DIGITAL MATURITY REPORT

by ultimedia

2023 DIGITAL MATURITY REPORT

The Top 50 Global Automotive Part Suppliers

How digitally effective are the world's leading suppliers and their brands?

About this report

The automotive sector stands at a crucial juncture in its digital transformation. When it comes to innovative vehicle manufacturing, the industry has undergone significant changes to embrace digital practices and technologies to meet consumer expectations. The ABI reported, a staggering £100 billion was invested in 2022, with a projected annual investment of £238 billion by 2030, specifically in electric vehicles. However, this substantial investment often fails to translate into compelling online experiences beyond the physical products themselves. Automotive suppliers have fallen behind their counterparts in the sector and now face the risk of struggling to compete in an increasingly digital-first landscape. This report reveals how the top 50 automotive component suppliers in the world are addressing the challenge posed by this demanding shift towards digitalisation.

The internet serves as the primary platform for individuals seeking automotive products and support. Both B2C and B2B automotive buyers rely on digital channels to gather information about the best products available. It is crucial for suppliers and their brands to adopt digital best practices in order to align themselves with the increasingly digitised automotive sector and meet the expectations of their customers. Failing to do so will result in losing out to competitors.

A personalised and seamless user experience is essential for organisations to facilitate easy engagement. Whether it involves streaming a Netflix series, ordering a takeaway, or purchasing a new car. Information, products, and services are accessible 24/7 with a simple click of a mouse. The convenience of online purchases is a driving force for modern audiences, regardless of whether they are making a personal or professional purchase.

More than 50% of B2B buyers prefer using e-commerce platforms for their purchases, and 80% expect the same level of personalised, efficient, and accessible buying experience as B2C customers, across various devices and at their convenience. Our findings support the observation that the sector lacks digital maturity and emphasise the potential opportunities available to the top 50 automotive suppliers and their brands.

Despite online searches being the initial step for over two-thirds of buyers, with 60% of automotive-related queries being performed on mobile devices, many suppliers have not fully transitioned to a “digital-first” approach, and traditional “offline” working practices remain the norm in the sector.

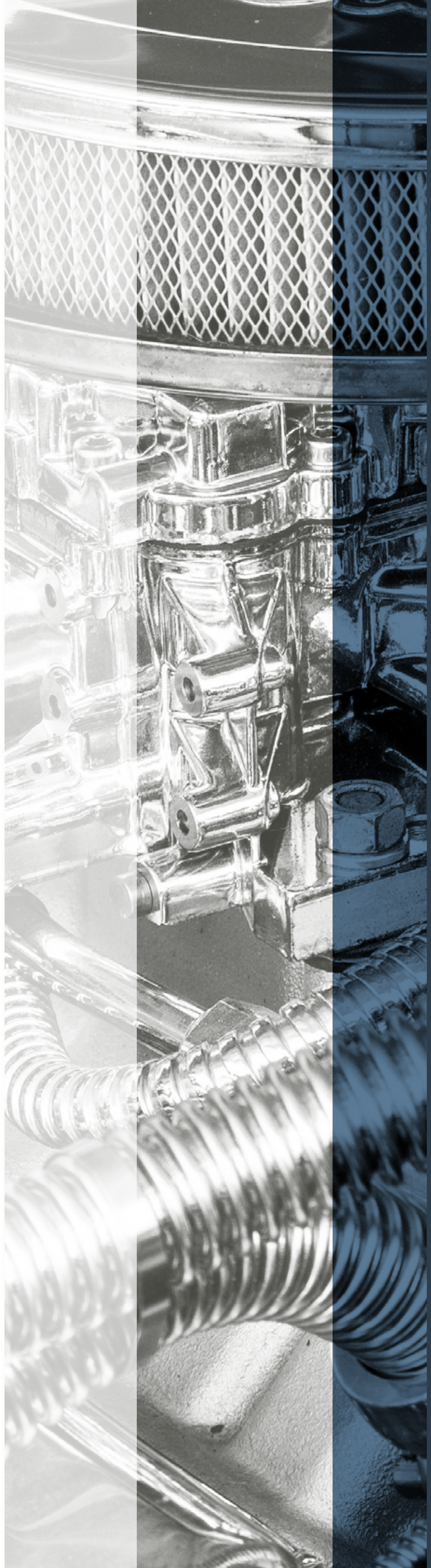
Embracing digital transformation offers significant benefits. Digitally savvy automotive suppliers are able to generate new business opportunities while building trust with their customers. In contrast, other automotive suppliers have failed to adopt quick and efficient tactics for generating more leads.

