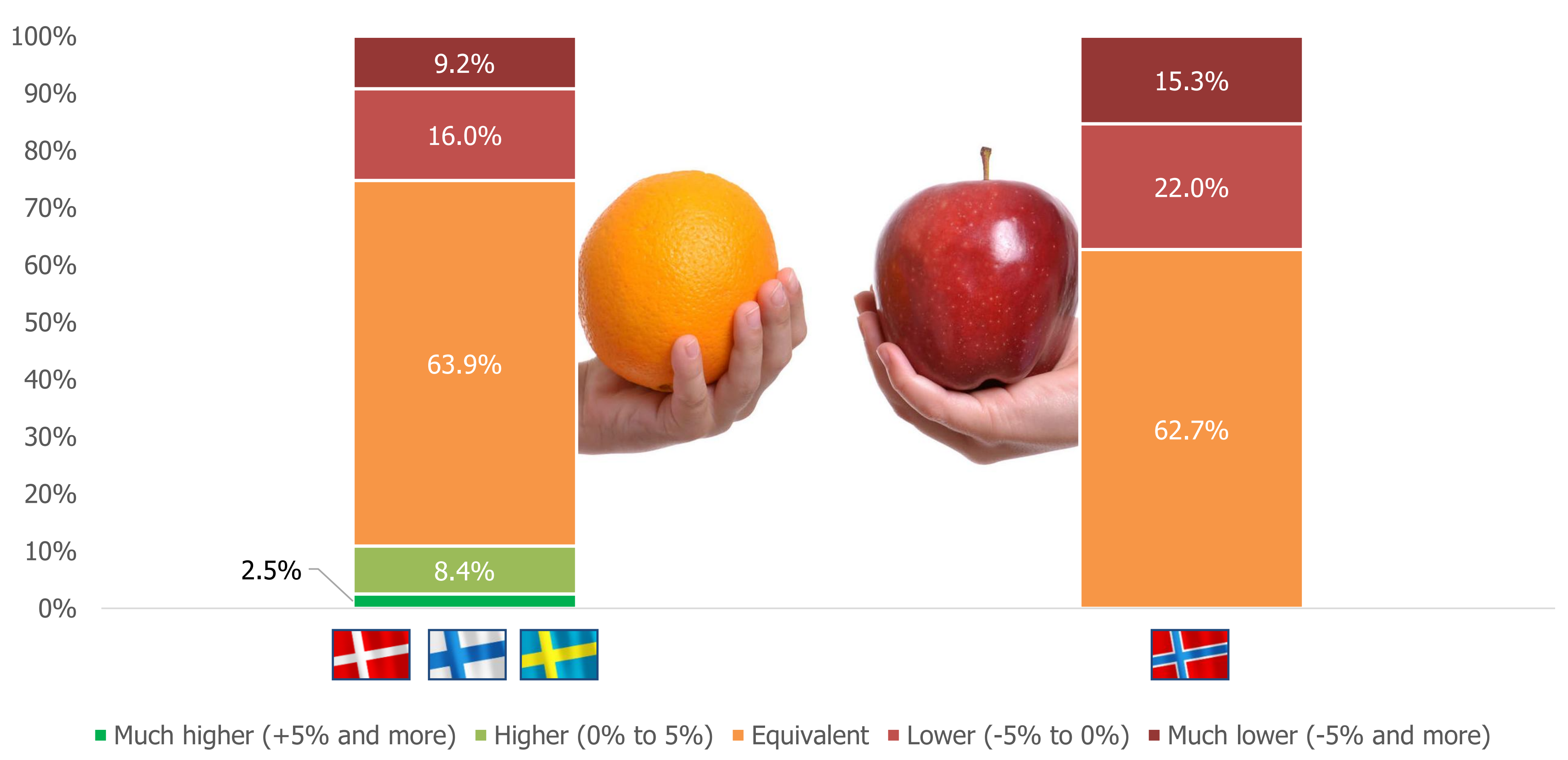




Source: ICDP Nordic dealer survey 2025; n = 179

BEV customer loyalty to dealers for **tyre replacement operations**: Norway compared with the other Nordic markets

How would you assess the aftersales loyalty of BEV owners compared to ICE ones?



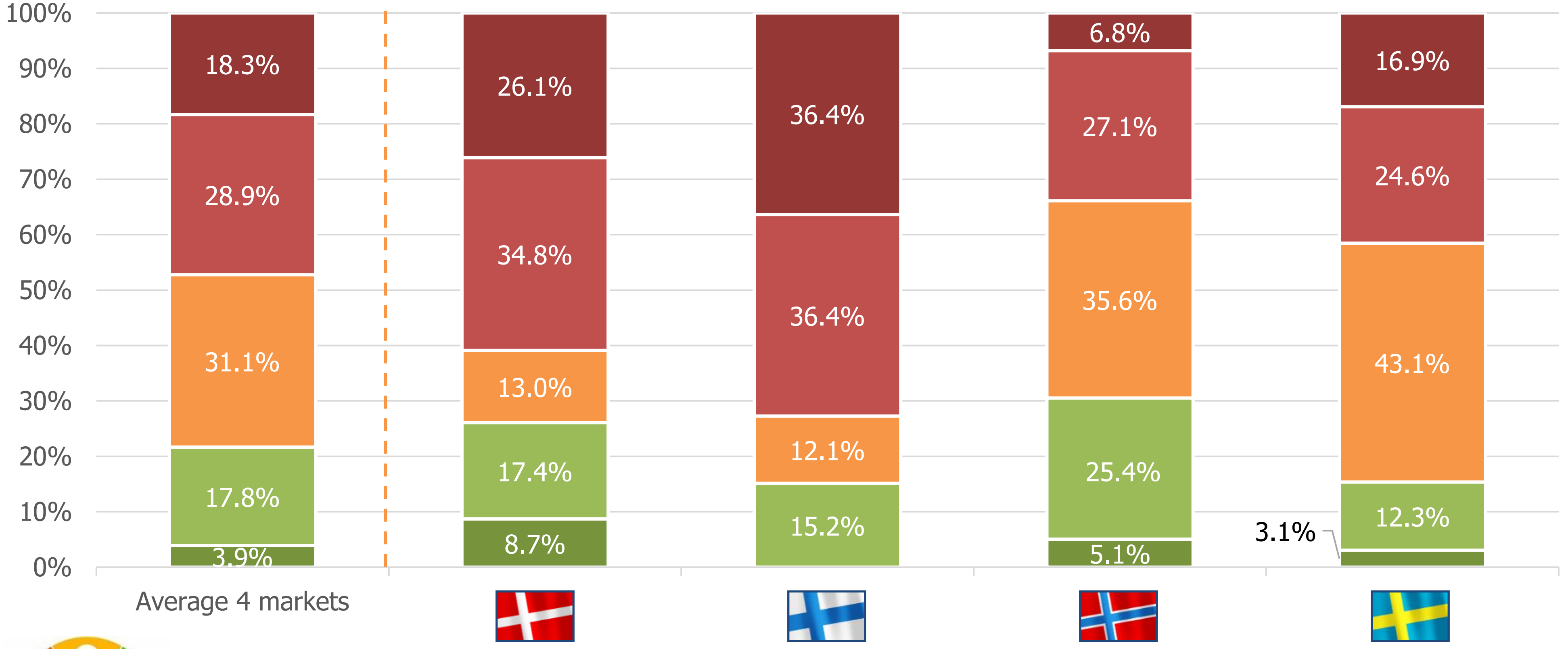
Loyalty

For tyres, the comparison between Norway and the 3 other markets shows a fairly balanced outcome. This might mean that loyalty of BEV owners towards dealers remains stable (and low?) as BEVs spread to the mainstream market

Source: ICDP Nordic dealer survey 2025; n = 179

A clear majority of Danish and Finnish dealers didn't feel that BEV customers are less inclined to comply with OEM service recommendations. However, Norwegian and Swedish dealer views are more nuanced

"BEV owners are less willing to comply with OEM recommendations in terms of service intervals than ICE owners

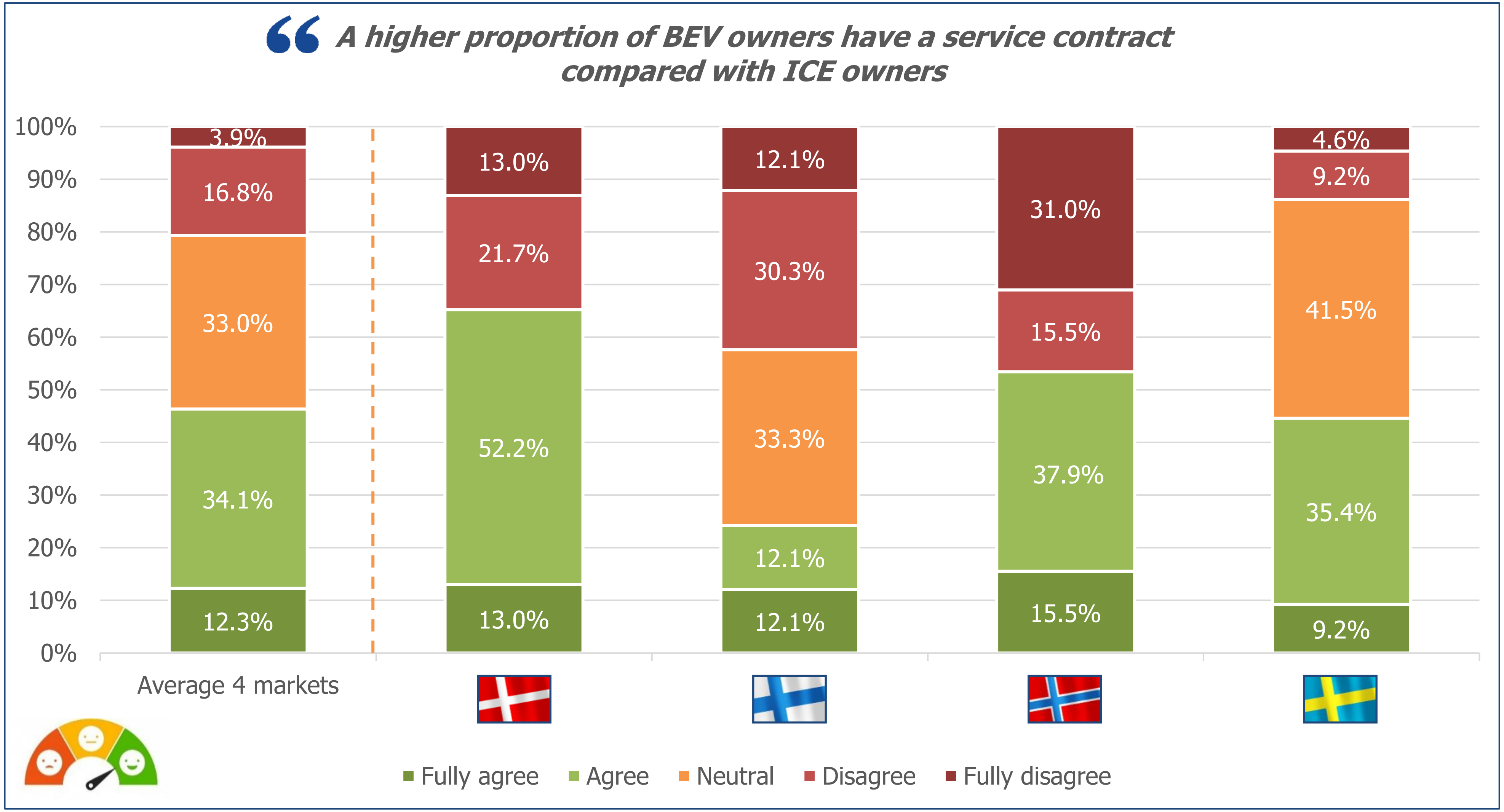


Service recommendations

Comparing Norwegian dealers' perceptions with those of the other markets tends to show that, as BEV customers grow more used to their car, a proportion of them stop fully complying with their OEM's service interval recommendations

Source: ICDP Nordic dealer survey 2025; n = 180

Dealers in all markets apart from Finland felt that their BEV customers are more likely to have taken out a service contract than ICE customers



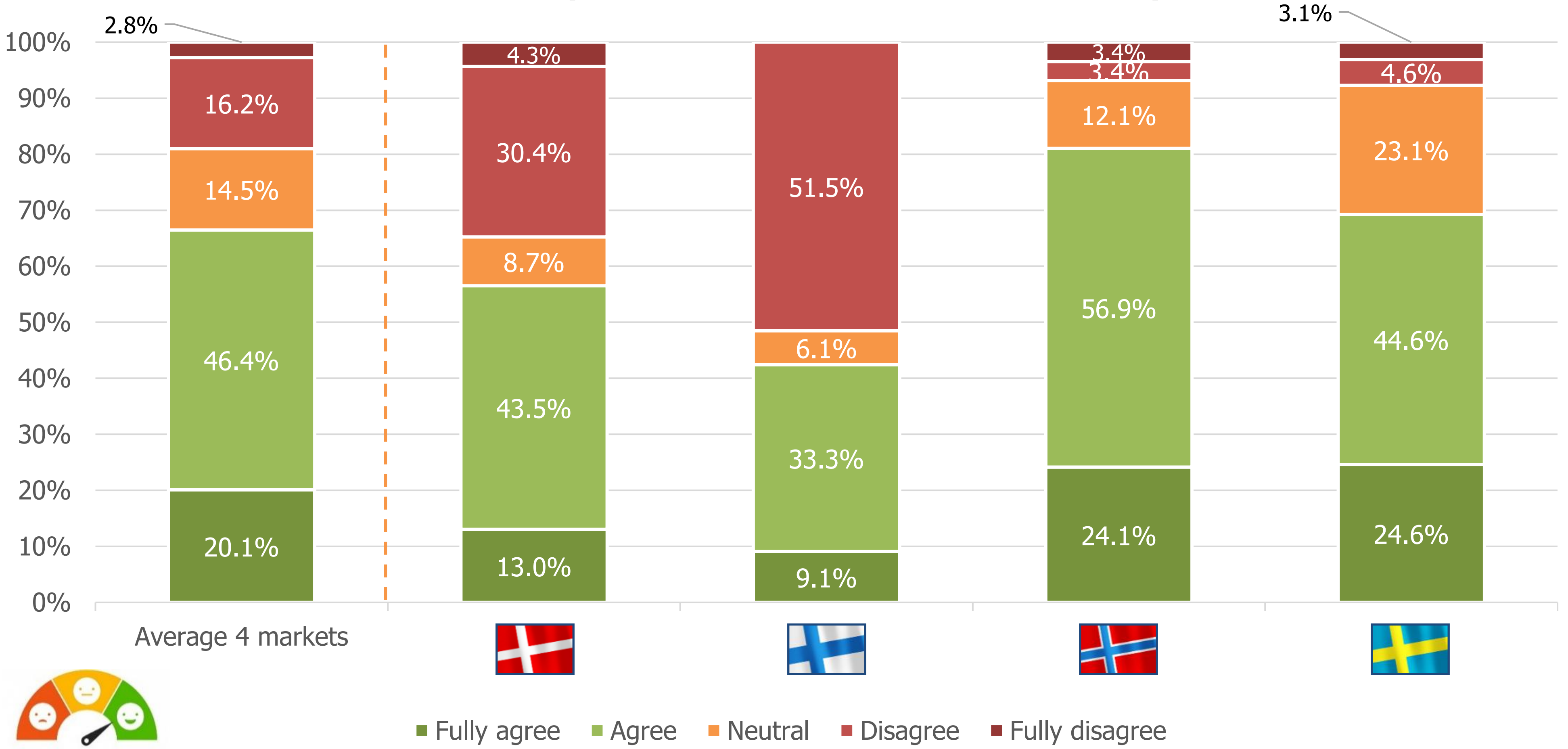
Service contract

Overall, dealers perceived that BEV owners are more likely to have a service contract versus ICE customers. However, this view varied widely across markets, and in Norway, dealers' opinions were much more balanced

Source: ICDP Nordic dealer survey 2025; n = 179

Two-thirds of the dealers felt that BEV customers would NOT be prepared to pay as much for routine servicing as they would for an ICE car

“For routine service, BEV owners are not prepared to pay as much as they would for an ICE ("there isn't that much to do on a BEV")

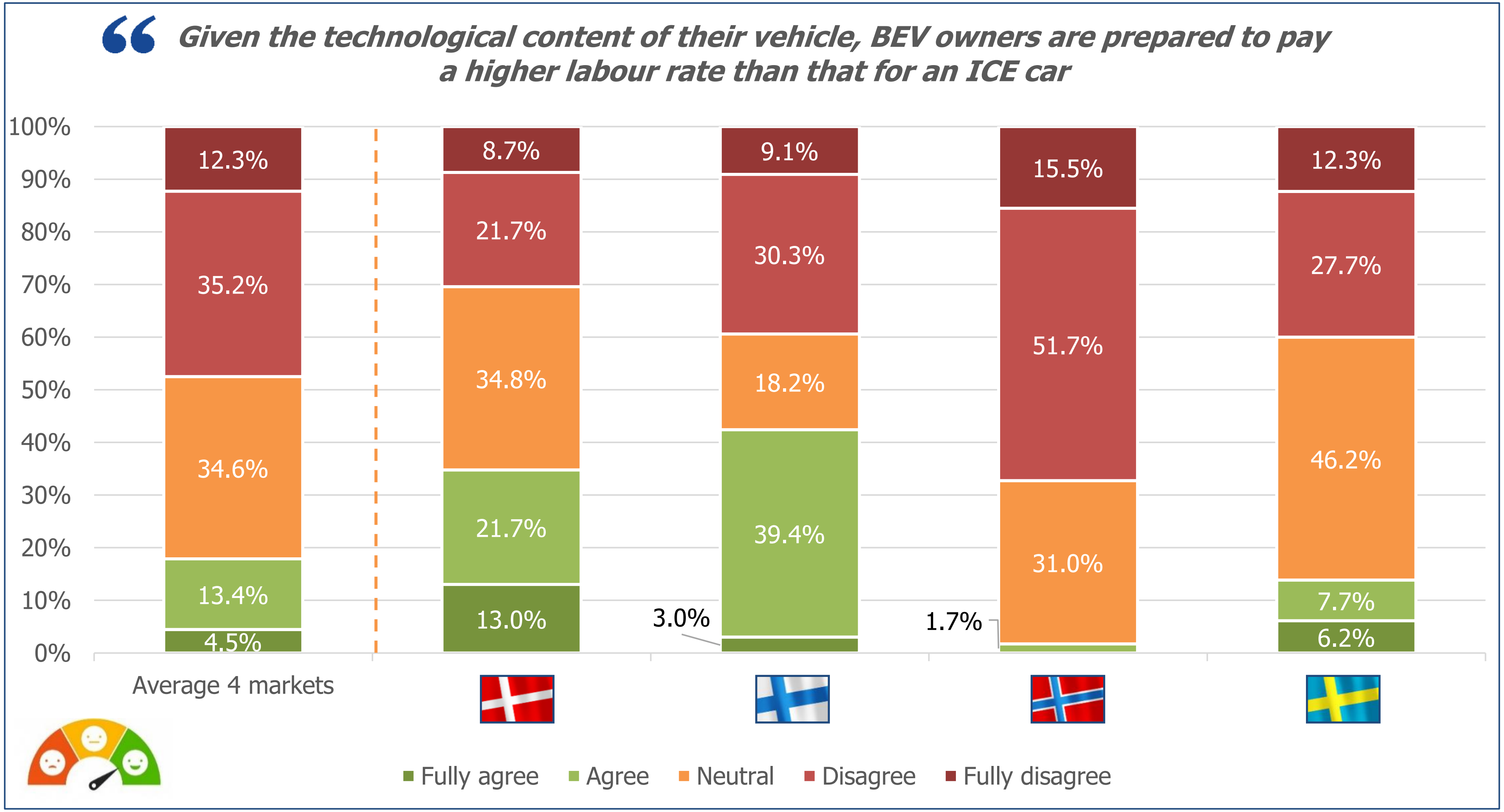


Preparedness to pay

Dealers felt that BEV customers will increasingly expect lower service costs than for ICEs, to match the lighter needs of their BEV. The responses from Norwegian dealers suggest that this trend is strengthening as the BEV parc grows

Source: ICDP Nordic dealer survey 2025; n = 179

48% of the dealer respondents felt that BEV customers would not be prepared to pay a higher aftersales labour rate than for an ICE car, despite the higher technological content of their BEV



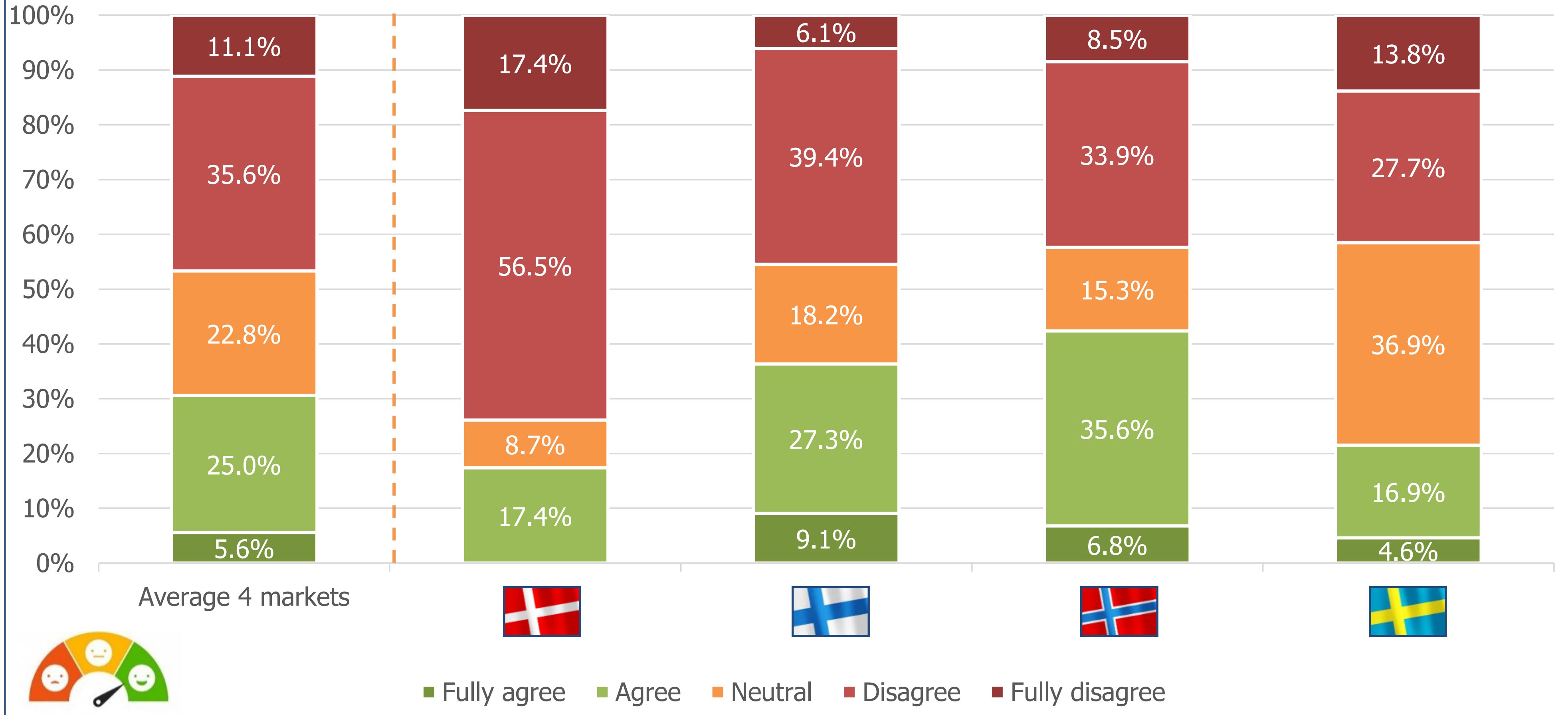
Preparedness to pay

More widely, as BEV customers get more used to their car's technology, they do not see why they should pay a BEV-specific labour rate. Again, this trend is confirmed by the responses from Norway, the most established BEV market