Through an extensive two-month research and analysis process, we evaluated the digital effectiveness of the world’s top 50 automotive suppliers and their brands (79 in total). Our findings provide insights into each brand’s performance across ten core digital aspects of transformation. Based on this analysis, we have ranked the top 79 brands in terms of their digital maturity.

Who should read this report?

The results and recommendations in this report are primarily for ambitious automotive professionals that are keen to embrace change. This report has been created to share with professionals in the automotive sector, experts in digital marketing and anyone with an interest in digital transformation. Throughout the report we have included guidance for suppliers and brands on how they can overcome common challenges and improve their digital strategy.

The research utilises data from a wealth of tools and sources including Google. The tests in this report were carried out between 27/04/2023 - 19/05/2023 and are representative of that period. The full scoring methodology is available here:



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Introduction

Our research into the top 50 global automotive suppliers and their brands highlights key areas for digital improvements, alongside common challenges and guidance on best practices for digital effectiveness.

We examined the digital performance of a total of 79 different brands and found that 85% of the world's top automotive suppliers have ineffective websites and lag far behind other automotive organisations in terms of digital maturity. It's not surprising that most of the leading suppliers are neglecting digital investment, and as a result, their outcomes reflect this. We observed security issues, ineffective messaging, frustratingly slow loading times, and poorly executed digital marketing. Unfortunately, even brands with websites on high-quality platforms are suffering from inadequate implementation, resulting in missed opportunities.

"85% of the world's leading automotive part suppliers and their brands have ineffective websites"

84% of the world's top automotive suppliers fell short of reaching a digital maturity level above 50%. It was disappointing to see that the leaders in the sector struggled to provide captivating digital experiences and keep up with the expectations of modern consumers. To illustrate this underwhelming performance, we developed an online solution that serves as an inspiration for any ambitious automotive organisation. This solution sets a standard for the best practices in website design and demonstrates how automotive suppliers can make the most of their digital investments. This model can be a valuable resource for digital and marketing professionals who are eager to embrace digital transformation.

A modern digital experience offers customised content to cater to various audiences in different locations with diverse needs. Personalisation makes things easier for users, boosts engagement, and creates more chances for new business opportunities. It was concerning to discover that only one of the top global suppliers provides a personalised website experience to their visitors. This gives them a remarkable advantage over their competitors by allowing them to understand their audience better and foster meaningful customer relationships.

Many automotive suppliers are not taking advantage of the opportunity provided by Google to increase brand visibility, reach new audiences, and generate new business opportunities. Google processes a staggering 8.5 billion searches each day, and a significant 68% of business buying decisions begin with an online search. Ignoring this lucrative channel is something automotive suppliers cannot afford to do.

"68% of business buying decisions start with an online search "

"We show how any automotive supplier, with limited budget and a small in-house team, can be more effective than the top 50 within 6 months"

The research revealed some basic mistakes in Search Engine Optimisation (SEO), and we noticed that there were limited examples of using Google Ads or retargeting to reach specific audiences. We found a clear connection between the overall digital maturity of automotive suppliers and their performance in organic search marketing. In fact, all of the suppliers who scored well in digital maturity also ranked within the top 10 for organic search results.

Social media provides a powerful means to connect with existing audiences, amplify marketing messages, and build trust with consumers. With over 4.8 billion people, roughly 61% of the world's population, using social media, it presents an exciting opportunity for smart automotive marketers. However, we are disappointed to report that 30% of the suppliers we examined were either absent from important social media platforms or not posting frequently enough.

This report reveals the digital performance of the top 50 automotive suppliers and their brands. It provides insights into industry best practices, trends, as well as strengths and weaknesses of these suppliers. We compare their performances and offer recommendations on how to enhance their digital marketing strategies across 10 essential aspects.

To accompany this report we've produced an 'automotive sector specific' slide-deck for each of the top automotive suppliers. This contains actionable issues and is very direct. Whilst we wouldn't want to make this public, we're happy to share this with each company here.

To highlight best practice and demonstrate the 'art of the possible', we've created a demonstration that is relevant for any progressive automotive organisation. This shows how an agile organisation, with limited budget and a small in-house digital / marketing team can be more effective than the top automotive suppliers within the next 6 months. Get in touch to see the future for the sector.

02

Digital Maturity Explained

Digital maturity measures how effective and innovative an automotive supplier is based on their implementation of digital marketing and technology. The suppliers/ brands that embrace digital transformation and strive for a high digital maturity score are able to maintain outstanding service to their customers and remain competitive in their sector.

Digital maturity embraces multiple disciplines, including: IT, digital technology, marketing, communications and thought leadership. A mature digital business model influences recruitment, working process, and company culture.

What does this report measure?

For each of the top 50 automotive suppliers and their brands, we've tested and analysed their digital performance and presence across:

- **Audience Size**
- **Website Effectiveness**
- **Search Marketing (Organic)**
- **Search Marketing (Paid)**
- **Content Marketing**
- **Personalisation**
- **Remarketing**
- **Email Marketing**
- **Social Media**
- **Mobile App**

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Digital Maturity Results

Pos	Supplier Name	Brand Name	Score (%)
1	TE Connectivity	TE Connectivity	70.95
2	LG Electronics	LG Electronics	64.29
3	Magna	Magna	62.38
4	Pirelli	Pirelli	61.43
5	Continental	Continental	60.95
6	BASF	BASF	60.48
7	Goodyear	Goodyear	59.52
8	Aptiv	Aptiv	58.57
9	Panasonic	Panasonic North America	52.38
10	Bosch	Bosch	51.9
10	Hankook	Hankook	51.9
12	BorgWarner	BorgWarner	50.48
13	BorgWarner	Delphi Technologies	47.62
14	Cummins	Accelera	47.14
15	Michelin	Michelin UK	45.24
16	Autoliv	Autoliv	46.19
17	Cummins	Cummins	45.24
18	ZF	ZF	44.29
18	Aptiv	Motional	44.29
20	BorgWarner	DRiV	43.33
20	Hella	Hella	43.33
22	DENSO	DENSO	41.9
23	Faurecia	Faurecia	40.95
24	Bridgestone	Bridgestone	39.52
25	Tenneco	Tenneco	38.57
26	Lear	Lear	37.62
26	Benteler	Benteler	37.62
28	Mahle	Mahle	35.71
29	ZF	SACHS	35.24
30	Valeo	Valeo	34.76
31	Dana	Dana	33.33
32	Sumitomo Rubber Industries	Dunlop Motorcycle Tires	32.86
33	Brose	Brose	32.38
34	Adient	Adient	31.43
34	Gestamp	Gestamp	31.43
36	Hyundai Mobis	Hyundai Mobis	30
36	Plastic Omnium	Plastic Omnium	30
36	Sumitomo Rubber Industries	Falken Tires	30
39	ZF	BOGE	29.05
39	Aisin Seiki	Aisin Seiki	29.05
41	ZF	TRW	28.1
41	Magneti Marelli	Magneti Marelli	28.1
41	Dana	Spicer	25.24
44	Yazaki	Yazaki North America	24.76
45	JTEKT	JTEKT NA	24.29
46	Yanfeng	Yanfeng	23.81
46	Sumitomo Electric	Sumitomo Electric	23.81
46	Hitachi	Hitachi	23.81
46	Panasonic	Panasonic Automotive	23.81
50	Catl	Catl	23.33
51	Weichai Power	Weichai Power	22.38
52	Schaeffler	Schaeffler	21.9
52	Joyson Safety	Joyson Safety	21.9
54	Toyota Boshoku	Toyota Boshoku	20.48
55	Motherson Sumi	Motherson Sumi	20
56	BorgWarner	Hartridge	19.05
56	Yazaki	Yazaki Europe	19.05
56	Dana	Dana Aftermarket	19.05
59	Hyundai Transys	Hyundai Transys	18.1
60	ZF	LUCAS	17.14
61	BorgWarner	Delco Remy	16.67
62	Hasco	Hasco	15.71
62	Dana	Albarus	15.71
62	Dana	Victor Reinz	15.71
65	Hanon Systems	Hanon Systems	15.24
66	JTEKT	JTEKT EU	12.38
66	Toyoda Gosei	Toyoda Gosei	12.38
68	Dana	OpenECU	10.48
68	JTEKT	JTEKT Bearings	10.48
70	BorgWarner	BERU	9.52
71	BHAP	BHAP	8.57
71	Dana	Glaser	8.57
73	Dana	GWB	7.62
73	Dana	PIV	7.62
75	Dana	Transejes	5.71
76	Dana	Thompson	4.76
76	Dana	Tru-Cool	4.76
78	ZF	GIRLING	3.81
79	ZF	BRAKE	1.9