Source: ICDP Nordic dealer survey 2025; n = 179

Around 47% of dealers felt that the overall expectations of BEV customers were the same as those of ICE customers, although responses ranged from 74% in Denmark down to 42% in Sweden

“There is no difference between the behaviour of BEV owners and that of ICEs in terms of aftersales (i.e. no impact on the workshop overall organisation)”



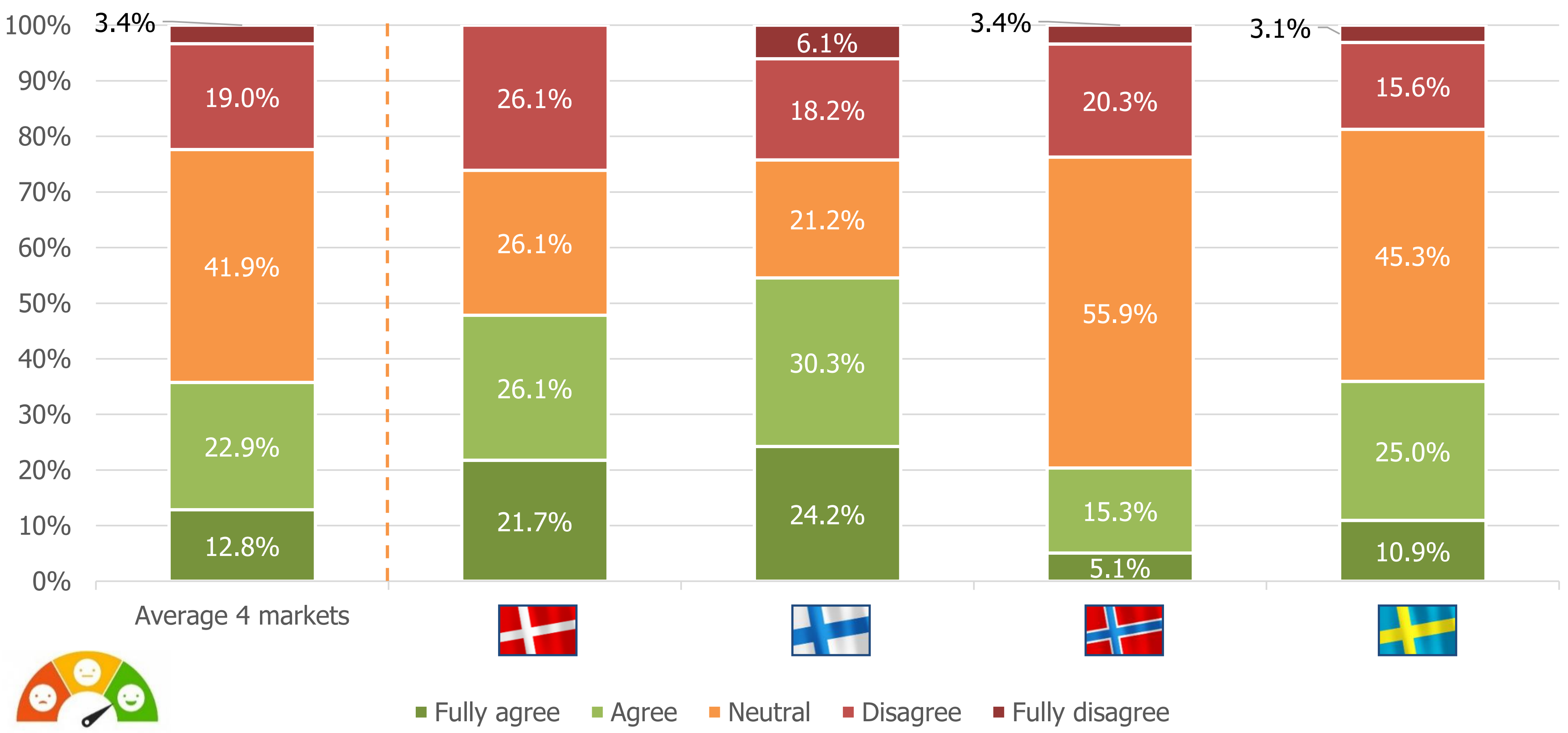
Overall aftersales behaviour

Overall, the dealers felt that they might need to make changes in their workshop organisation to handle more BEVs. However, the views of Norwegian dealers were more mixed on this point

Source: ICDP Nordic dealer survey 2025; n = 180

When it comes to service quality, Danish and Finnish dealers felt that BEV customers are more demanding than ICE ones, but their Norwegian and Swedish counterparts had a more neutral view

“BEV owners are more demanding over aftersales quality than ICE owners

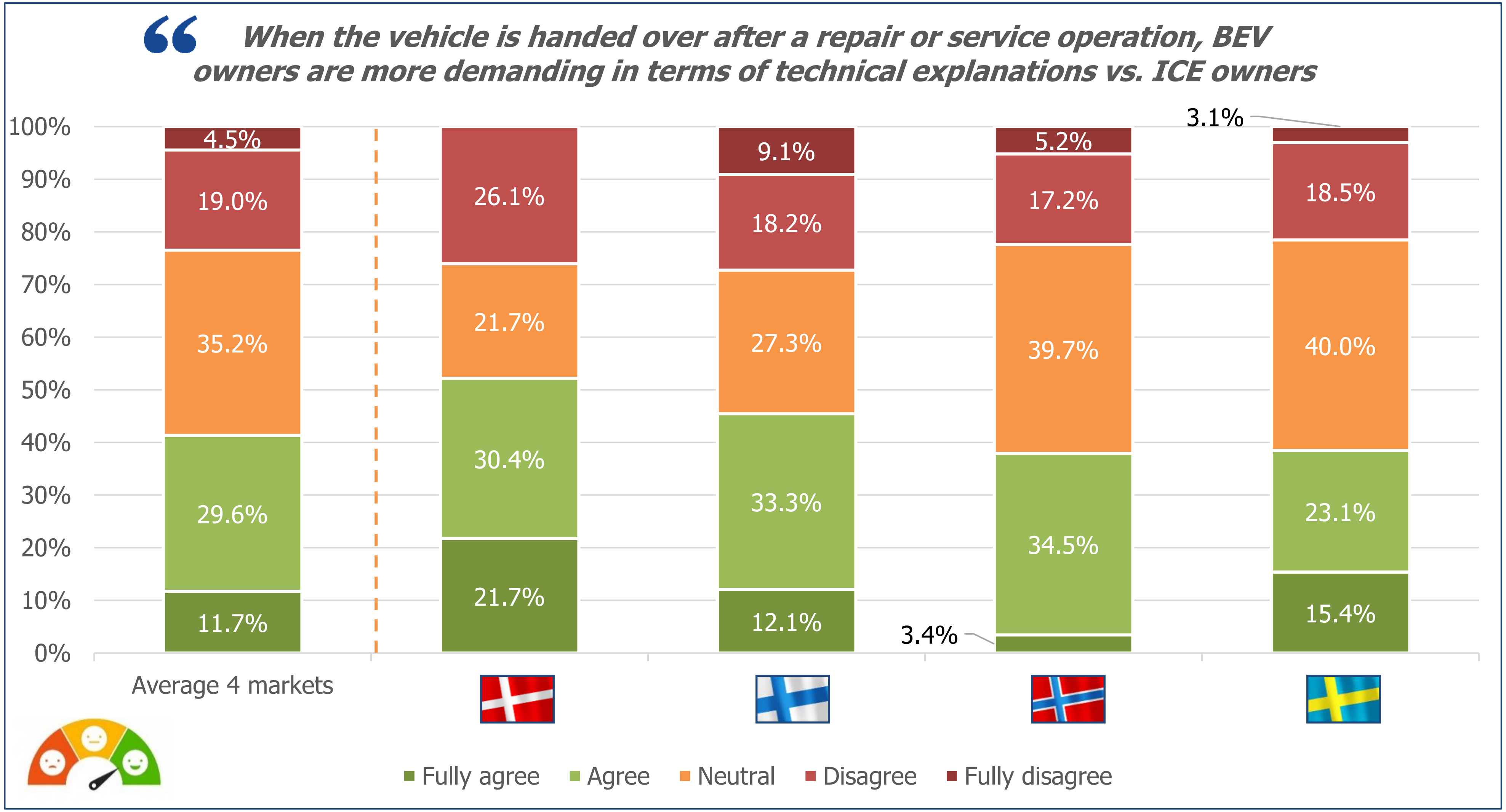


Quality of work

The same comment applies to service quality expectations. Danish, Finnish, and Swedish dealers felt that BEV customers were more demanding than ICE customers, but the Norwegian dealers did not necessarily agree …

Source: ICDP Nordic dealer survey 2025; n = 179

However, the dealers (especially in Denmark) did generally agree that BEV customers are more demanding than ICE customers when it comes to wanting aftersales work to be explained to them fully

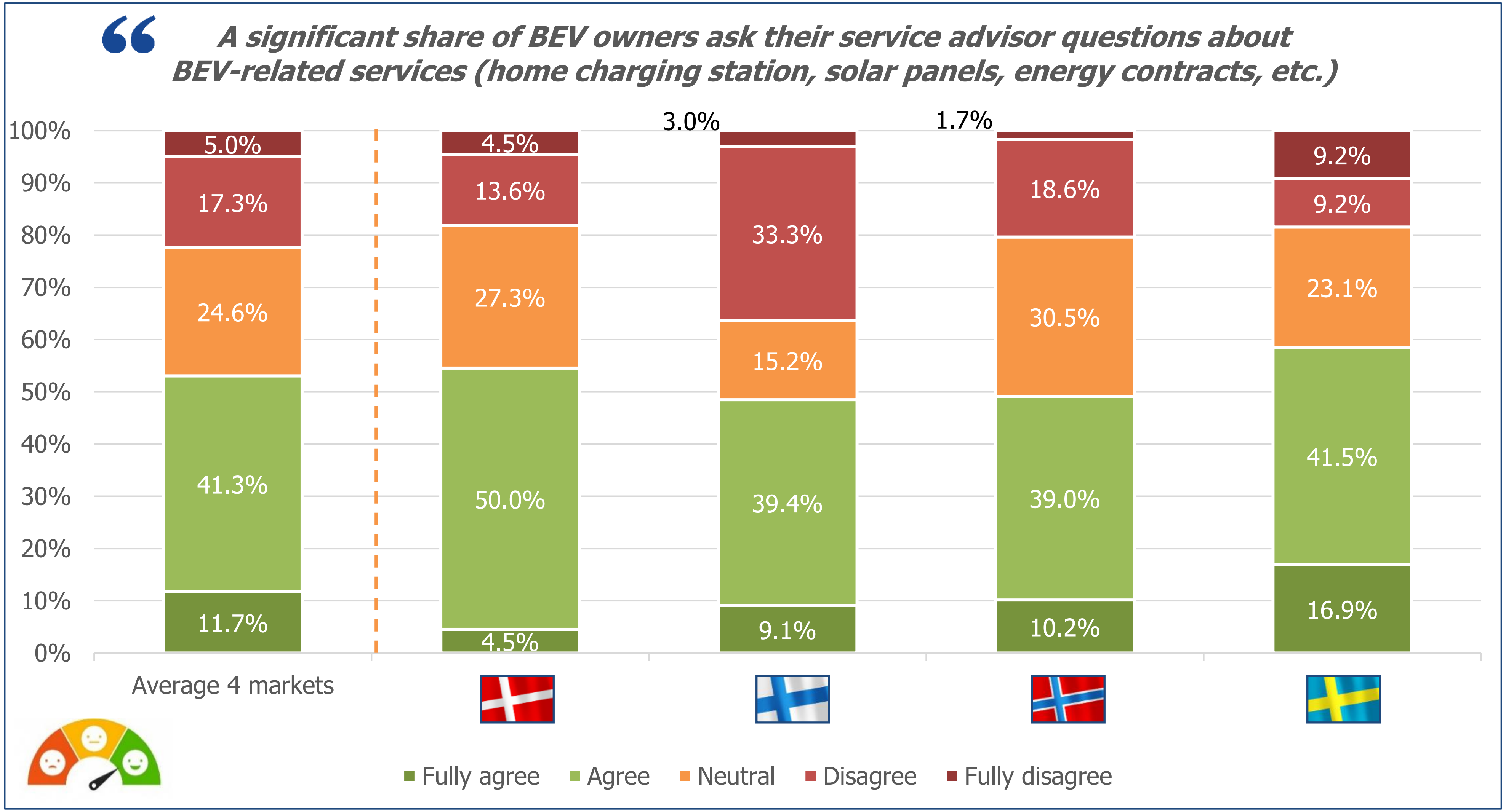


Technical information

Overall, aftersales advisors need to be ready to answer technical questions when they hand BEVs back to customers after service or repair work

Source: ICDP Nordic dealer survey 2025; n = 179

However, the dealers (apart from in Finland) did generally agree that BEV customers tend to turn to their aftersales advisor when they have questions about BEV-related services



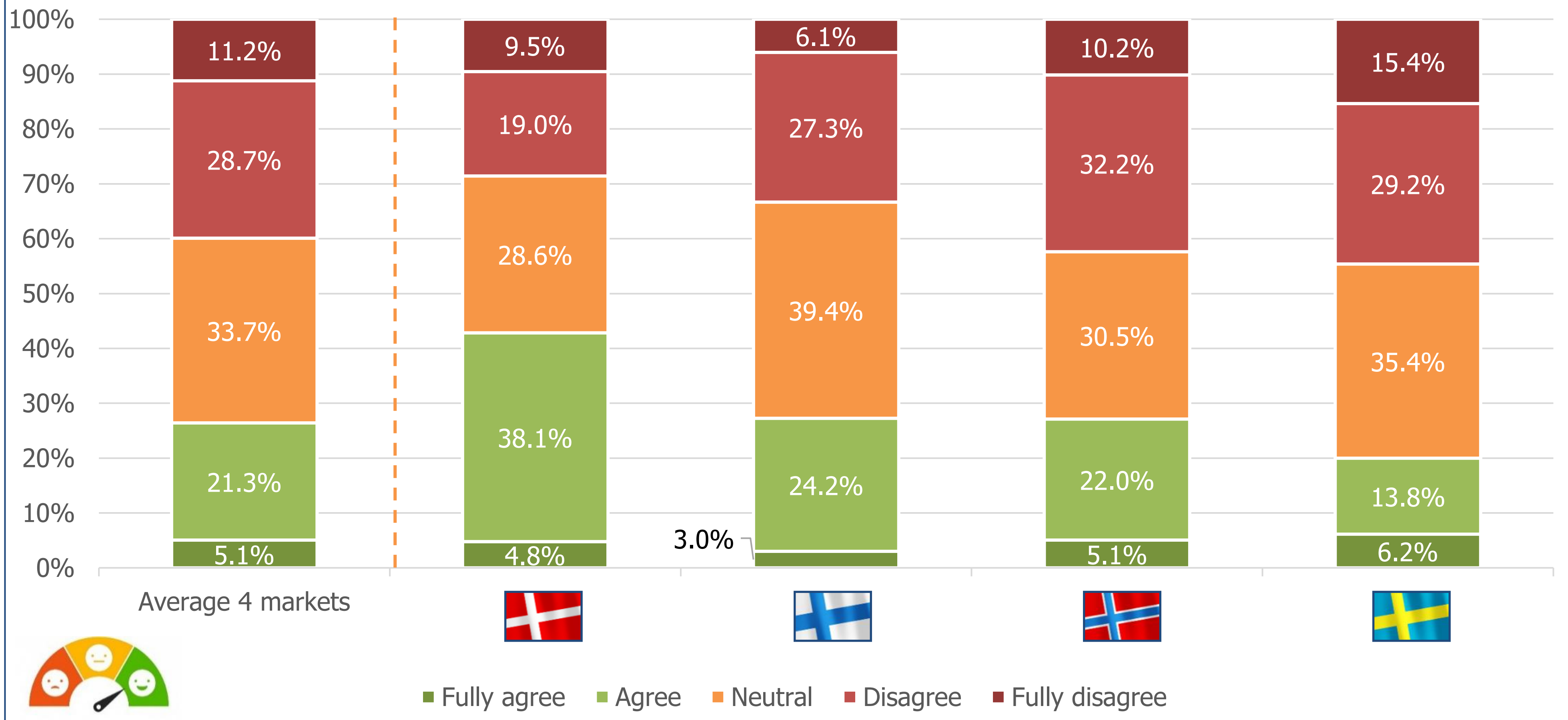
BEV-related services

Aftersales advisors also need to be ready to provide practical information on a wide range of BEV-related services

Source: ICDP Nordic dealer survey 2025; n = 179

40% of dealers felt that BEV customers tend not to ask questions when they are at the workshop around how best to protect the car's HV battery during recharging

A significant share of BEV owners ask their service advisor for explanations on how best to protect their HV battery when recharging it



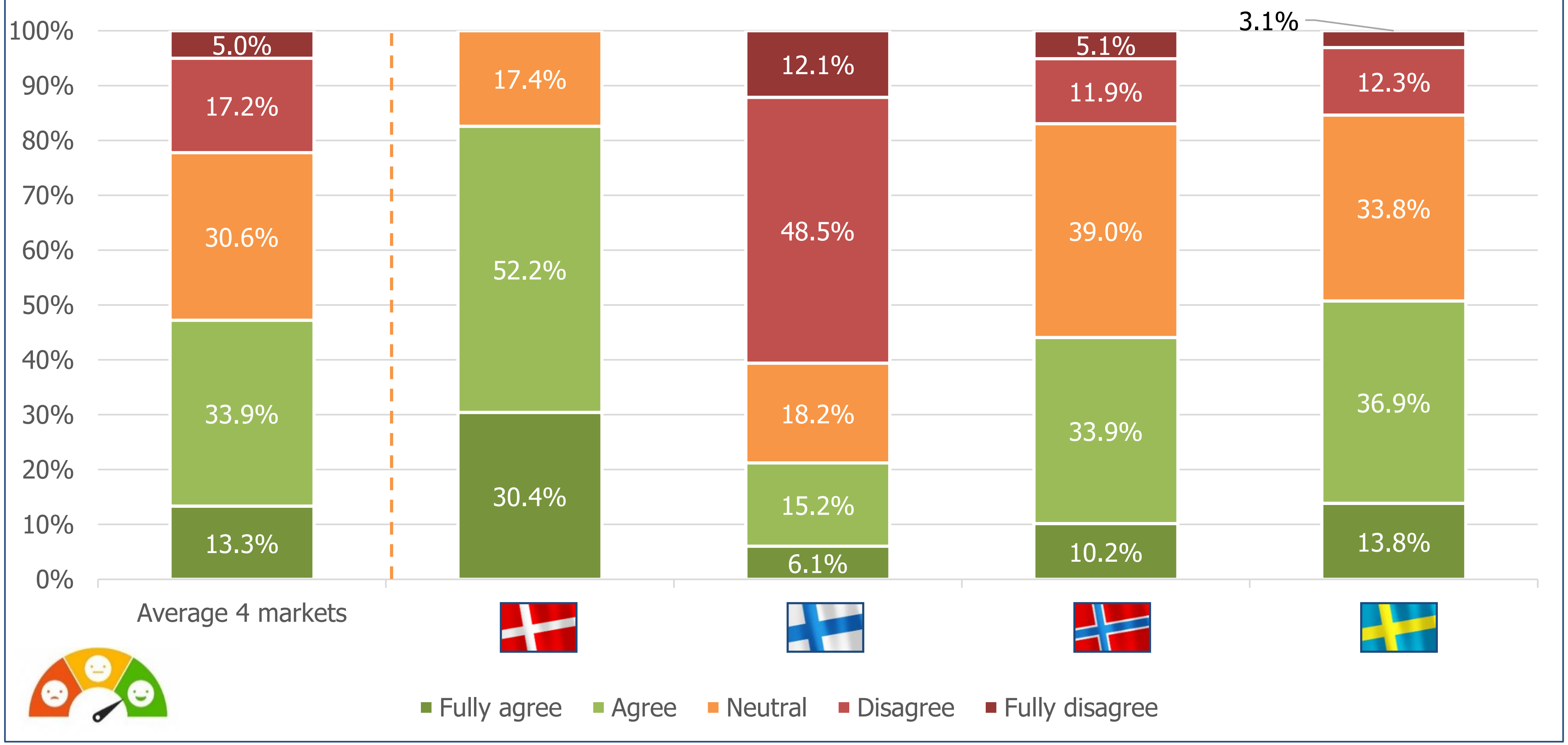
HV battery charging

But, on the whole, as customers get more used to BEV technology, fewer of them will need to ask for advice related to the battery recharging process

Source: ICDP Nordic dealer survey 2025; n = 179

Dealer views on the overall workshop impact of BEVs varied. While 83% of Danish dealers felt that service and repair jobs had fallen and crash repair work grown, only 21% of Finnish dealers agreed

“Service and repair jobs have decreased while crash repair jobs have increased during the past five years



Crash repairs

For those dealers operating crash repair facilities, the number of jobs generated by BEVs does appear to be offsetting the fall in the number of mechanical service and repair jobs

Source: ICDP Nordic dealer survey 2025; n = 180

In summary, if we consider the Norwegian dealers' current perceptions as an illustration of what could happen in the near future in the other Nordic markets, some conclusions are already emerging …

Repair and maintenance

- BEV customers' overall aftersales behaviour is getting closer to that of ICE customers
  - Although they are slightly more likely to have a service contract ...
  - … Their higher starting loyalty towards dealers tends to decline – at least for service and repair
- As they become more accustomed to their car, customers grow more able to weigh up the pros and cons of BEV technology
  - They feel that the price they pay for service should be consistent with the lighter service needs of BEVs
  - Some of them do not even fully comply with the OEM service recommendations
  - And they do not see why they should pay a BEV-specific labour rate, no matter what the type of job
- In terms of BEV-related services offered by dealers
  - Customers tend not to need any further advice over battery charging
  - But aftersales advisors need to be ready to answer technical and practical questions when they hand over vehicles
- Overall, the handling of BEVs may lead both to changes in workshop organisation, and to a need to provide a higher quality of service. However, Norwegian dealers' views remain mixed on those points

Crash repairs

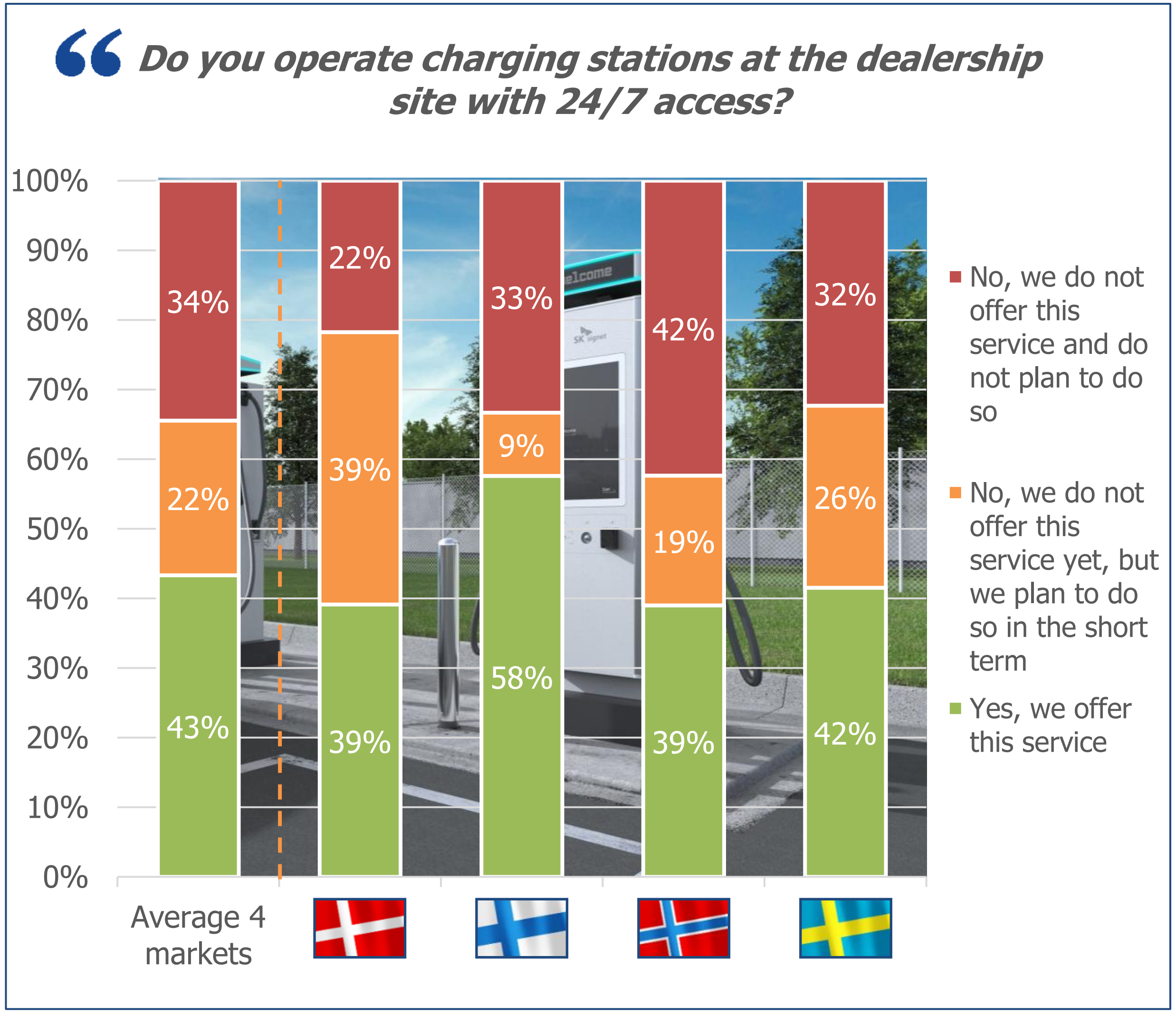
- For those dealers handling crash repairs, the number of operations generated by BEVs continues to offset the fall in the number of service and repair jobs

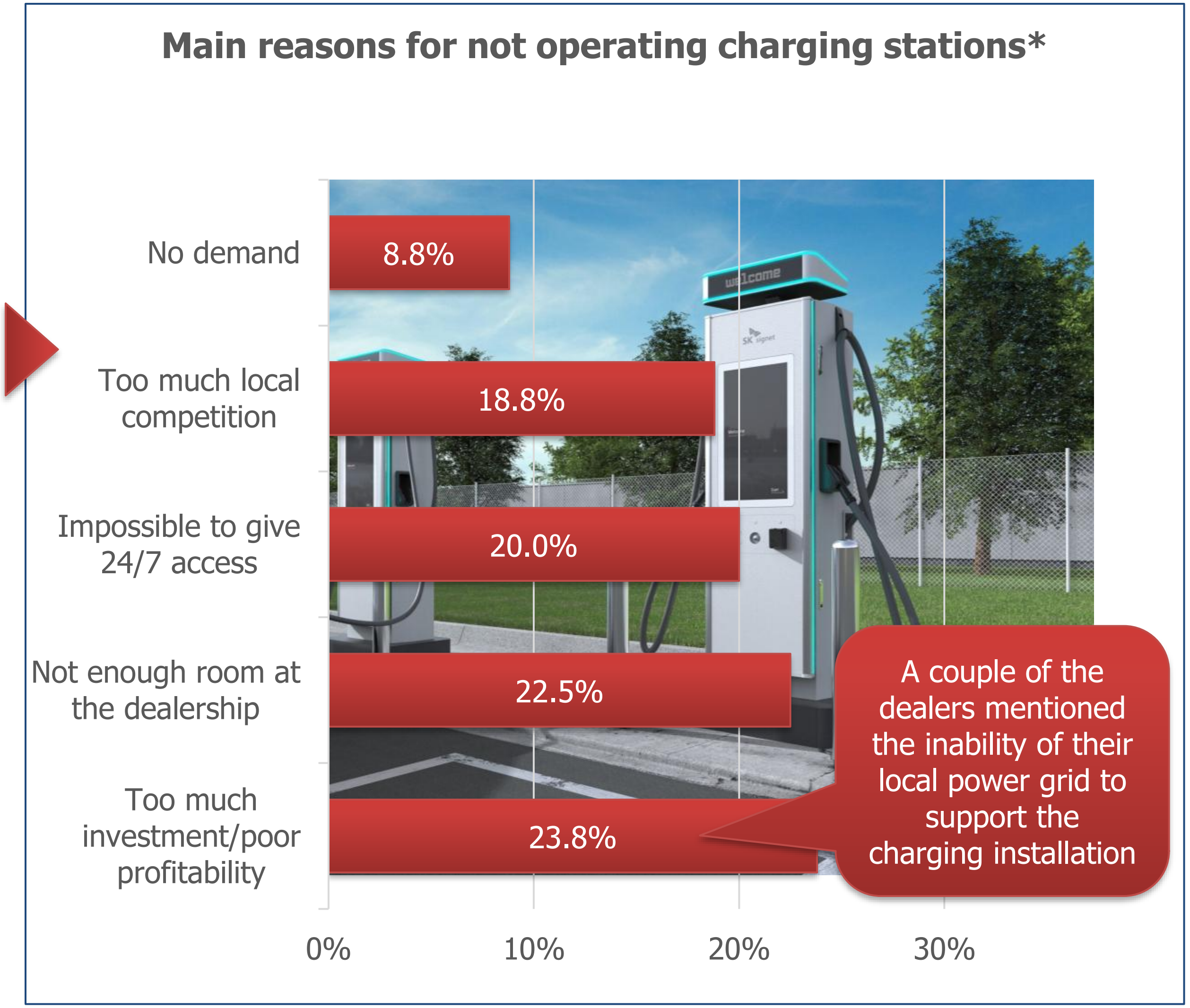
Source: ICDP

BEVs and additional services – charging stations and battery repair centres

1.b

43% of the respondent dealers operate 24/7 charging stations, with Norwegian dealers the least equipped. The main reasons for not offering this service were the lack of return and the lack of space …

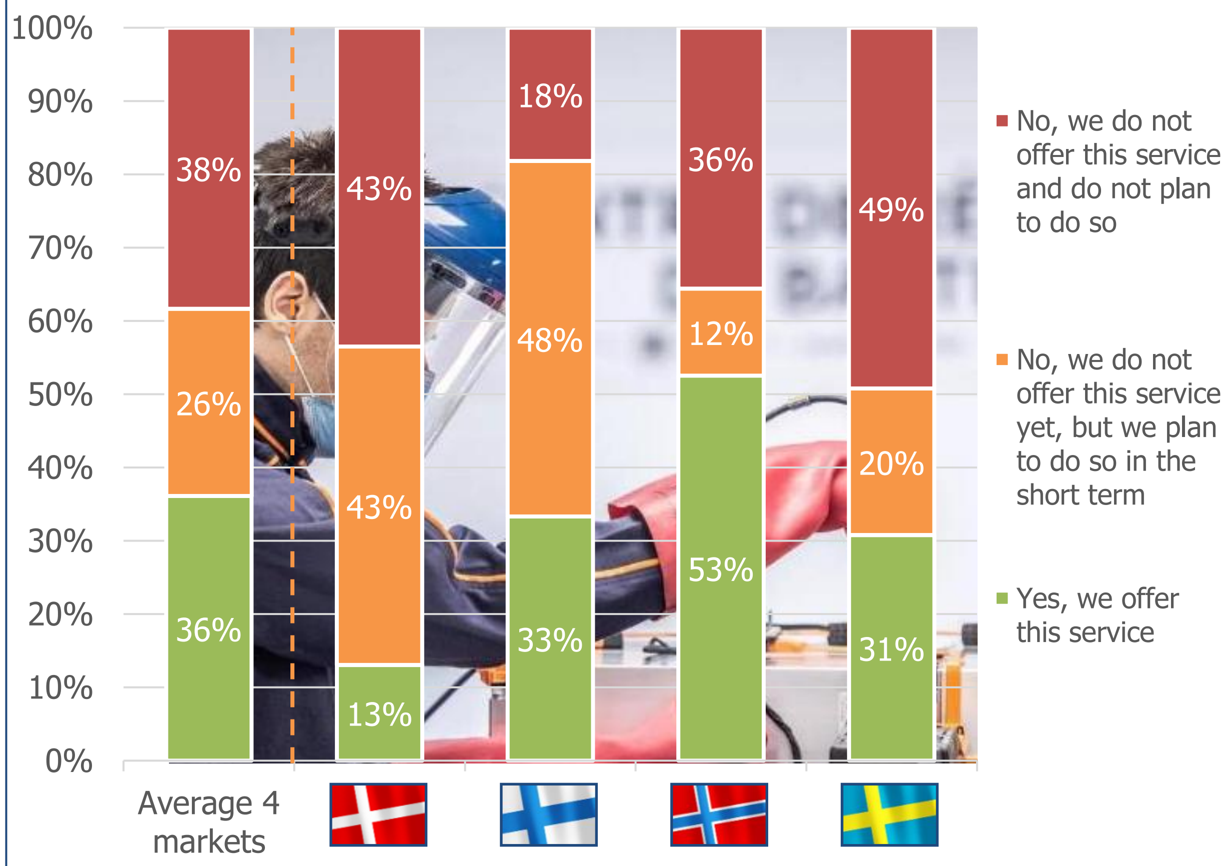




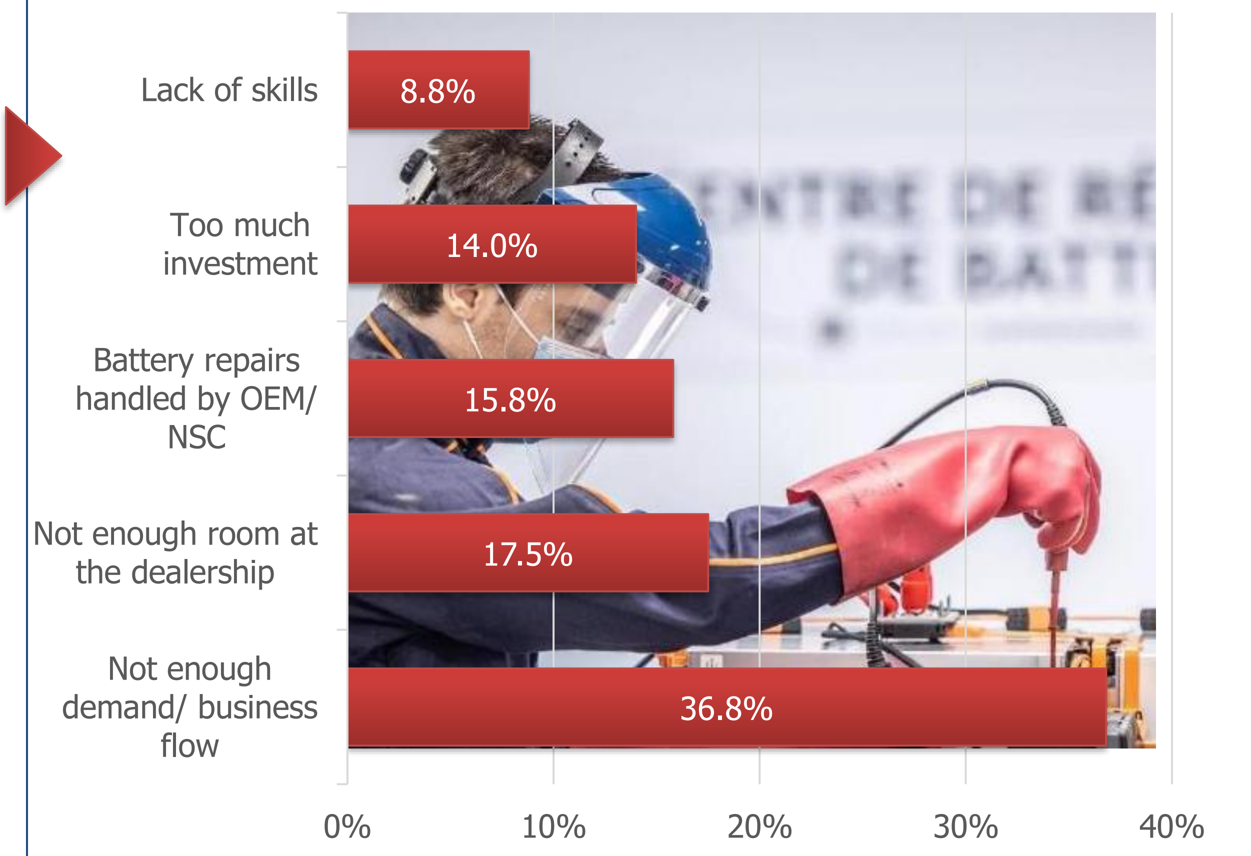
Source: ICDP Nordic dealer survey 2025; n = 180. * Average for 4 markets of dealers answering ‘No, we do not offer this service and do not plan to do so’

The survey revealed a mixed picture of battery repair centres. 53% of Norwegian dealers operate one, but only 13% of Danish dealers have taken this step so far. The main obstacle remains a lack of demand

"Do you operate at least one battery repair centre?



Main reasons for not operating battery repair centres*



Source: ICDP Nordic dealer survey 2025; n = 180. * Average for 4 markets of dealers answering 'No, we do not offer this service and do not plan to do so'

Looking at the direction many Norwegian dealers have taken, it appears that a battery repair centre could be a more promising investment than a 24/7 EV charging station

The lowest share for charging stations at dealers …

… And the highest for battery repair centres

The highest share for charging stations at dealers …

… And close to the average for battery repair centres …

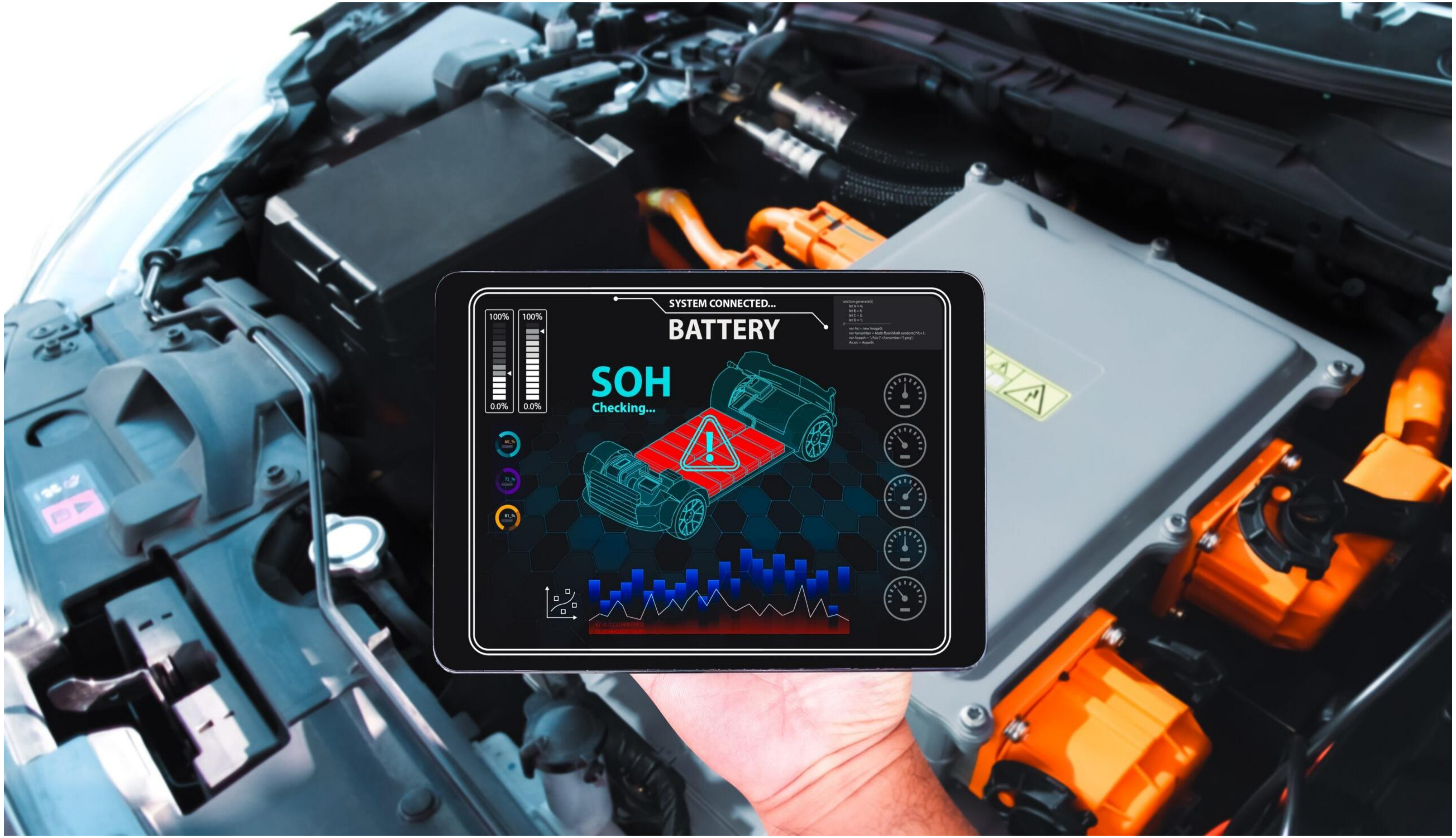
… But the lowest BEV share in the car parc

The lowest share for both charging stations and battery repair centres

Average share for both charging stations and battery repair centres

Source: ICDP

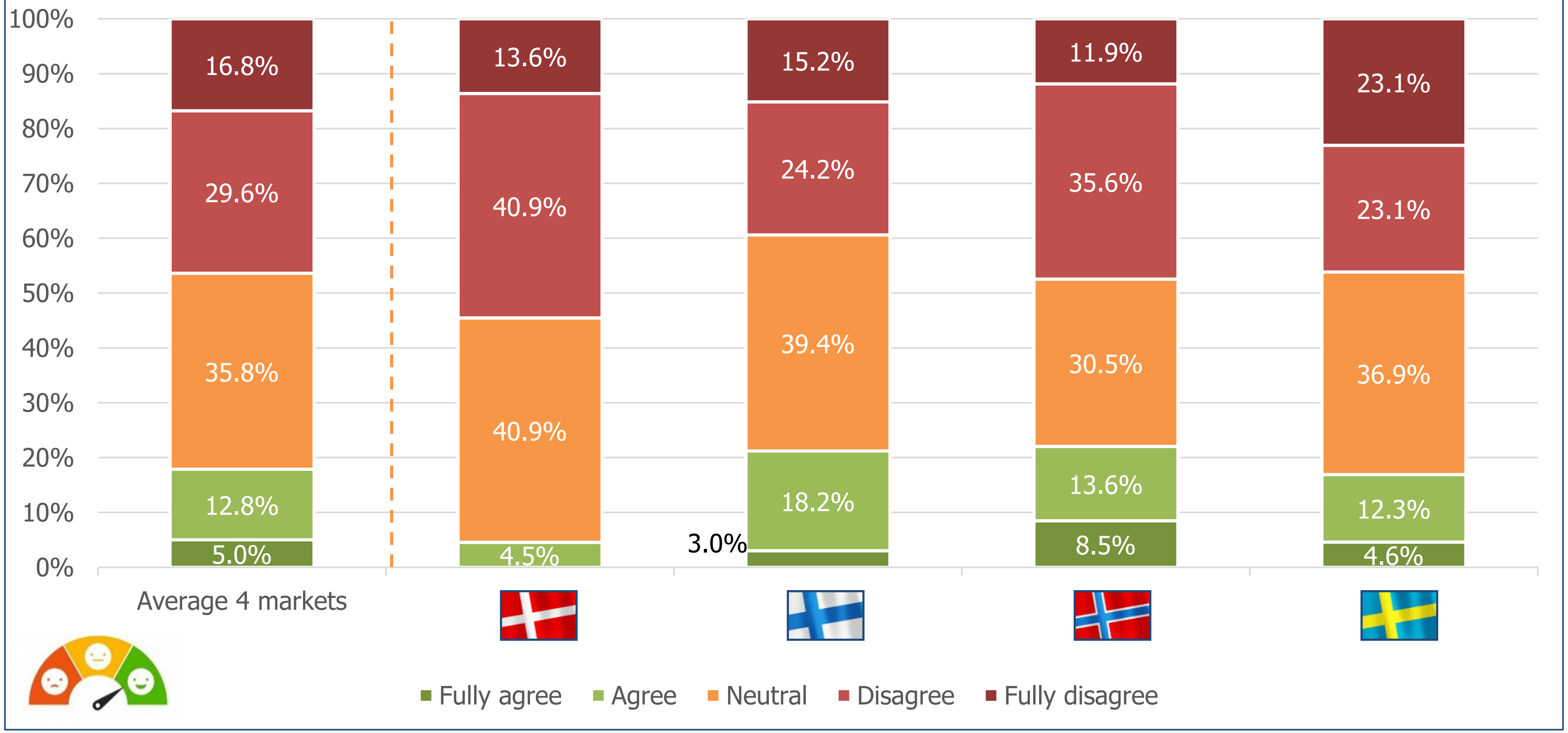
BEVs and additional services – the provision of battery State of Health testing