04 Audience Levels

The demand for automotive-related information online has surged, with Google searches increasing by 80% in the past 5 years. According to ahrefs, there are at least 1.6 million searches worldwide every day for the term “auto parts” alone. By leveraging various marketing channels like organic search, paid search, and social media, automotive suppliers have a tremendous opportunity to reach broader audiences.

We were eager to assess how much of this demand reaches the websites of the top 50 automotive suppliers and their brands. Using industry tools, we were able to accurately calculate the audience figures for each website, taking into account traffic from both organic and paid sources.

Although there were six automotive brands that achieved full marks for this category for meeting the testing criteria. The automotive brand with the highest audience level was LG Electronics reaching audience volumes surpassing 23,100,000 across organic and paid channels globally.

The world’s leading automotive part suppliers are struggling to reach valuable audiences. Our research revealed that only 9 out of the 79 brands are effectively utilising both organic and paid tactics, giving them a significant competitive advantage.

An astonishing 89% of the automotive brands we examined fell short in terms of audience size. Among these globally renowned brands, 55 of them completely missed out on capitalising on audiences through paid channels. This includes well-known suppliers like Bosch and Hasco. Our research discovered that while these brands attract online visitors, their audience primarily consists of individuals who are already aware of their brand. As a result, their websites fail to attract new potential customers. This presents a tremendous opportunity to drive revenue and increase brand awareness by expanding their digital marketing efforts to target specific search terms related to their products and services.

We also identified a correlation between audience level and digital maturity. Eight out of the ten most digitally mature automotive suppliers also excelled in terms of audience size. Interestingly, 37% of the brands with the lowest performance were using open-source website platforms like WordPress or Drupal. Investing in market-leading technology that aligns with the organisation’s calibre and ambitions is crucial to support digital and business performance. Our study further supports this notion, as 55% of the top performers in terms of audience level opted for top-tier platforms.