1.c

So far, only 18% of Nordic dealers felt that BEV customers are asking for SoH testing as part of their regular service. This share varies from 5% in Denmark to 22% in Norway

"As part of a service operation, BEV owners regularly request that a SoH test be carried out on the battery pack



Source: ICDP Nordic dealer survey 2025; n = 179

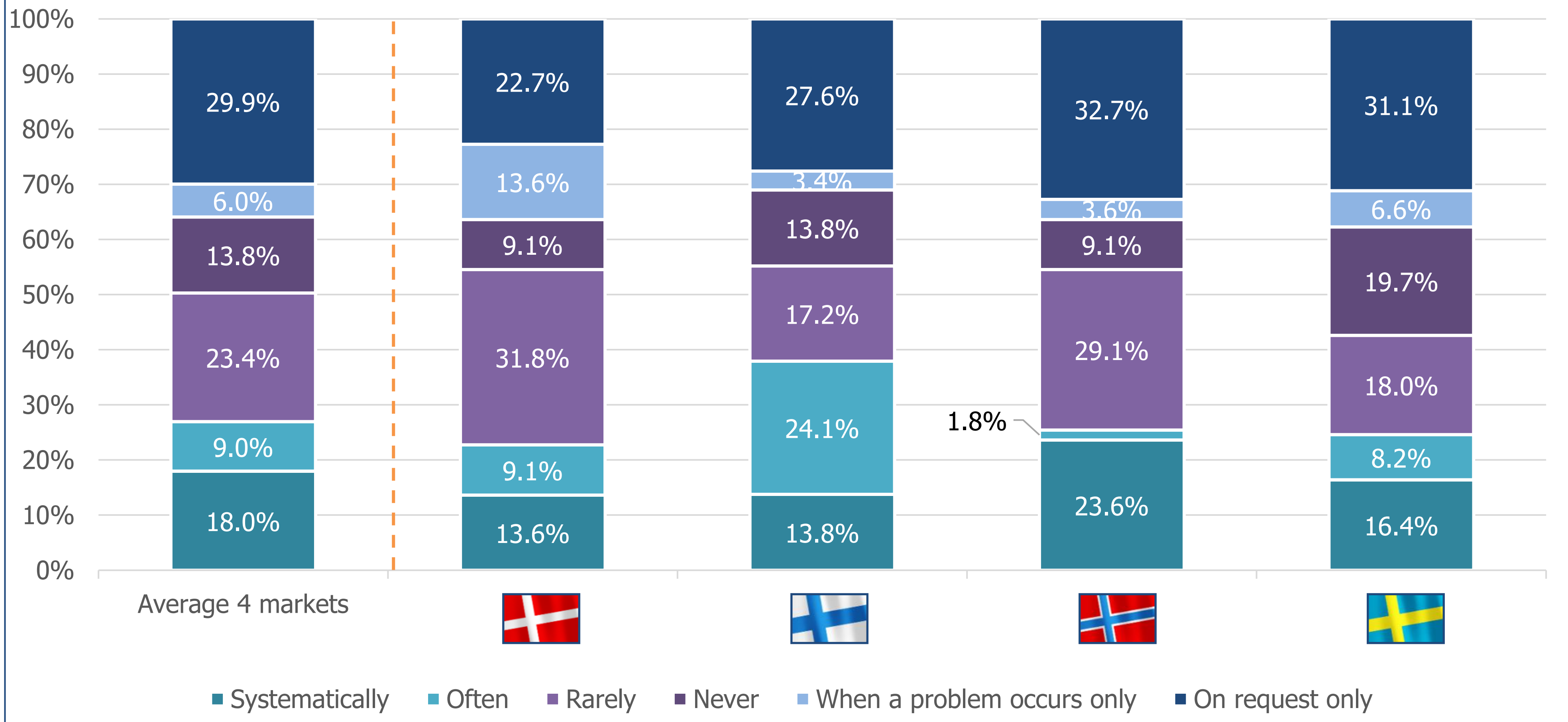
SoH testing

Workshop

Norwegian BEV customers are felt to be the most likely to request a SoH test, although not yet in large numbers. This may be due to battery degradation being lower in practice than many customers (and the sector) initially feared

Only 27% of dealers 'systematically' or 'often' provide a SoH test at a BEV workshop visit, versus 37% 'rarely' or 'never'. 30% only offer it on request. Finnish dealers are the most inclined to offer a test

"How often do you offer a SoH test for BEVs visiting your workshop?



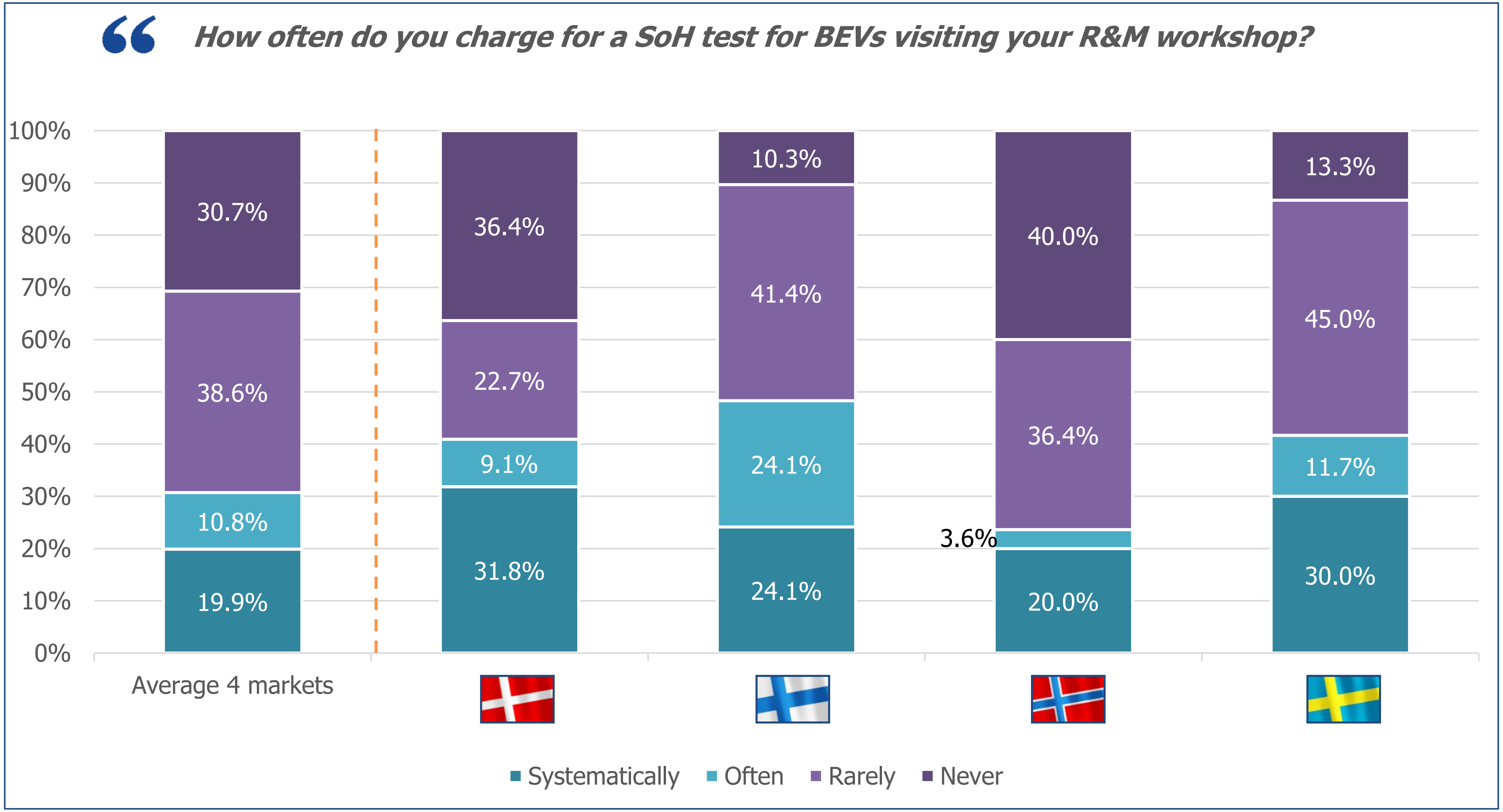
Source: ICDP Nordic dealer survey 2025; n = 167

SoH testing

Workshop

Norwegian dealers are by far the most likely to offer SoH testing 'systematically' to customers, and their low score for 'often' suggests that offering a test is increasingly embedded as an aftersales process

Most Nordic dealers do not usually charge the customer for providing a SoH test at the workshop. In Norway, only 20% of dealers are systematically invoicing for this service



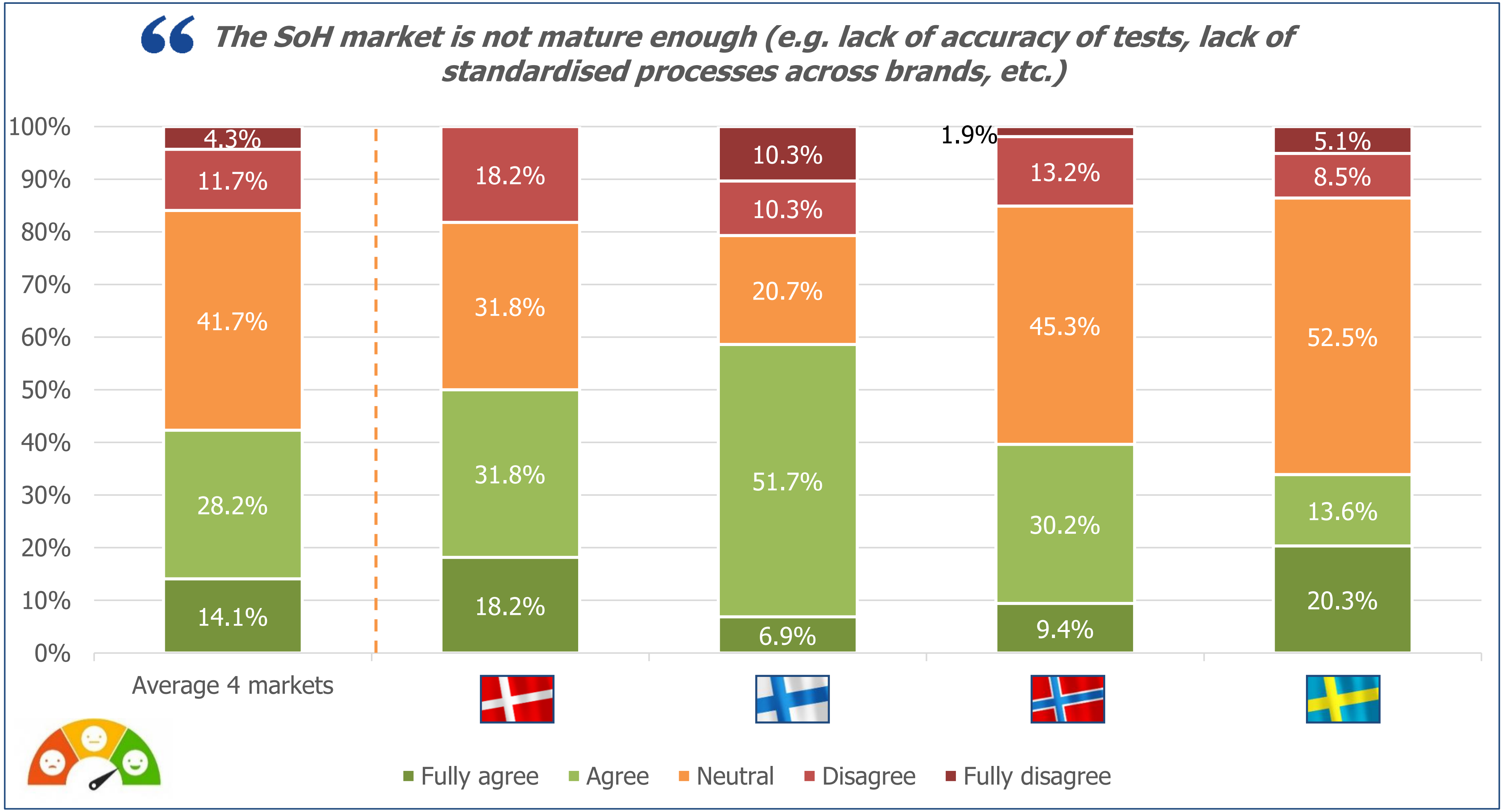
Source: ICDP Nordic dealer survey 2025; n = 166

SoH testing

Workshop

Overall, dealers, including Norwegian dealers, are reluctant to make their BEV customers pay for a SoH test

42% of the respondent dealers felt that the SoH market is 'not yet mature'; 15% disagreed, and 42% had a neutral view. This lack of consensus explains a certain 'wait and see' approach to SoH testing



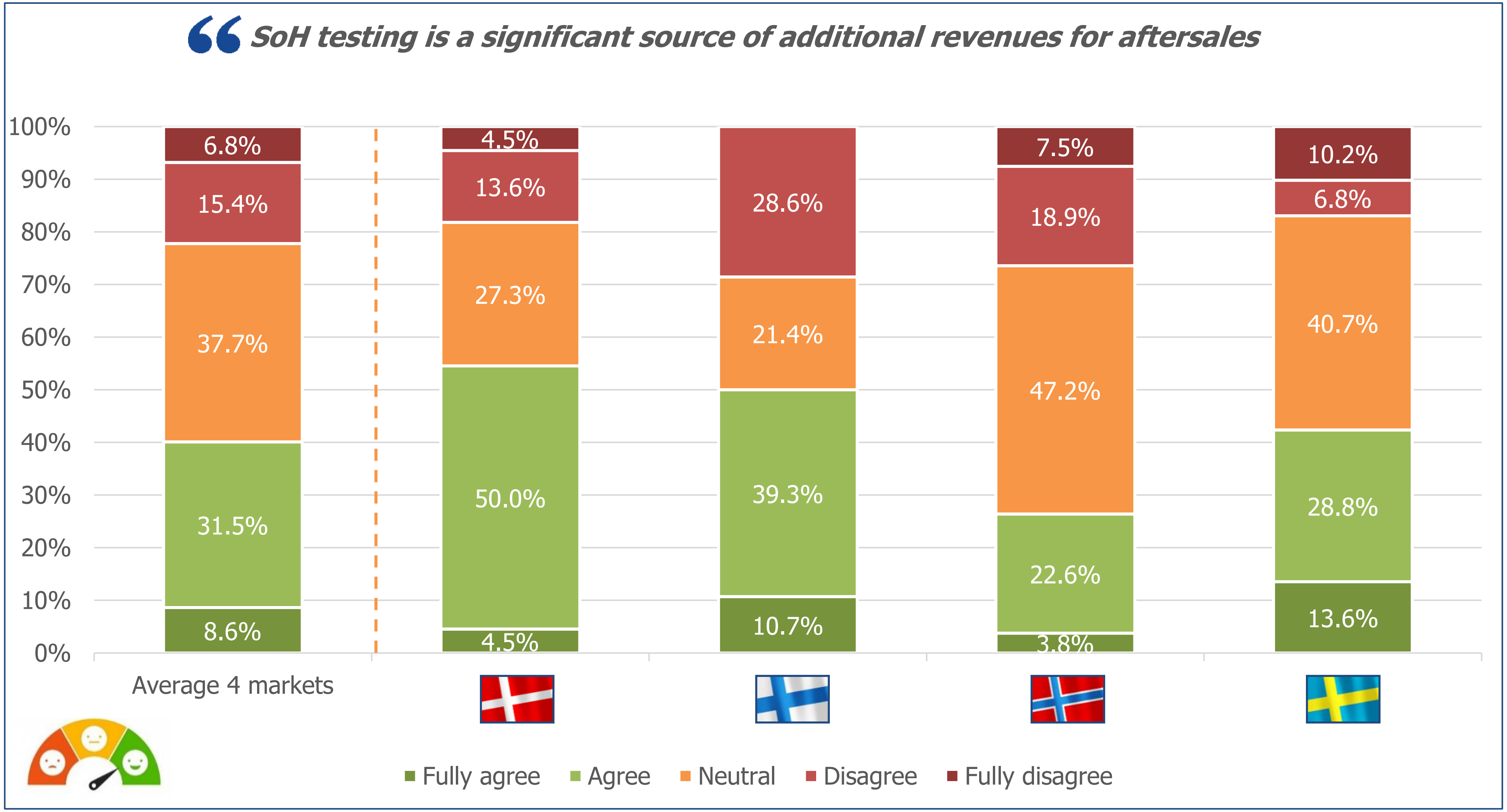
SoH testing

Workshop

The dealers tended to feel that the SoH testing market is not yet mature. Interestingly, this was still the view in the larger Norwegian BEV market

Source: ICDP Nordic dealer survey 2025; n = 163

This view can also be explained by the fact that, currently, 'only' 40% of Nordic dealers see SoH testing as a significant source of profit – ranging from 55% in Denmark down to 26% in Norway



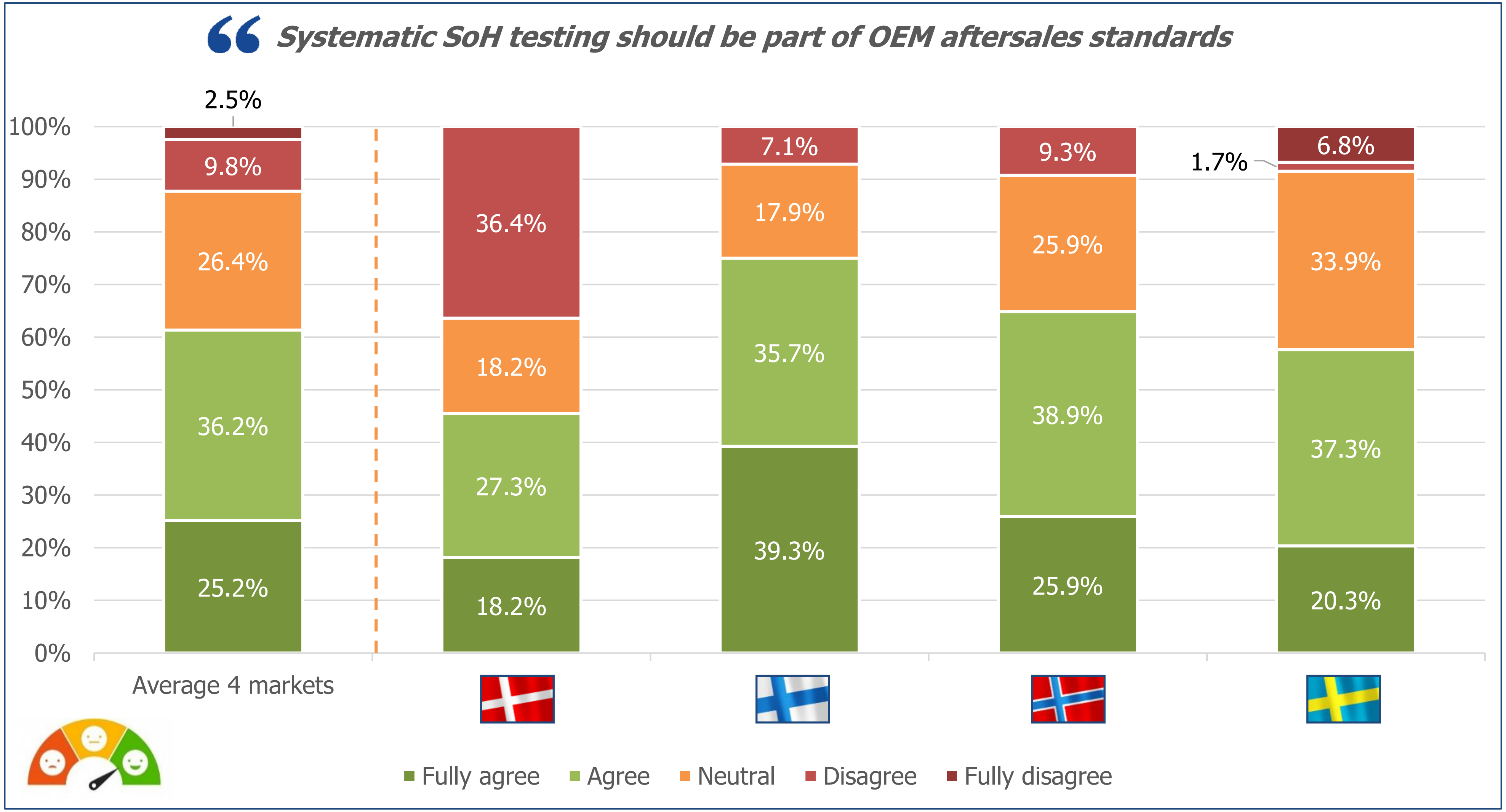
Source: ICDP Nordic dealer survey 2025; n = 162

SoH testing

Workshop

While most Nordic dealers seem to be betting on SoH testing becoming a source of additional aftersales income, their enthusiasm may be dampened by the more pessimistic views of their Norwegian counterparts …

With the exception of Denmark, a majority of dealers felt that the systematic provision of SoH testing should be the responsibility of the car manufacturers



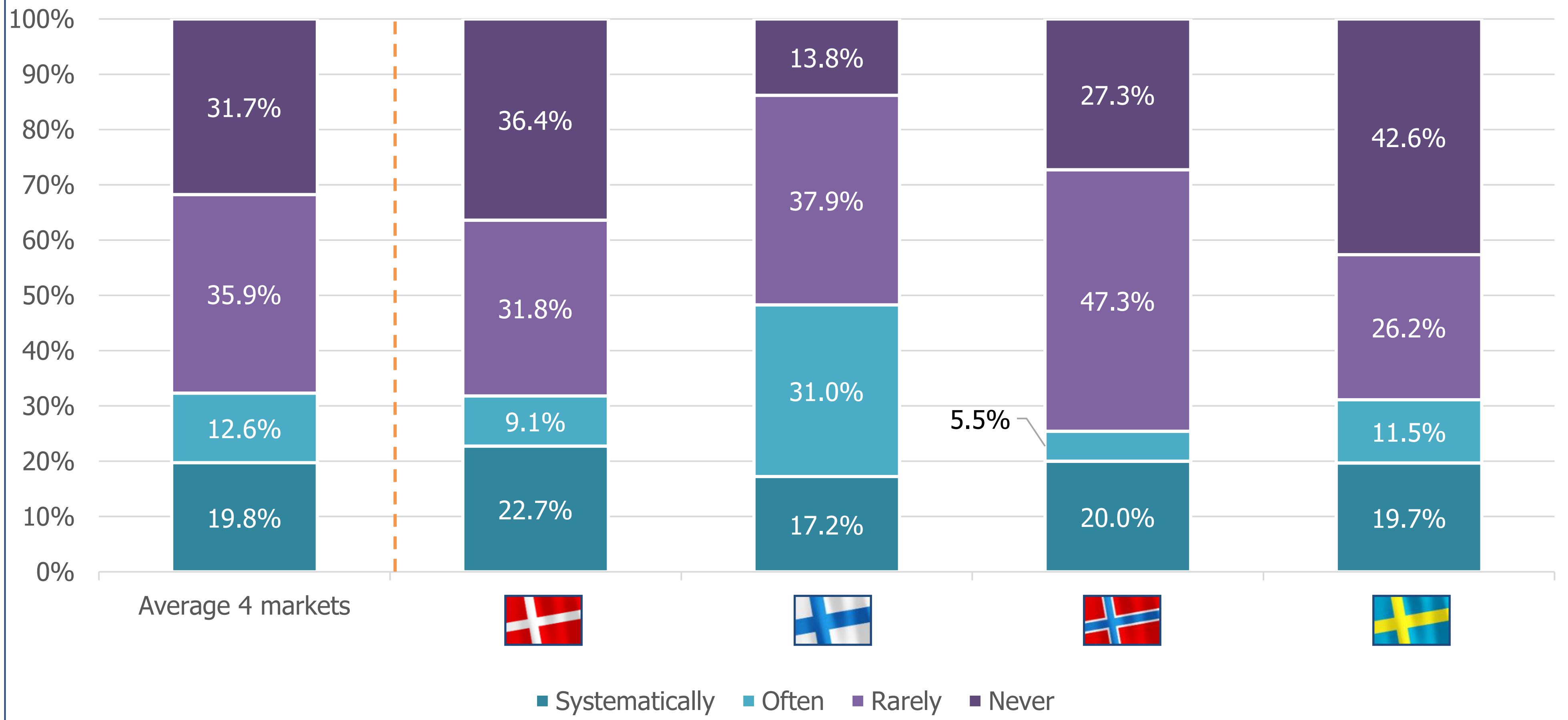
SoH testing

Dealers appear to be more inclined to carry out SoH tests if this process is included in OEM aftersales standards. Are they therefore expecting that the additional SoH testing revenue will come from the OEMs paying them a bonus?

Source: ICDP Nordic dealer survey 2025; n = 163

As with aftersales jobs, Nordic dealers do not usually offer a SoH test when a used BEV is sold. Only around 20% of the respondent dealers do so systematically, although Finland scores above average

How often do you offer a SoH test for used BEVs sold by your dealership?



Source: ICDP Nordic dealer survey 2025; n = 167

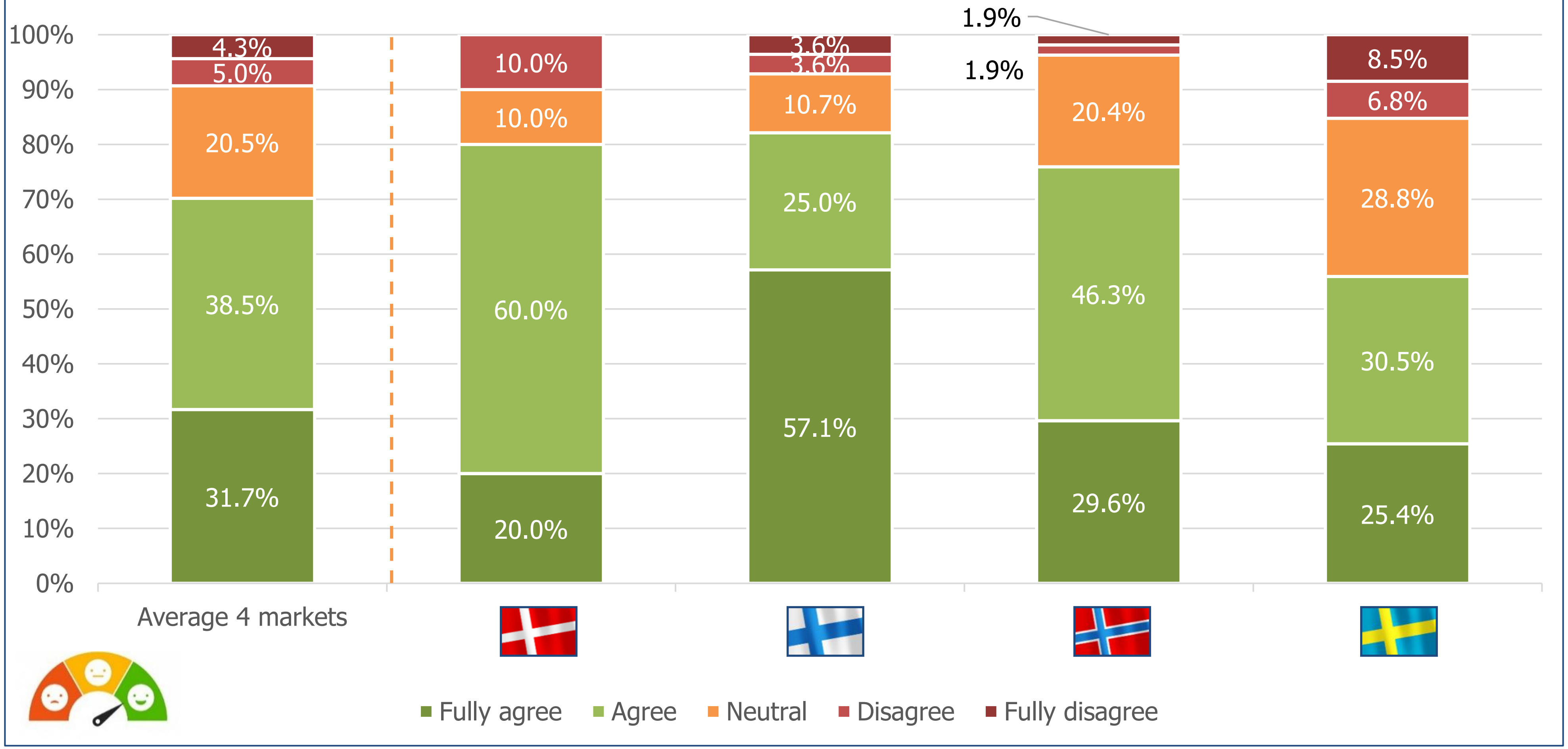
SoH testing

Used BEVs

The share of Norwegian dealers offering SoH testing on used BEVs either 'systematically' or 'often' is the lowest of the sample. Is this a foretaste of what will happen in the other Nordic markets as dealers' used BEV sales grow?

In Denmark, Finland and Norway, more than 3/4th of the dealers felt that a SoH test should be carried out prior to the resale of a used BEV. This proportion was down to 56% in Sweden

"A SoH test should be systematically carried out as part of the reconditioning process of a used BEV



Source: ICDP Nordic dealer survey 2025; n = 161

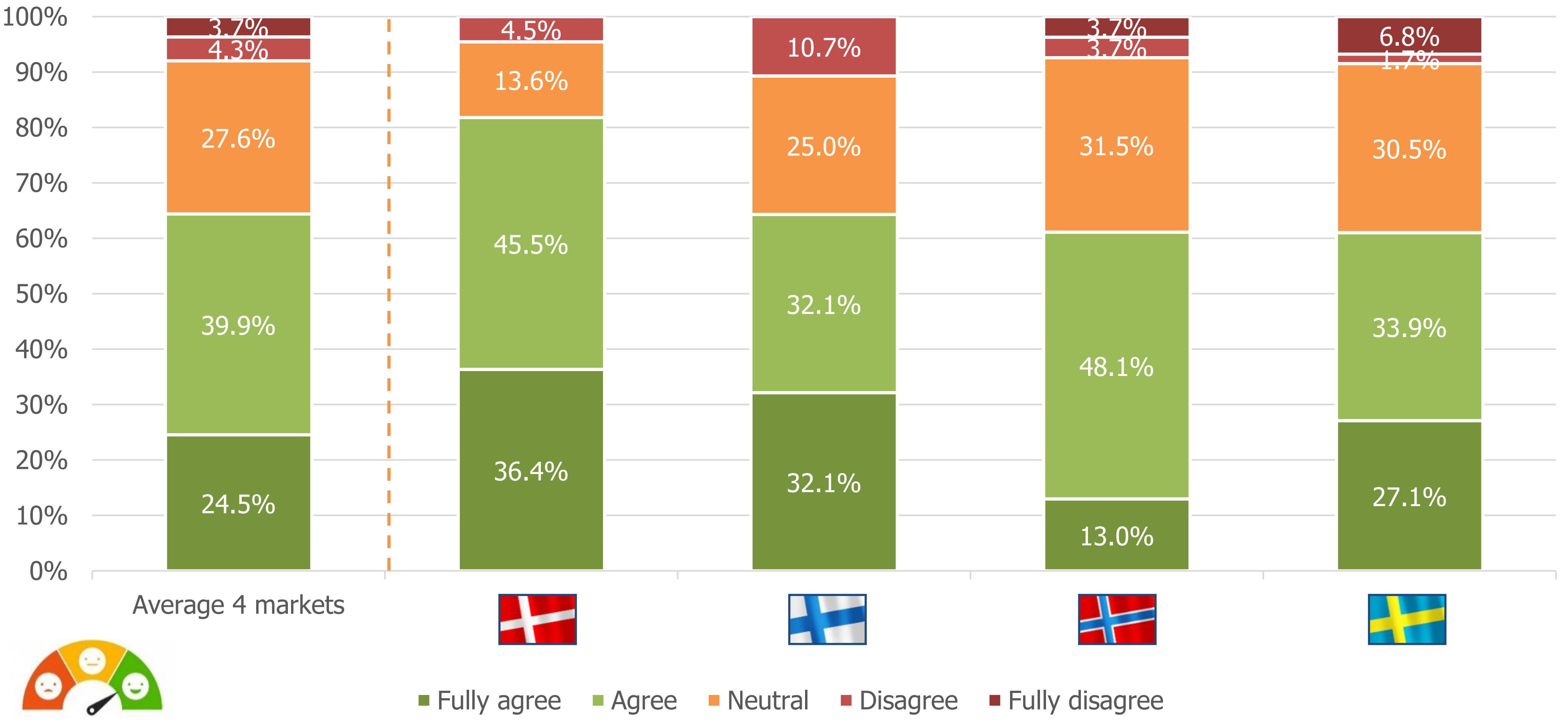
SoH testing

Used BEVs

However, and in contrast to the message on the previous slide, most dealers agreed that SoH testing should be carried out systematically as part of used BEV refurbishment … even though many are not yet doing it …

The dealers had a stronger positive feeling about the impact of a SoH 'certificate' on used BEV prices. More than 60% (and up to 80% in Denmark) viewed a good test result as a positive pricing 'lever'

" ***A trusted SoH 'certificate' enables used BEVs to be sold at a higher price***



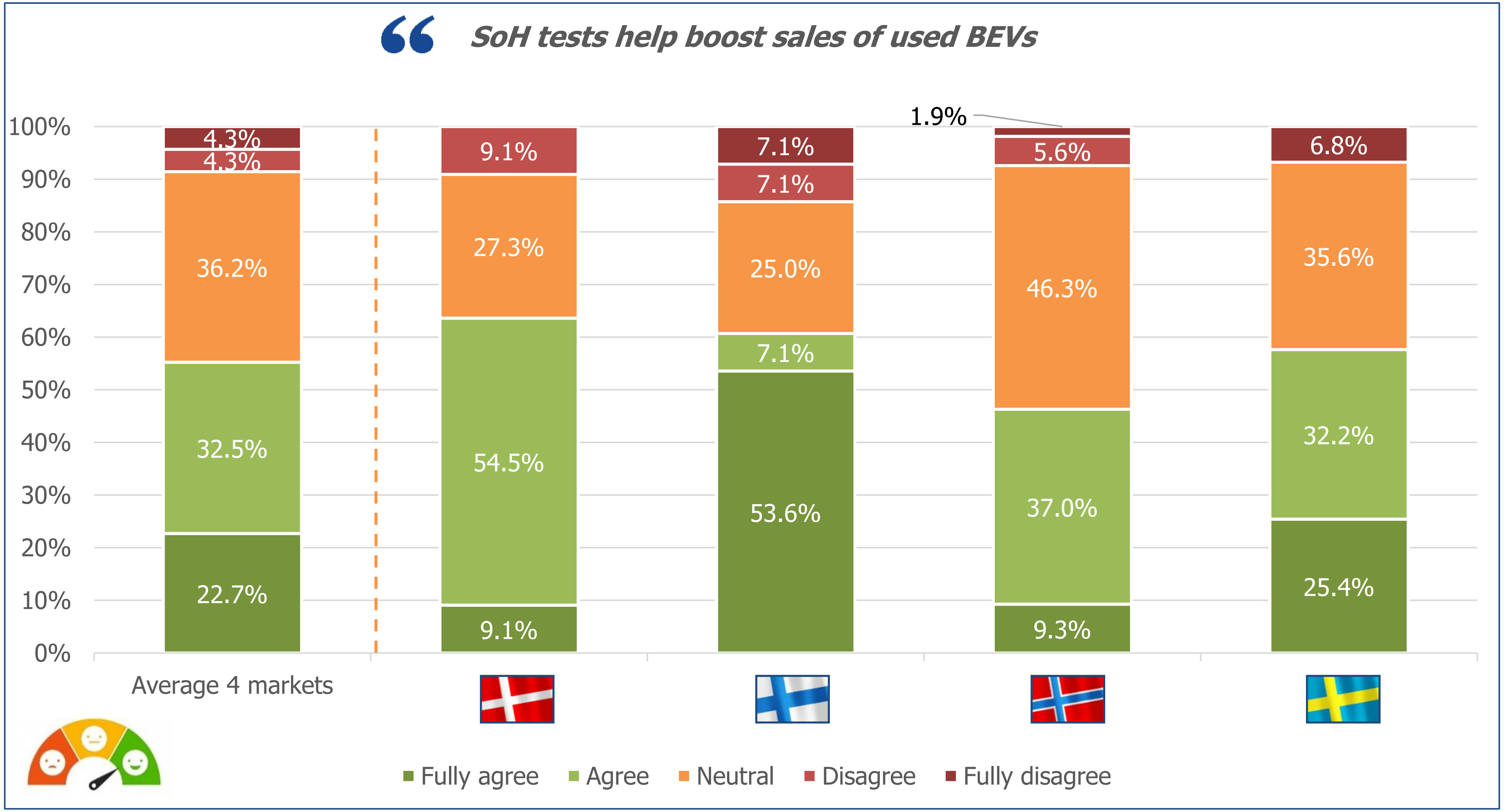
SoH testing

Used BEVs

Clearly, the SoH test and resulting 'certificate' is seen by most dealers as a good 'lever' to help them sell a used BEV at a higher price

Source: ICDP Nordic dealer survey 2025; n = 163

55% of the Nordic dealers felt that the provision of SoH testing is already boosting the sales of used BEVs. However, 'only' 46% of Norwegian dealers agreed, and the same proportion were 'neutral'



Source: ICDP Nordic dealer survey 2025; n = 163

SoH testing

Used BEVs

The dealers were also reasonably convinced that SoH testing is helping to drive actual used BEV sales, although arguably to a lesser extent than it is supporting used BEV pricing

High voltage battery State of Health testing: is it an untapped business opportunity?

Workshop

- Only 1 dealer in 5 believes that BEV customers are asking for SoH testing at their regular service
- As a result, 3 out of 4 dealers are not seeking to impose SoH testing as a basic service operation
  - Moreover, when they do carry out a test, the dealers rarely charge for it
- More than 40% of dealers do not tap this opportunity, complaining that this market segment is not mature enough (i.e. lack of accuracy of tests, lack of standardised processes across brands)
  - Only 4 dealers out of 10 see it as a potential additional source of revenue
- In fact, many dealers are waiting for their OEMs to take the lead, to promote the benefits of SoH testing to customers, and to incorporate testing into their aftersales standards
  - And if testing is part of the aftersales standards, dealers are hoping that it will be 'bonused' …
- Finally, it is interesting that Norwegian dealers do not value SoH as highly as might be expected
  - Are they finding that the batteries are simply more reliable and slower to degrade than the whole sector assumed, and so SoH testing is less needed?

Used BEVs

- Points of view differ when it comes to SoH testing for used BEVs
  - More than half of the dealers felt that SoH can help them to sell more used BEVs, and at a higher price
- However, when it comes to implementing the process, dealers are much more reluctant
  - Are they also waiting for OEMs to 'get the ball rolling' (e.g. by including SoH within approved used car schemes)?

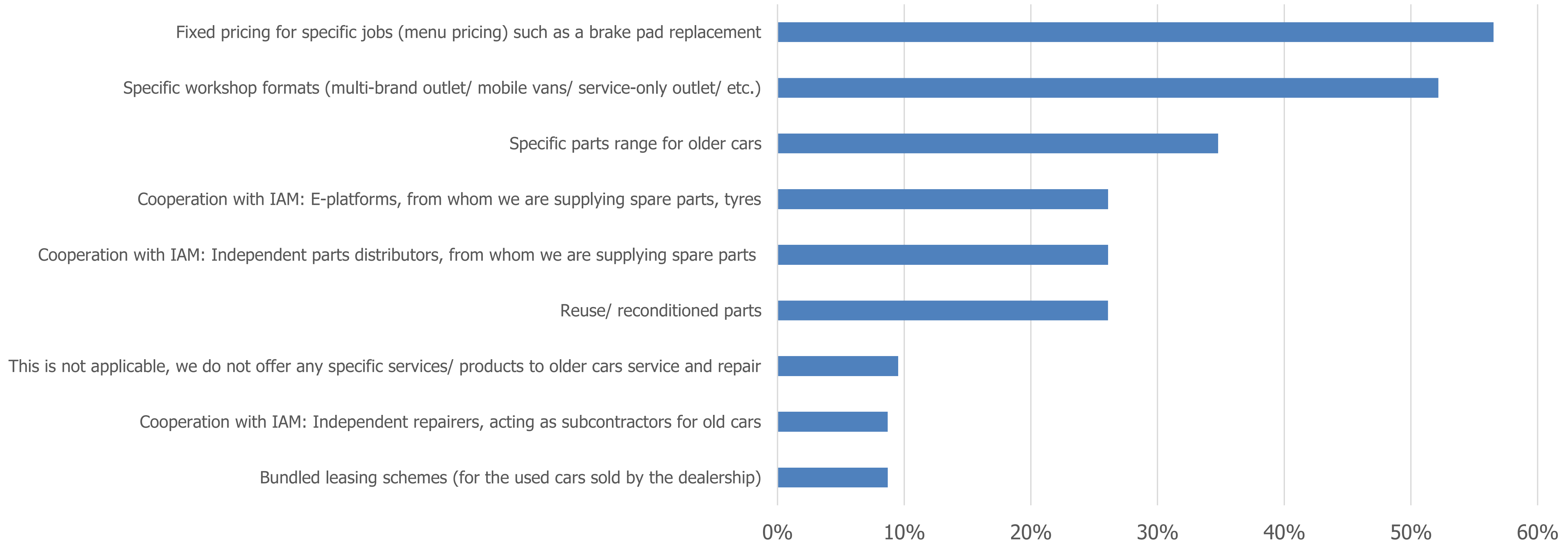
Source: ICDP

Focus on older cars – strategies implemented by dealers to attract and retain customers owning ‘older’ cars

2

In Denmark, the 3 main ‘levers’ used by dealers to attract and retain old car owners are: menu pricing for defined jobs, specific workshop formats, and dedicated parts ranges for older cars

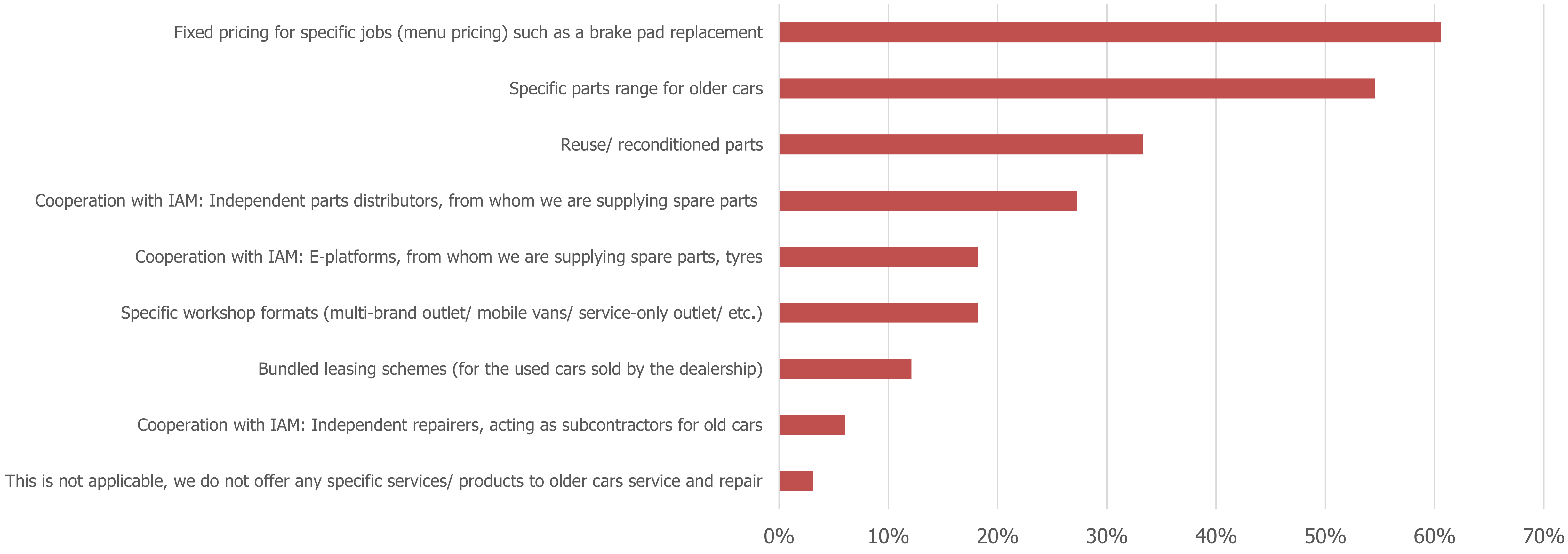
What aftersales strategies have you implemented (or plan to implement) to attract and retain older car customers?