Good (75 - 100%)	Average (50 - 74%)	Poor (0 - 49%)			
LG Electronics	Hella	Tenneco	Cummins (Accelera)	JTEKT (NA)	Weichai Power
Pirelli	Magna	Autoliv	BorgWarner (Delco Remy)	Toyoda Gosei	Dana (PIV)
TE Connectivity	Aptiv	Gestamp	Bridgestone	Dana (Victor Reinz)	Sumitomo Rubber Industries (Falken Tires)
Continental	Aisin Seiki	Bosch	Joyson Safety	JTEKT (EU)	Schaeffler
Goodyear	Lear	BorgWarner (DRiV)	Hanon Systems	Hitachi	Panasonic (Automotive)
Hankook	Motherson Sumi	Toyota Boshoku	Mahle	Dana (Tru-cool)	Dana (Glaser)
BASF	Dana	Plastic Omnium	Yanfeng	Sumitomo Electric	Dana (Albarus)
Panasonic (N. America)	Michelin (UK)	Adient	Dana (Dana Aftermarket)	ZF (LUCAS)	ZF (BRAKE)
BorgWarner	BorgWarner (Delphi Technologies)	Brose	ZF (BOGE)	BorgWarner (BERO)	BHAP
	ZF (TRW)	Catl	Yazaki (Europe)	BorgWarner (Hartridge)	Hasco
	Faurecia	Dana (Spicer)	Hyundai Transys	Magneti Marelli	Dana (Transejes)
	ZF	Sumitomo Rubber Industries (Dunlop Motorcycle Tires)	Aptiv (Motional)	Valeo	JTEKT (Bearings)
	Cummins	Benteler	Yazaki (N. America)	Dana (GWB)	Dana (Thompson)
		Hyundai Mobis	ZF (SACHS)	Dana (OpenECU)	
		DENSO		ZF (GIRLING)	

05

Website Effectiveness

Customers have high expectations for the brands they interact with when it comes to digital accessibility. The centrepiece of this digital infrastructure is the organisation's website. Unfortunately, the automotive industry has often overlooked the importance of a well-performing website. However, disregarding the potential benefits that a high-performing website can bring to brand reputation and revenue poses a significant risk.

A website must be available 24/7 and accessible on all devices. Visitors to a website have limited patience and short attention spans. Considering that approximately 80% of the global population (around 6.6 billion people) own a smartphone, mobile accessibility is crucial for success. Websites that are ineffective in providing a seamless experience on mobile devices are at a heightened risk of losing customers to their competitors.

We looked at how the top 50 automotive part suppliers and their brands performed across four areas that underpin website effectiveness:

- **Website page speed**
- **Mobile friendliness**
- **Accessibility**
- **Multilingual options**

> "85% of the world's top automotive part suppliers have ineffective websites"

Before making a purchase decision, automotive consumers typically research their options across an average of 4 websites, using various devices. This highlights the crucial importance of designing, building, and optimising automotive supplier websites to maximise their performance.

Phone calls serve as one of the most effective channels for conversion in the automotive industry, with only about 25% of purchases occurring online. However, numerous reports indicate that customers often resort to making phone calls due to poor user experiences on websites. Our findings support this, revealing that a staggering 85% of the world's top automotive suppliers have ineffective websites, with none of them receiving a perfect score. Among the poorest performers are Yazaki Europe, Hyundai Transys, and Toyoda Gosei, all of whom failed to earn any points in our evaluation.

Loading Speed

In the online world, customers value speed, and websites that load quickly not only keep audiences satisfied but also create a positive impression and can directly impact SEO performance.

Mobile devices account for 60% of all automotive-related searches, but it's also the platform where users are less tolerant of slow-loading websites. In fact, a significant 85% of mobile users expect web pages to load as fast as, if not faster than, on desktop.

> "Only 3 of the world's top automotive suppliers pass Google's basic website speed tests"

According to Google, the recommended best practice for web page load speed is under three seconds. Surprisingly, only PIV, Joyson Safety, and Panasonic Automotive meet this standard among the brands we examined. Furthermore, 47% of people expect a website to load in under two seconds. A mere one-second delay can result in tripled abandonment rates, reaching as high as 90%. Our evaluation of the 79 brand websites revealed that 91% of the world's top automotive suppliers are disregarding the importance of site speed and its detrimental impact on new business opportunities and reputation.