Source: ICDP Nordic dealer survey 2025; n = 23

To a certain extent, Finnish dealers are following the same strategies as their Danish counterparts, but reused and reconditioned parts for older cars are implemented more widely

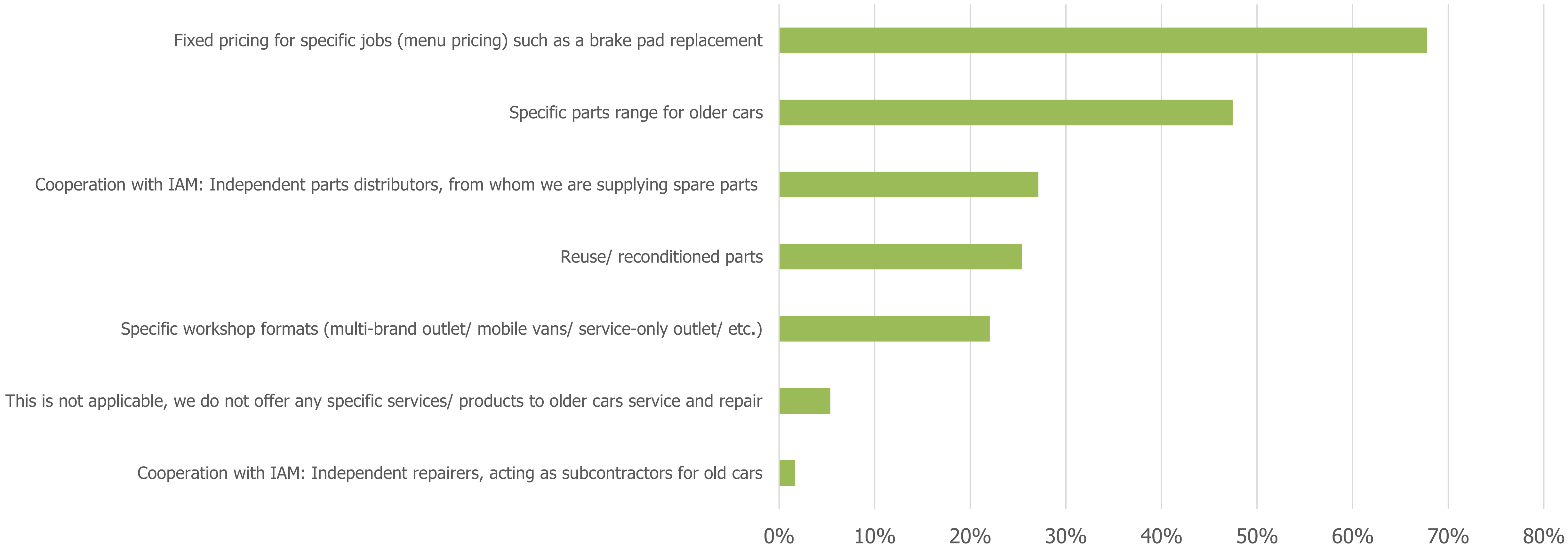
What aftersales strategies have you implemented (or plan to implement) to attract and retain older car customers?



Source: ICDP Nordic dealer survey 2025; n = 33

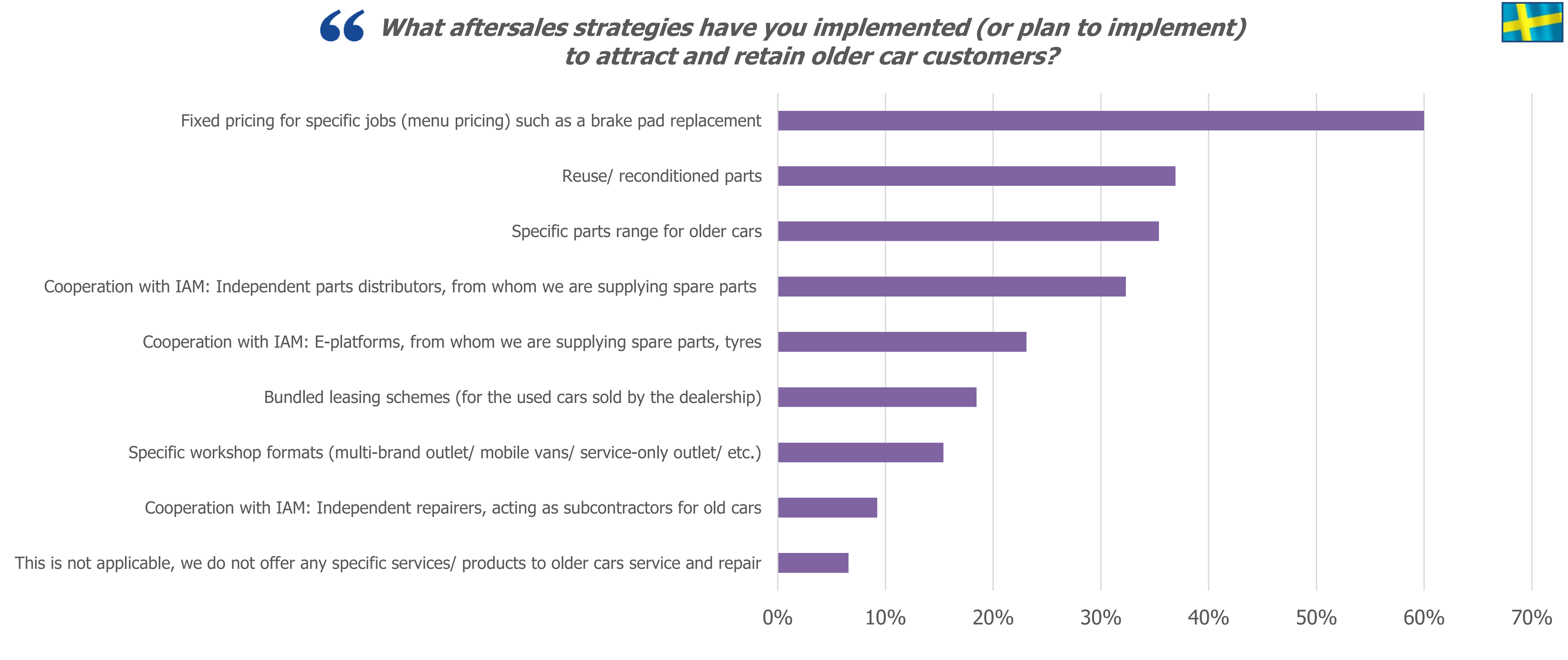
In Norway, the 2 main strategies for covering the older car parc are similar to those used in Denmark and Finland, but Norwegian dealers are also cooperating with independent spare parts distributors

What aftersales strategies have you implemented (or plan to implement) to attract and retain older car customers?



Source: ICDP Nordic dealer survey 2025; n = 59. NB: The levers ‘bundled leasing schemes’ and ‘cooperation with IAM e-platforms’ were not covered in the Norwegian survey

Finally, Swedish dealers also use fixed menu pricing and specific parts ranges to cover older cars. Local rules for re-used parts (Vagnskadegaranti) also encourage dealers to use this 'lever'



Source: ICDP Nordic dealer survey 2025 ; n = 65

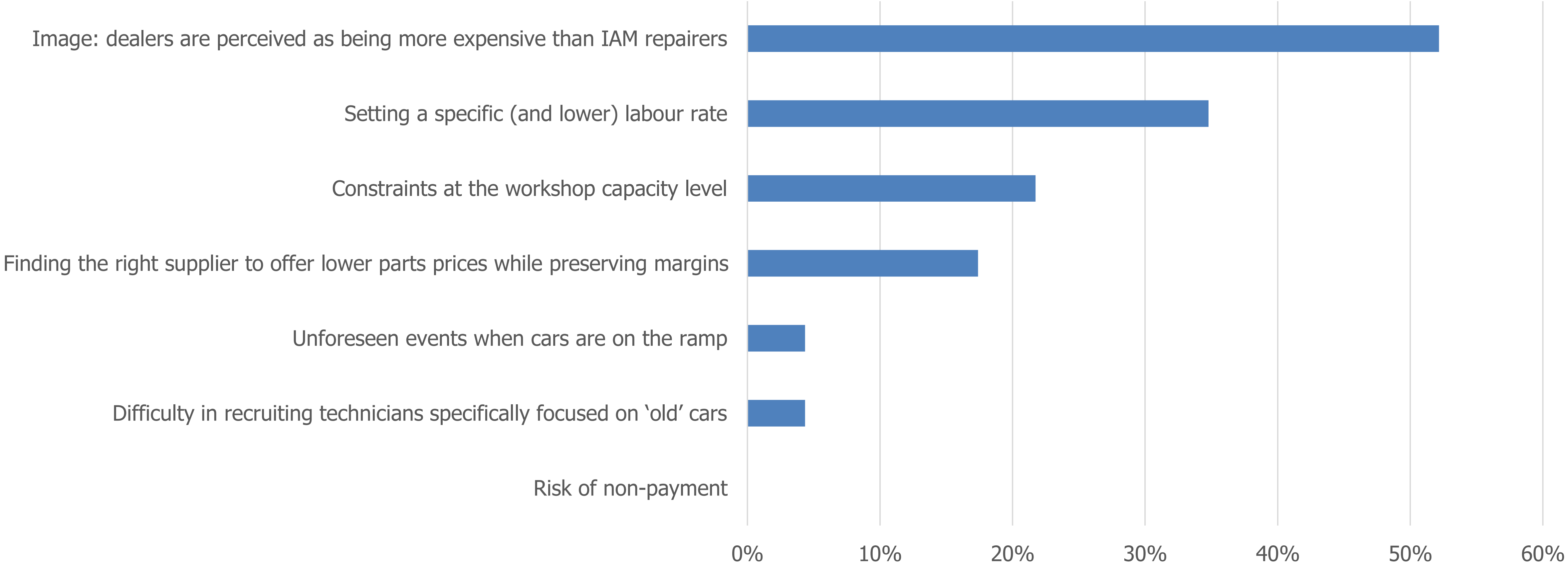
In the minds of dealers, the recipe for attracting the older car parc consists of mixing three main ingredients …

Menu pricing	▶	Ranked lever #1 in all 4 markets
Specific parts ranges for older cars	▶	On the podium in all 4 markets
Reused and reconditioned spare parts	▶	On the podium in 2 markets

Source: ICDP

For Danish dealers, the biggest obstacles to having attractive service offers for older car customers are their image as a dealer, and difficulty in lowering lower labour rates. Workshop capacity came 3rd

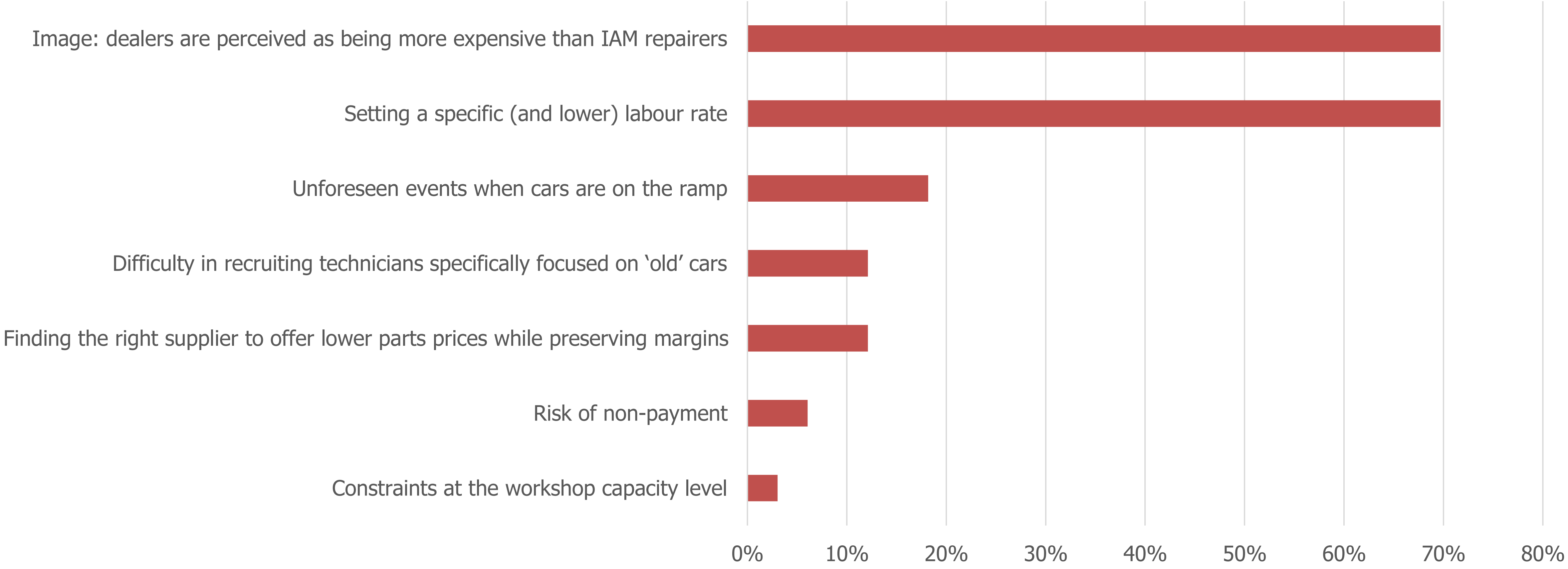
What are the main obstacles to implementing attractive in-house aftersales service offerings for older cars?



Source: ICDP Nordic dealer survey 2025; n = 23

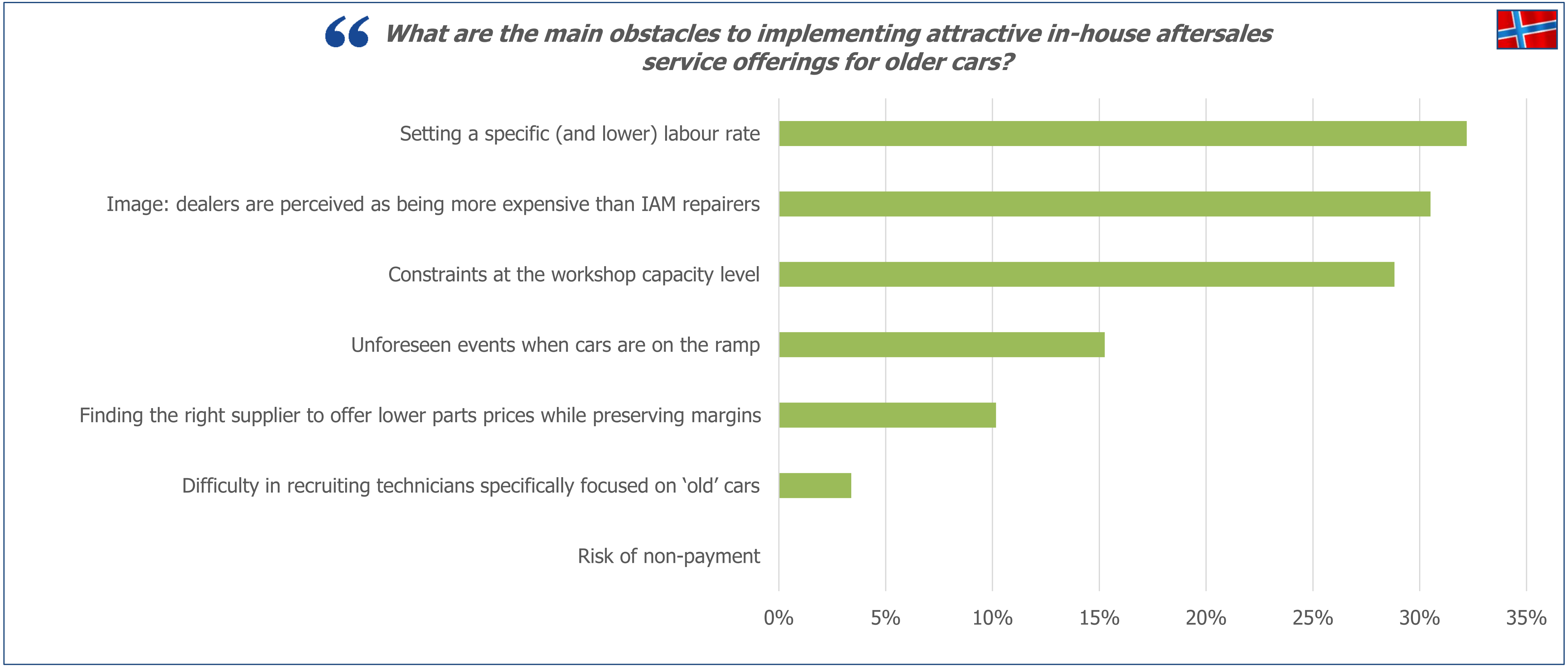
The same main barriers were mentioned by Finnish dealers, whilst 'unforeseen events when cars are on the ramp' (probably due to their age or condition) was also a (more limited) source of concern

What are the main obstacles to implementing attractive in-house aftersales service offerings for older cars?



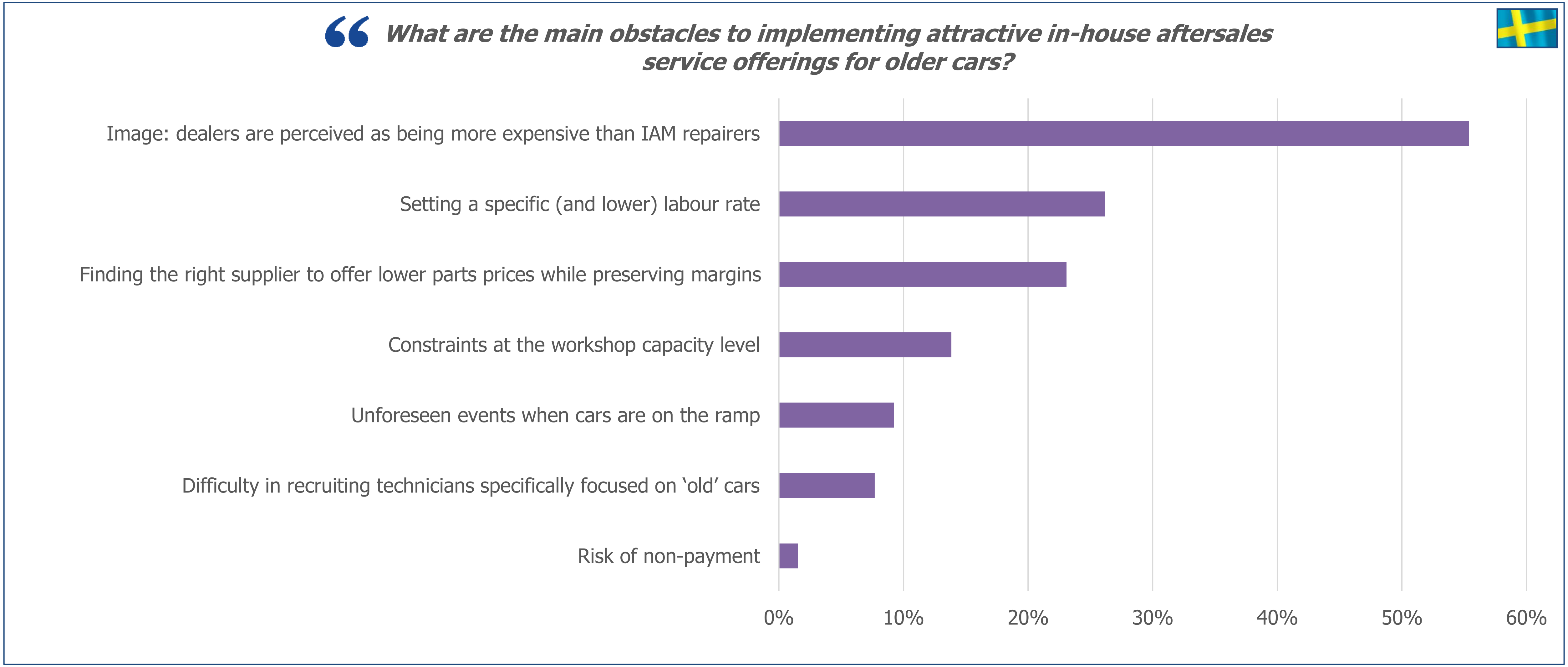
Source: ICDP Nordic dealer survey 2025; n = 33

In Norway, the main difficulties to overcome in attracting people who drive older cars to dealer workshops are similar to the ones expressed in Denmark



Source: ICDP Nordic dealer survey 2025; n = 59

Image problems and the difficulty in adapting labour rates for older cars were also mentioned by Swedish dealers, along with the challenge of finding the right source of affordable spare parts



Source: ICDP Nordic dealer survey 2025; n = 65

In the minds of dealers, the recipe for attracting the older car parc consists of mixing three main ingredients … but two major problems need to be solved before the dish can be served …

Menu pricing

Specific parts ranges for older cars

Reused and reconditioned spare parts

Dealer’s image

Both obstacles are ranked #1 or #2 in all 4 markets

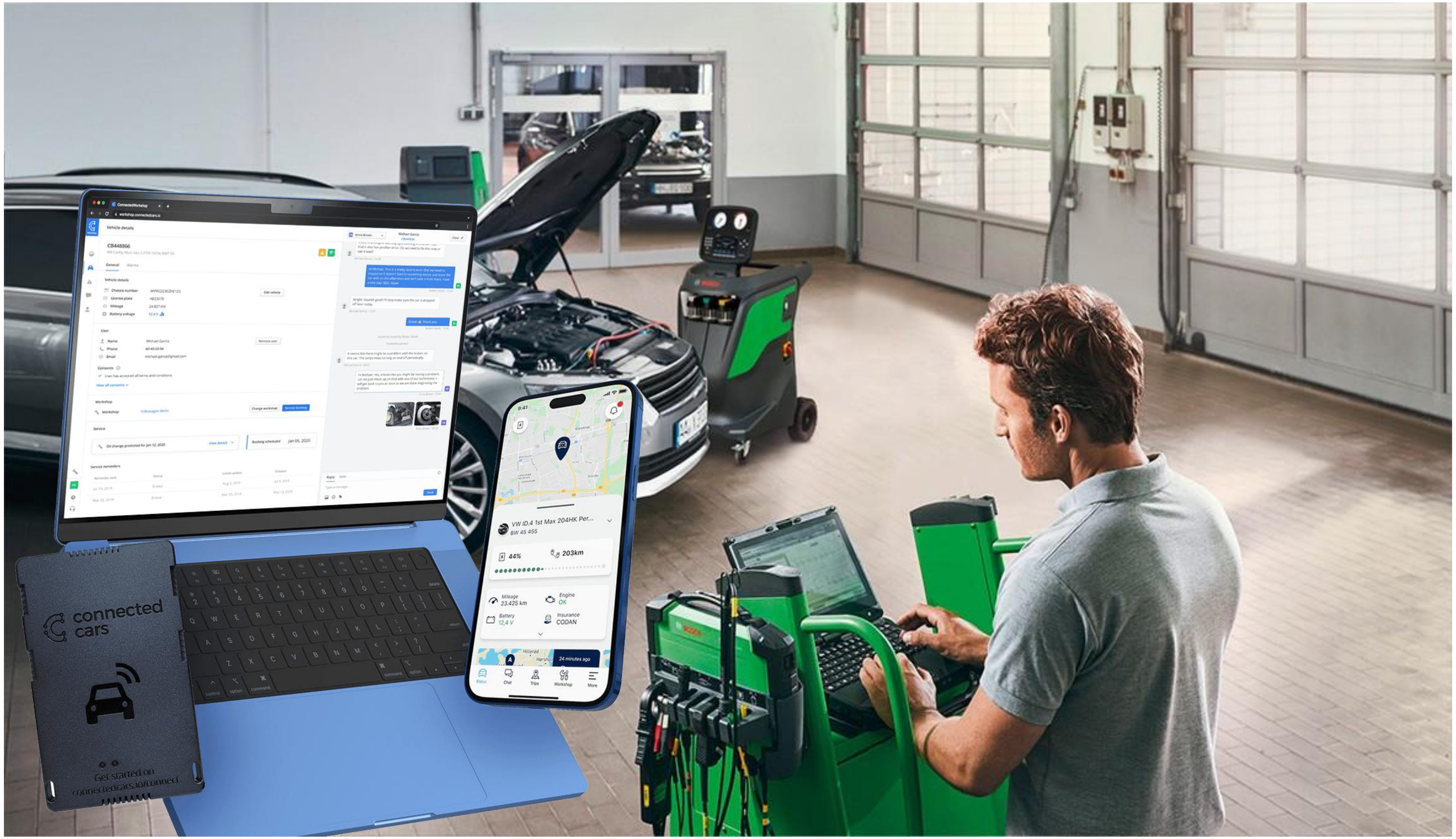
Specific (and lower) labour rate

Source: ICDP

Car connectivity and digitalisation – the current and future impact of connected vehicles on dealers' aftersales activities, plus current use of OtA (Over the Air) technology

3

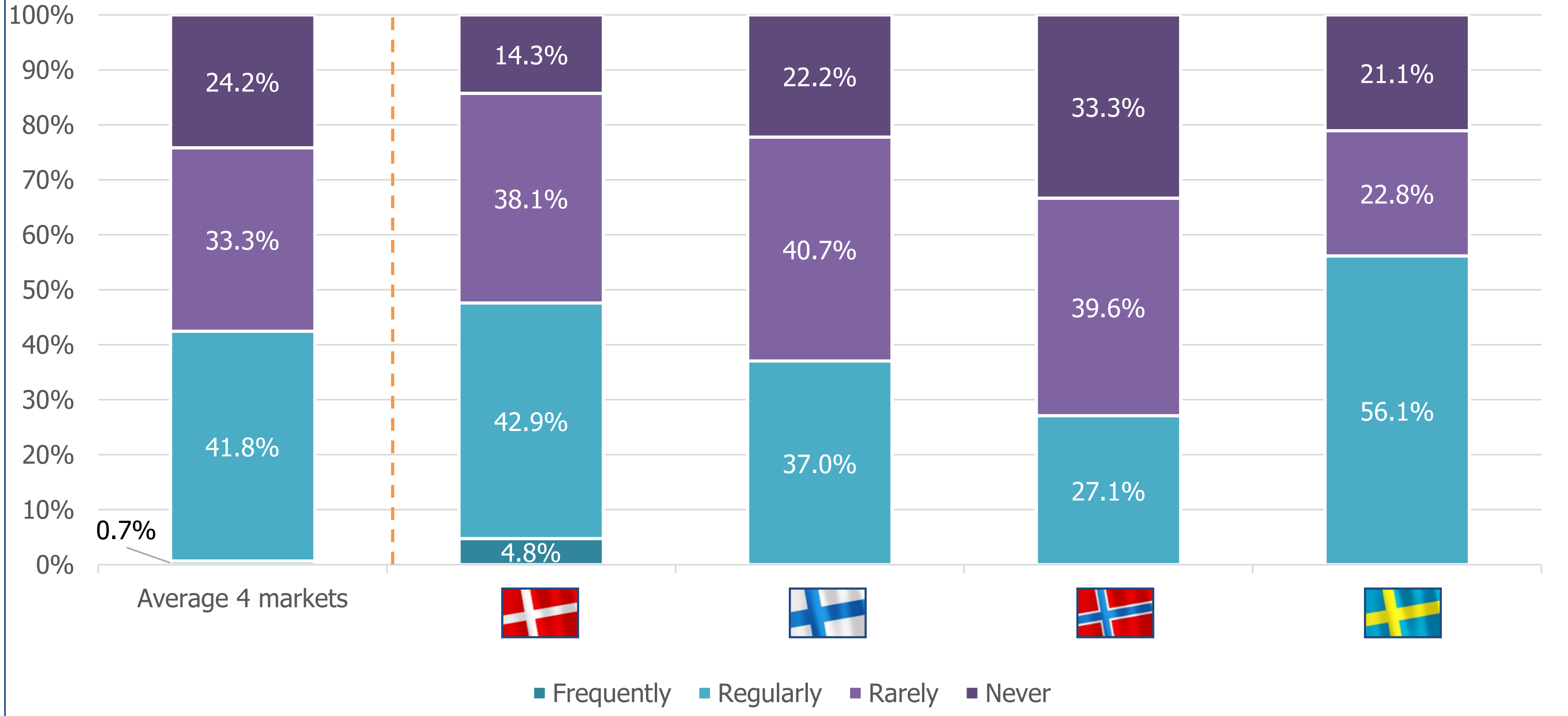
Car connectivity – the current and future impact of connected vehicles on dealers' aftersales activities



3.a

Despite the high number of connected cars on the roads, on average 58% of Nordic dealers stated that they ‘rarely’ or ‘never’ carry out service jobs ‘directly reported’ through connectivity in the car

“ How often do you carry out operations that have been reported directly to your workshop by a connected car?



Connected cars

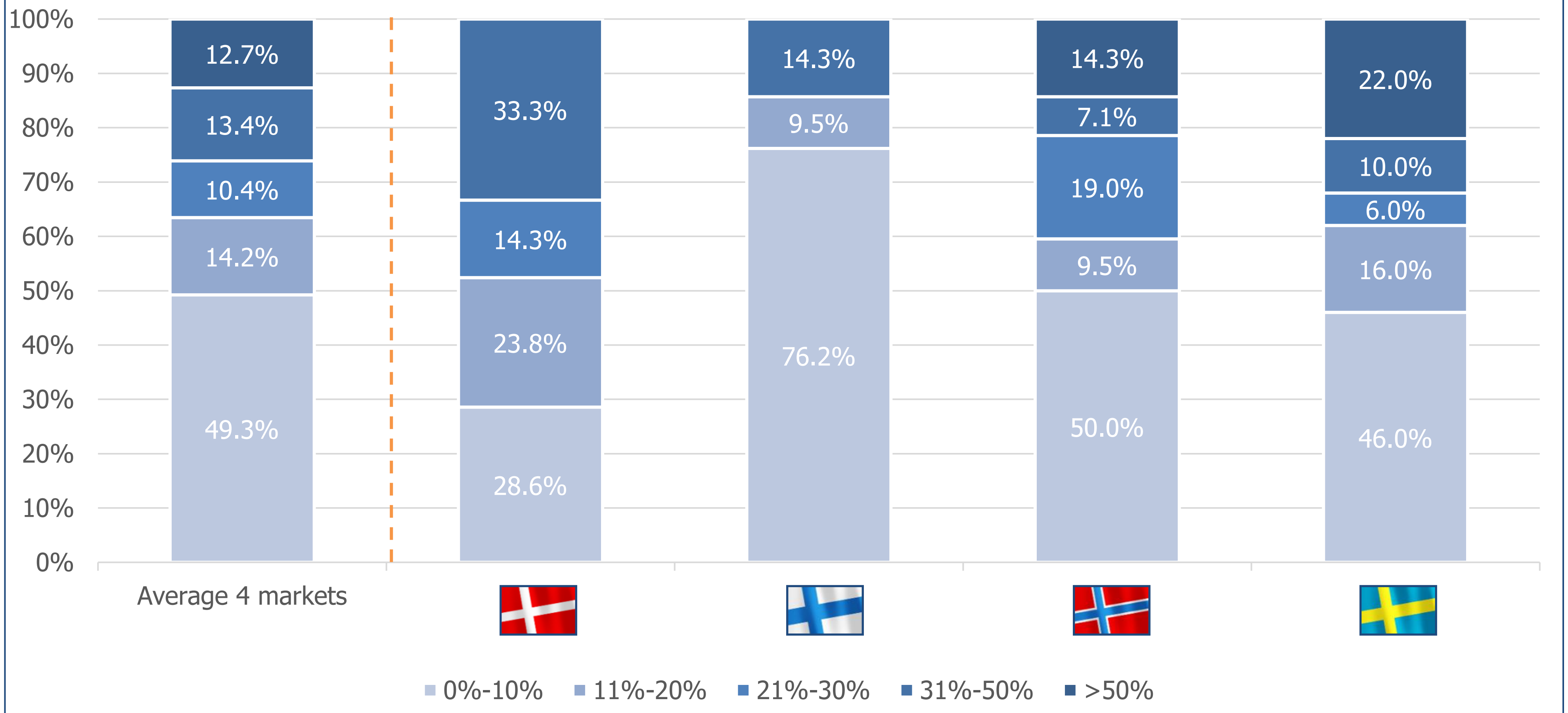
Workshop

The highest share of dealers **never** dealing with operations reported by connected cars is in Norway. This is rather counter-intuitive given the share of BEVs in the market, most of which, as recent cars, will be connected

Source: ICDP Nordic dealer survey 2025; n = 153

The majority of dealers reported that the share of jobs being 'booked directly' by connected cars does not exceed 20%. 86% of Finnish dealers thought this was the case, versus 53% of Danish dealers

"Out of 100 vehicles visiting your workshop, what proportion were directly connected to the workshop DMS to book an appointment?



Source: ICDP Nordic dealer survey 2025; n = 134

Connected cars

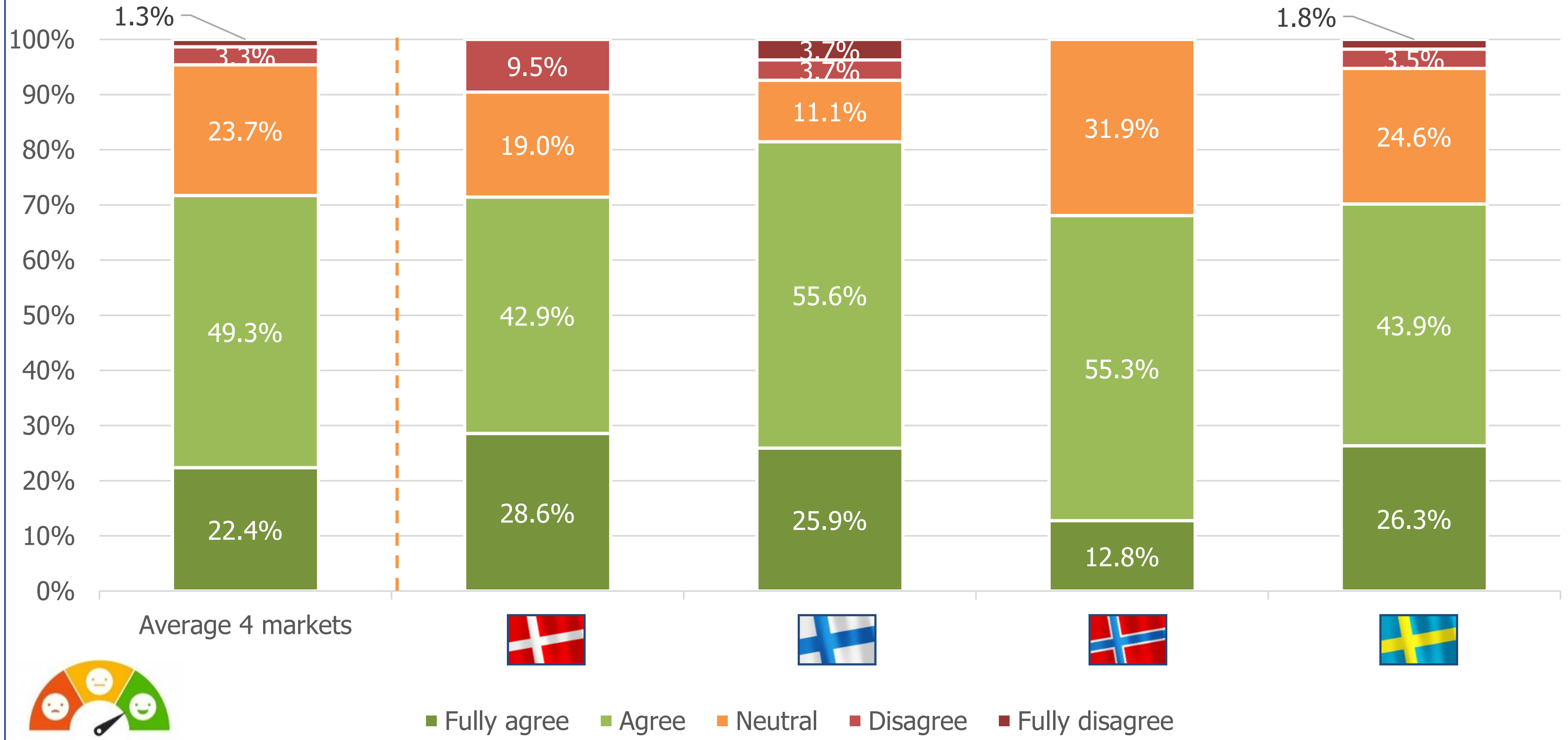
Workshop

The share of cars being directly connected to the WMS is low (<20%). The Danish and Finnish data echo the age structure of their respective passenger car parcs

	0-5 years old	6+ years old
	28.8%	71.2%
	18.5%	81.5%

Despite the varying work flows currently being directed to workshops by connected cars, dealers generally expect these operations to represent a major source of revenue in the future …

"Operations reported by connected cars will definitely become a major alternative source of revenues for dealers



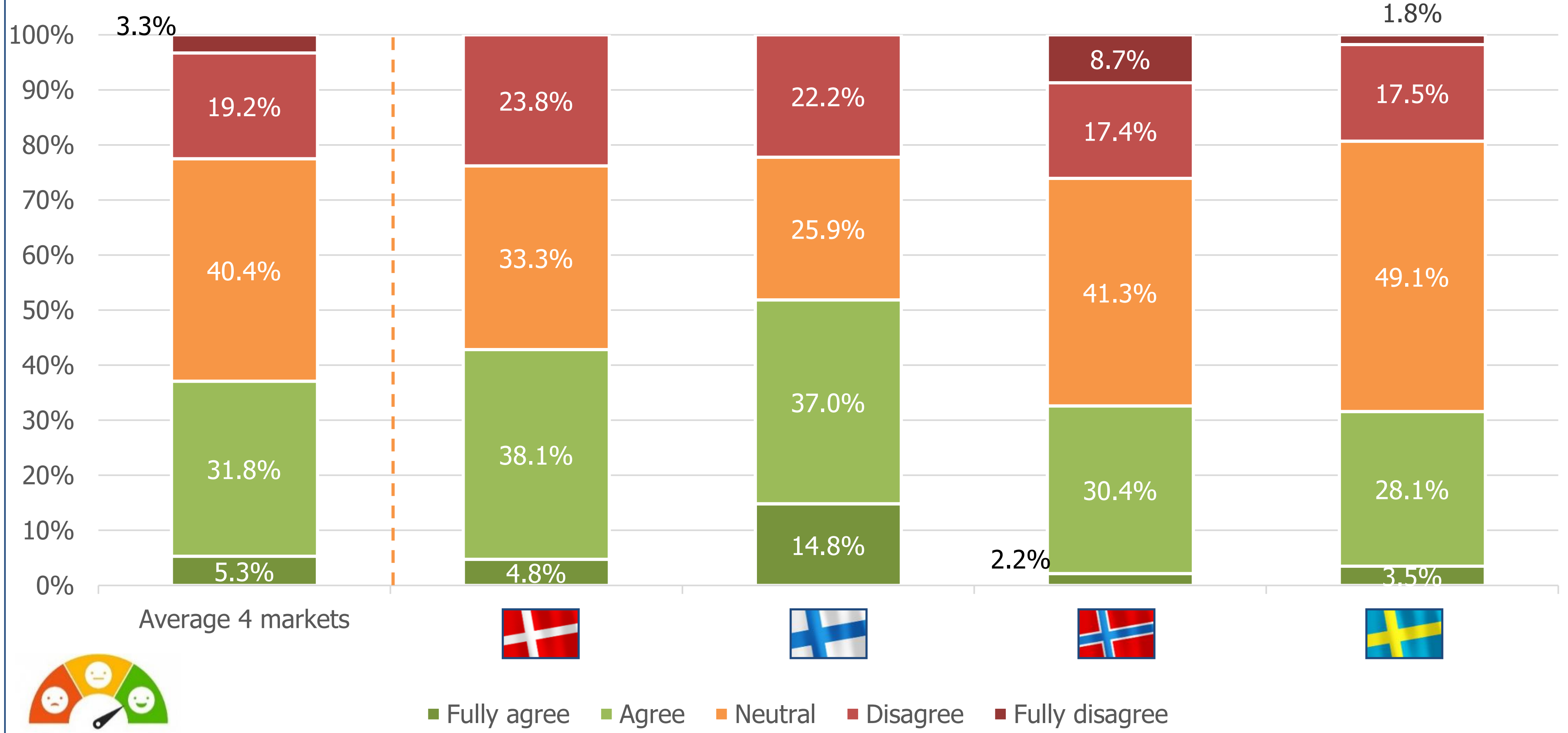
Connected cars

There is an even split between the 4 markets, although Norwegian dealers seem a little less convinced than their counterparts in other markets that connected cars will become a major alternative source of aftersales revenues

Source: ICDP Nordic dealer survey 2025; n = 152

… However, a good proportion of the dealers fear that at least part of the revenues generated by connected cars will end up in the hands of the OEMs

"Most of the revenues generated by operations reported by connected cars will remain in OEM hands with low impact on the dealer aftersales business



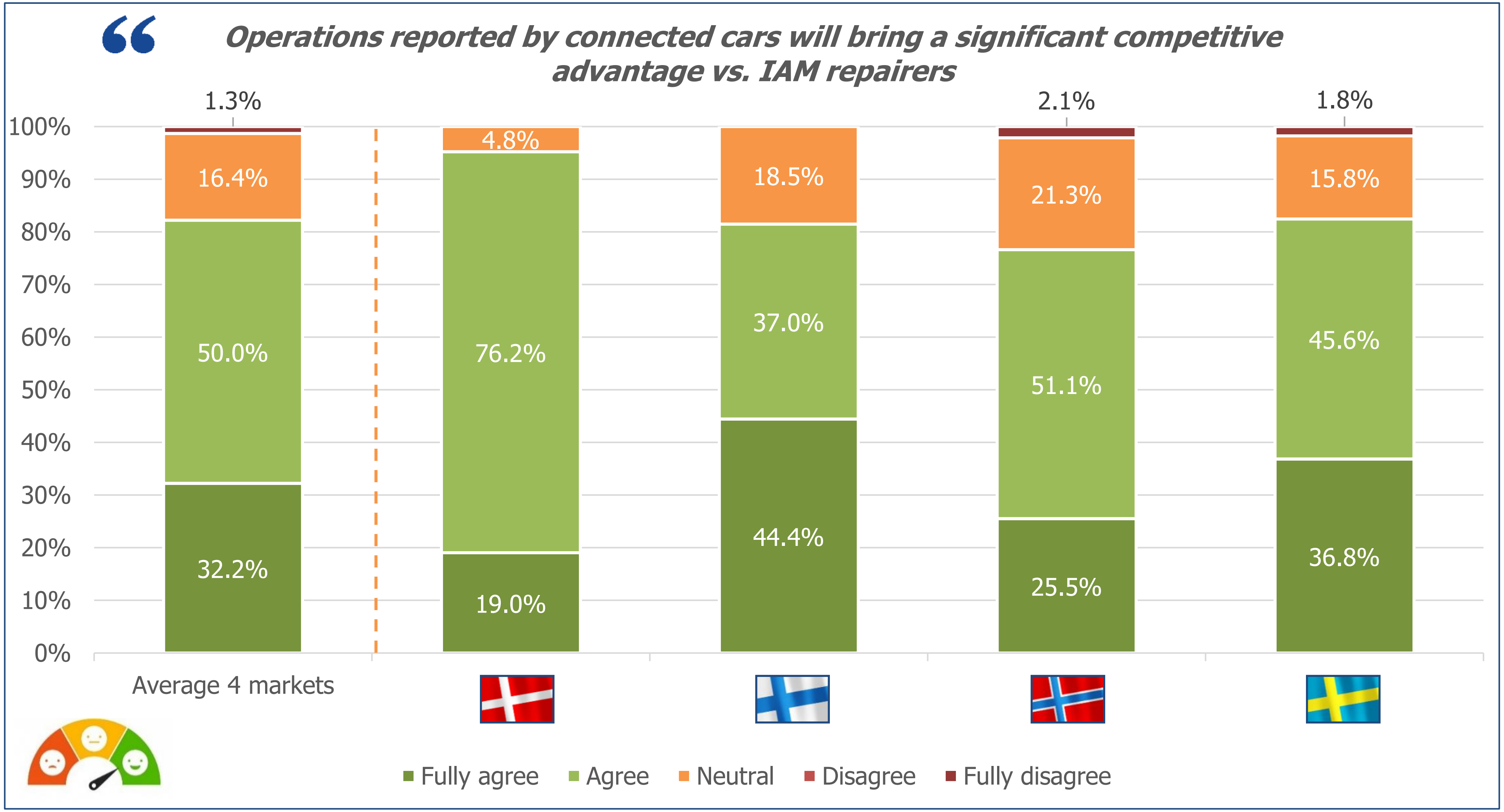
Connected cars

Workshop

More than 50% of Finnish dealers fear that the majority of connected car-generated revenues will be captured by the OEMs. This share is around 32% in Sweden and Norway

Source: ICDP Nordic dealer survey 2025; n = 151

More than 82% of Nordic dealers believe connected cars will be a positive factor in winning business from the independent aftermarket sector

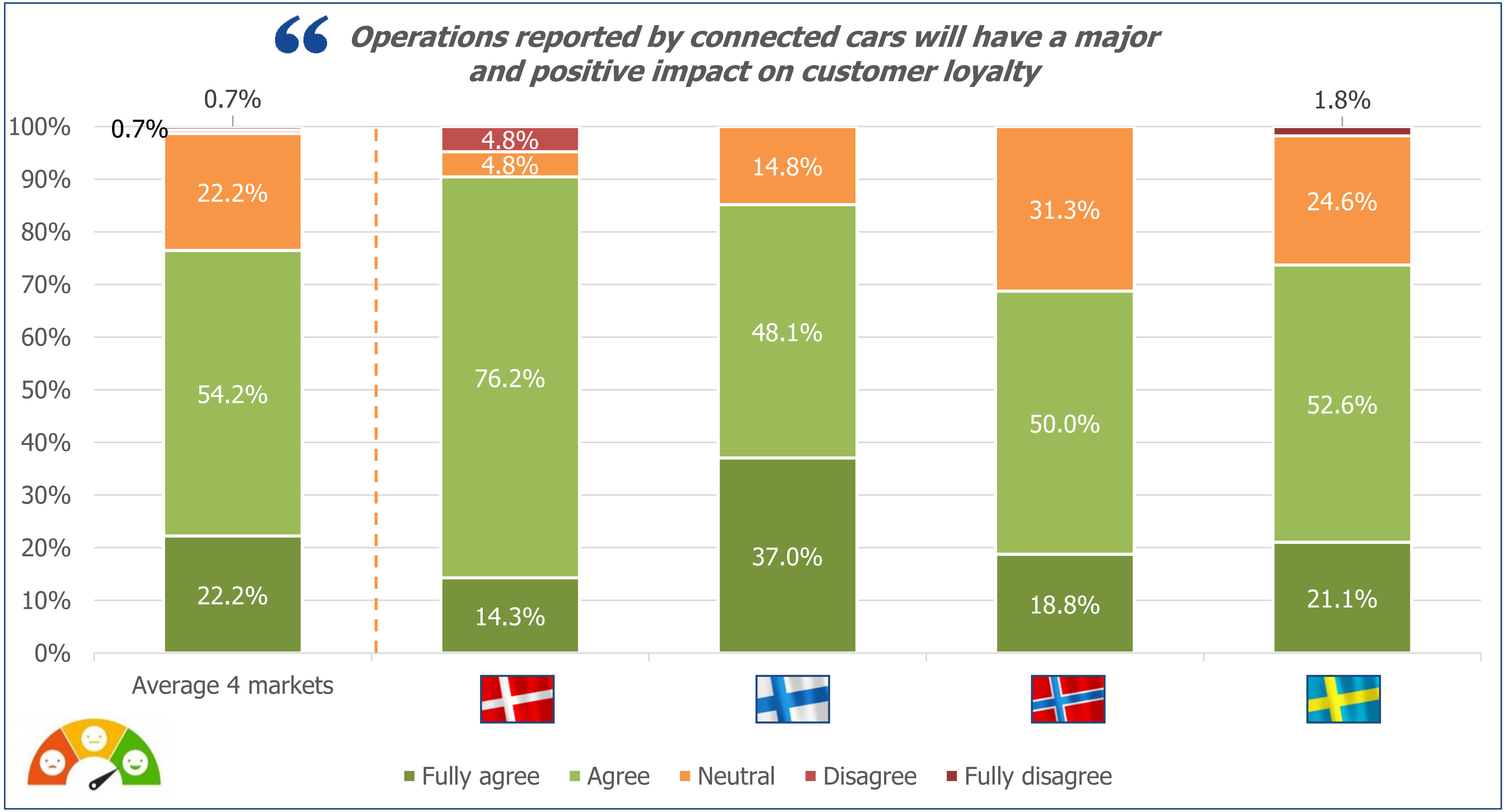


Connected cars

The split between markets is again evenly balanced, although Danish dealers seem much more convinced than their counterparts in the other markets of the ability of connected cars to steer business to dealers rather than to the IAM

Source: ICDP Nordic dealer survey 2025; n = 152

There is also consensus among dealers of all the Nordic markets that connected cars will eventually have a positive impact on customer loyalty



Source: ICDP Nordic dealer survey 2025; n = 153

Connected cars

Workshop

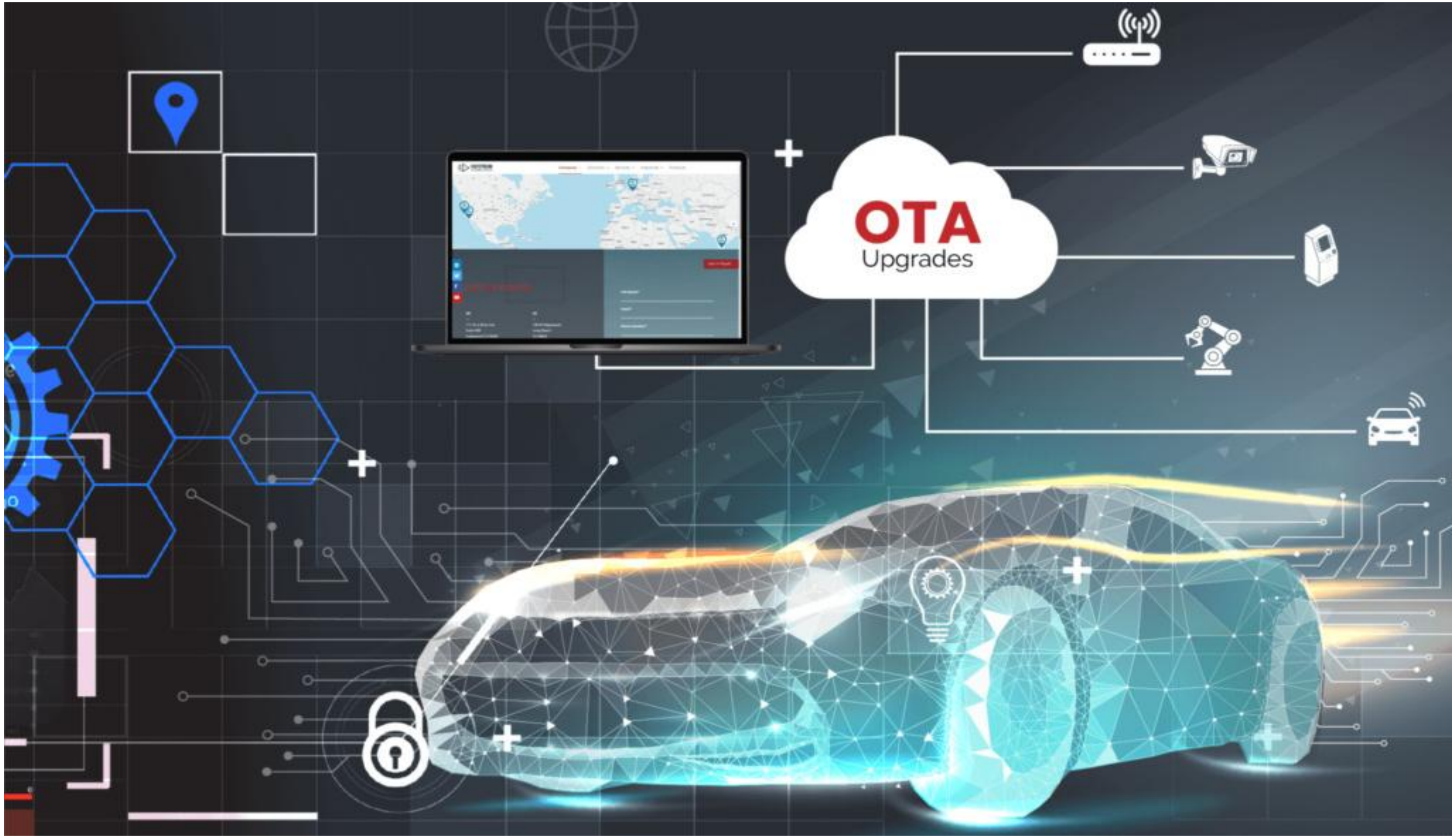
Danish dealers say that they are already benefiting more than others from the ability of connected cars to book appointments directly. Perhaps this is why they are also the most confident in the ability of connected cars to strengthen customer loyalty

Connected cars will be a major source of business for dealers in the future … although OEMs could get their hands on at least some of the revenues they generate

- The number of service jobs reported to dealer workshops by connected cars is still low
  - Less than 20% of appointments are currently generated by connected cars
- But dealers see connected cars becoming a major source of workshop business in the future
  - Although a large share suspect that most revenues generated will be kept by OEMs
- Nevertheless, connected cars should help dealers to increase both customer loyalty and their competitiveness

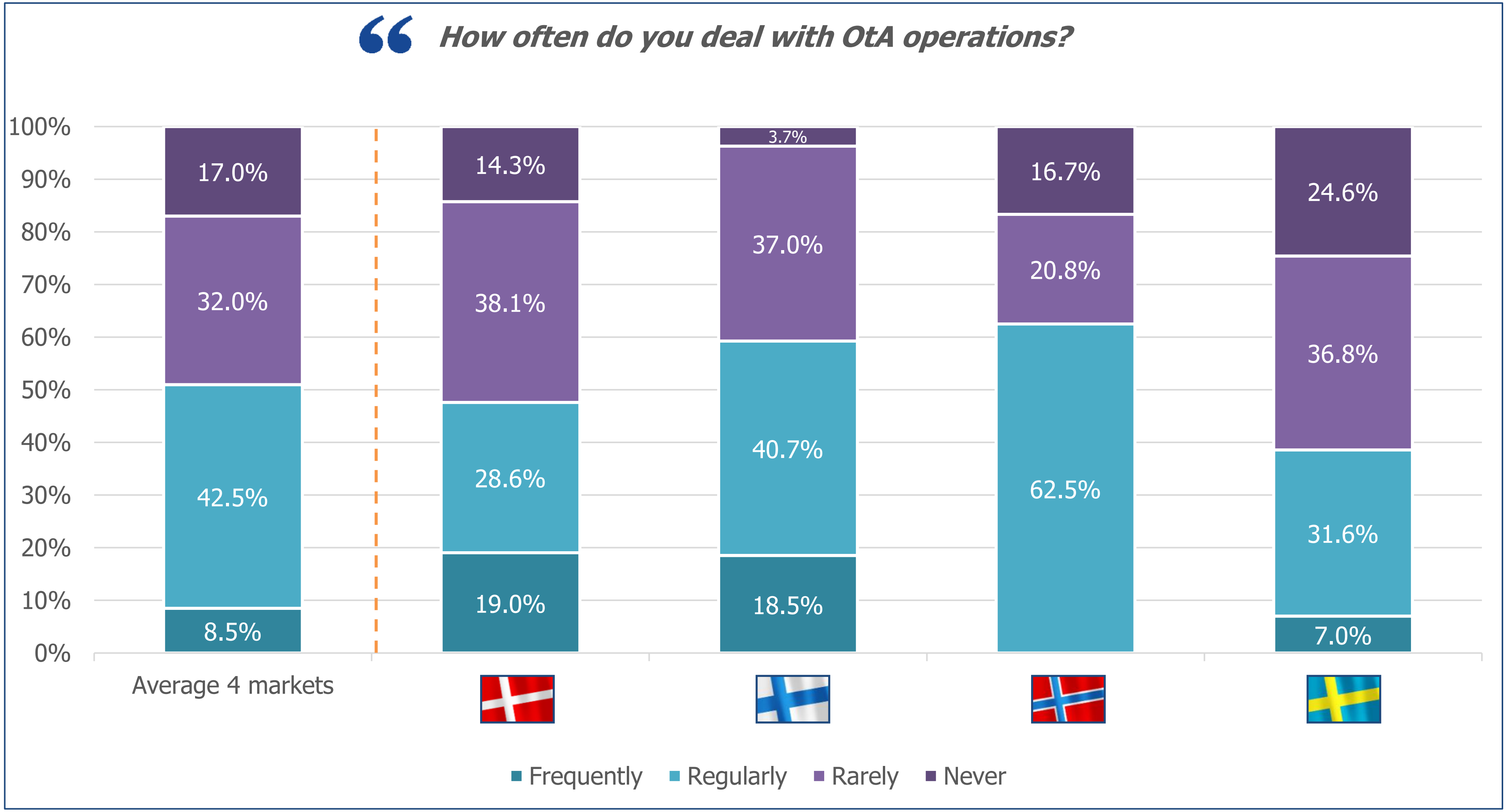
Source: ICDP

Digitalisation – current use of Over-the-Air technology



3.b

More than half of Nordic dealers say that they are carrying out OtA jobs ‘frequently’ or ‘regularly’

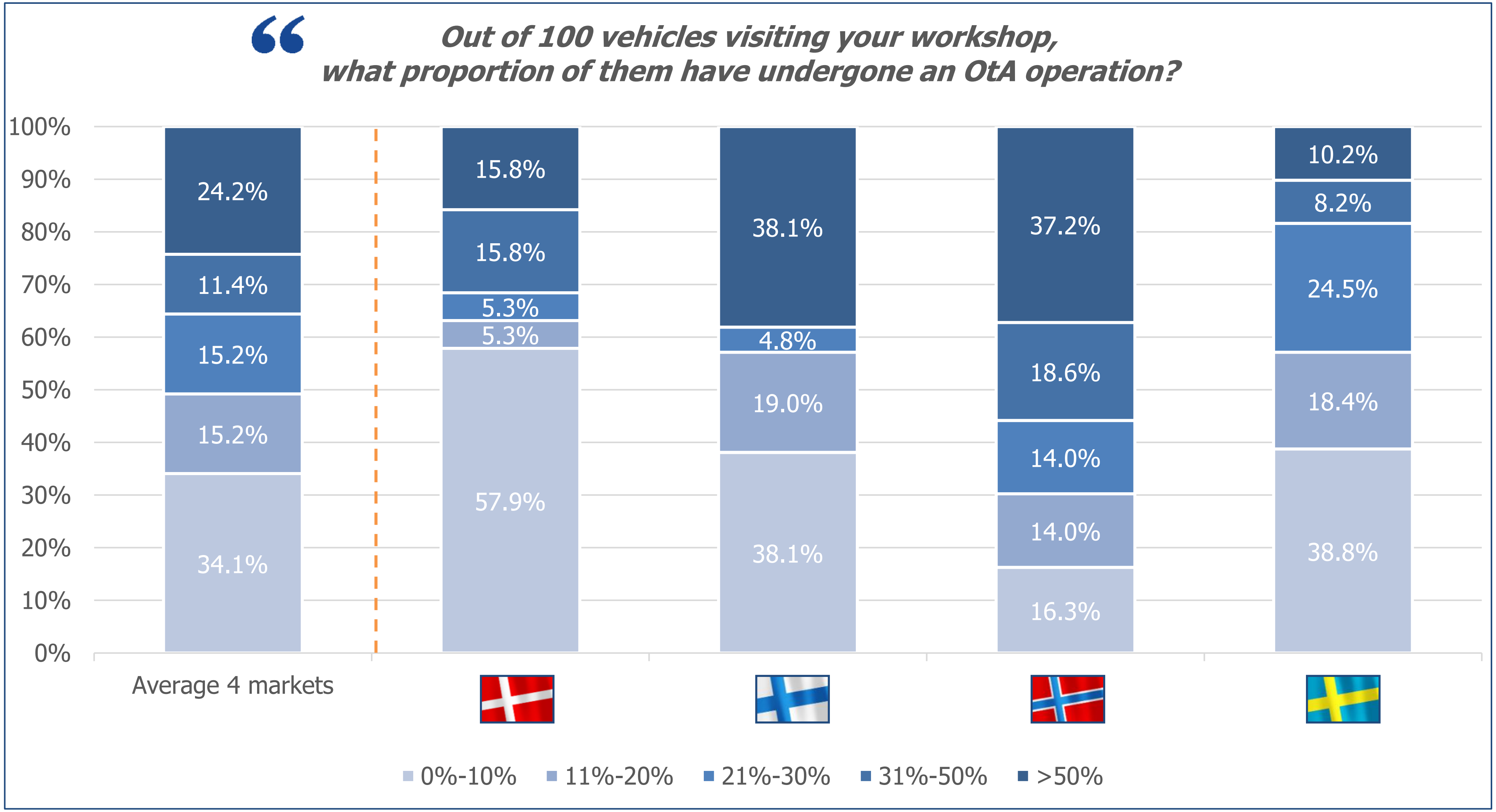


Over the Air

The combined share of dealers who deal ‘regularly’ and ‘frequently’ with OtA is 63% in Norway. Could this be linked to the higher share of BEVs (requiring more software updates for their powertrain) in the Norwegian car parc?

Source: ICDP Nordic dealer survey 2025; n = 153

For nearly a quarter of the dealers (and up to 37-38% in Finland and Norway), more than 50% of the cars entering their workshop have undergone an OtA operation



Over the Air

Workshop

N.B. comparing this data set with that for connected cars raises doubts over whether dealers fully understood this question, so the results should be treated with caution

Source: ICDP Nordic dealer survey 2025; n = 132

What are the key lessons to be learned from the dealer survey?

4

The BEV aftersales ecosystem will tend to 'normalise' as the BEV car parc grows. However, some specific impacts will still require dealer workshops to adapt

The BEV customers' greater loyalty to dealers will fade over time, and will get closer to that of ICE customers

Dealers should expect a decline in BEV customer loyalty to their workshops

And they should expect service plans for BEVs to be used less frequently

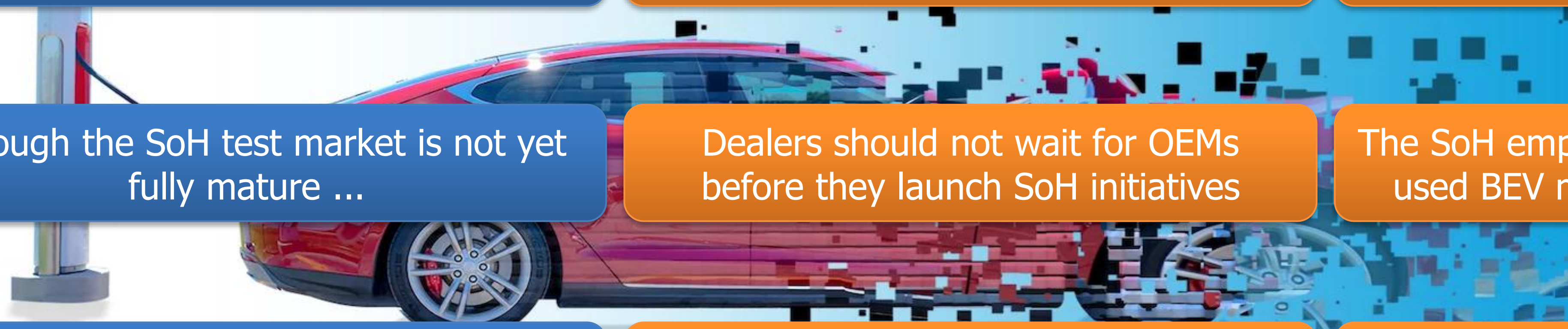
Customers will grow more aware of their BEV's lower service requirements

The use of a BEV-specific labour rate should be ruled out

To meet customers' needs, changes in aftersales advisors' roles are required

Advice and practical information on BEV-related services are valued

This could require specific training to enhance aftersales advisor profiles



Although the SoH test market is not yet fully mature ...

Dealers should not wait for OEMs before they launch SoH initiatives

The SoH emphasis should be put on the used BEV market for the time being

Given the investment required, not all HV battery-related services can be offered

BRCs appear to be a higher priority than 24/7 charging stations

BRCs need volume to be profitable -> are there B2B options to investigate?

Source: ICDP

On more 'traditional' aftersales topics, there are also major challenges that dealers will need to meet

In the current context, attracting and retaining the older car is key for dealers

According to dealers, it is difficult to run this activity on the same premises

Need to develop alternative formats or cooperate with/acquire IAM workshops

Given BEVs' features, tyres are likely to become the main reason for needing to visit a workshop in the future

Dealers are not competitive enough in the tyre market segment currently

Specific strategies to be set by dealers themselves or through OEM support

Connected cars and OtA: the new Eldorado for OEM franchised workshops?

Dealers benefit from a head-start, but IAM players will adapt eventually

Seize all current customer contact opportunities to reinforce relationships

Source: ICDP

In a challenging aftersales environment, the support provided by dealer associations to their members will continue to be key

Offer BEV-related training sessions dedicated both to technicians and to aftersales advisors

Help dealers wishing to invest in battery repair centres to adapt the scale of their facilities to demand

Set partnerships with SoH specialist providers to promote trusted ‘certificates’ for workshops and used car sales

Assist dealers in optimising the diversification of their aftersales activities towards older cars

Encourage dealers to focus more on tyres and their related services

Source: ICDP

Automotive distribution research, insight, implementation

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