The issue of page speed extends beyond the sector as well. The slowest load time we measured was a staggering 19 times slower than Google's recommendation and even slower than some of their competitors. For instance, Dana Aftermarket's website took nearly 1 minute to load, which is almost four times slower than a 1.2 litre Vauxhall Corsa taking off from 0 to 100 mph. It was surprising to find well-known names like Michelin UK, Hitachi, and Dunlop Motorcycle Tires failing to achieve load times faster than 14 seconds.

Website speed emerges as a clear weakness among the top automotive suppliers. Our research uncovered evidence of bloated websites with unnecessary images and videos. We also identified shortcomings in design and development practices. To address these issues, we have compiled a list of actionable insights that can be shared with development partners to make an immediate improvement.

Mobile Friendly

Mobile devices account for 60% of all automotive searches, and over the past year, there has been a notable 51% increase in automotive-related searches conducted on mobile devices. Automotive organisations that disregard the significance of this trend run the risk of losing out to their competitors and leaving potential customers disappointed.

61% of website visitors will not return to a website that is not optimised for mobile devices. Therefore, automotive part suppliers that neglect mobile accessibility not only disappoint their audiences but also give their competitors an advantage. While the majority of the organisations we studied have mobile-friendly websites, it is concerning that 23% of suppliers failed to meet this requirement.

Unsurprisingly, the suppliers lacking mobile-friendly websites also performed poorly in terms of overall digital maturity, with only one supplier managing to secure a position in the top 10.

> "23% of the top automotive suppliers fail on mobile devices"

In terms of mobile effectiveness, there were several common shortcomings observed, such as the absence of clickable elements, optimised content, and responsive designs. Suppliers who fail to provide a positive user experience on mobile devices not only put their reputation at risk but also lose out on valuable website traffic to their competitors, both from potential customers and prospective employees.

Multilingual

Since the top global automotive suppliers operate in various regions and a significant majority of internet users do not speak English as their first language, it is crucial for these companies to offer multiple language options on their websites. By providing multilingual versions of their websites, automotive part suppliers can expand their organic reach by ranking for keywords in languages other than English. This allows them to reach a wider audience and tap into new markets.

> "46% of the top automotive supplier's websites do not offer a translation facility"

Out of the 79 brands we examined, we discovered that 43 of them are offering multilingual experiences to their audience. However, it was quite surprising to find that almost half of the brands did not provide this feature, despite having invested in website technology capable of delivering such services on a large scale. This lack of multilingual support potentially alienates audiences, poses the risk of creating a subpar online experience, and gives competitors an advantage.

Accessibility

Consumers have more buying power than ever, with saturated markets, they now hold expectations around online experience standards. 71% of web users who have a disability abandon websites that are not fully accessible. Ensuring that a website is inclusive to all users ensures customer satisfaction and increases business reputation.

> "95% of the top automotive supplier websites fail accessibility testing"

Out of the brands we tested, only Tenneco, BorgWarner, Transejes, and Hartridge successfully passed the accessibility testing. This outcome is disappointing for the sector, especially considering that addressing accessibility issues is relatively straightforward. By neglecting to make their websites inclusive, suppliers are creating obstacles for a significant audience segment. Additionally, brand websites often play a crucial role in recruitment, shaping the perception of the organisation and its values. Ignoring accessibility concerns can have a negative impact on brand perception and recruitment efforts.

Website Effectiveness

(Continued)

Good 60 - 100% Average 40 - 59% Poor 0 - 39%

Pos	Supplier Name	Brand Name	Score %
1	BorgWarner	Hartridge	87.5
2	Mahle	Mahle	75
2	Magna	Magna	75
2	Dana	PIV	75
2	Joyson Safety	Joyson Safety	75
6	BorgWarner	BorgWarner	62.5
6	Aptiv	Aptiv	62.5
6	Aisin Seiki	Aisin Seiki	62.5
6	Hanon Systems	Hanon Systems	62.5
6	Hyundai Mobis	Hyundai Mobis	62.5
6	Benteler	Benteler	62.5
6	Faurecia	Faurecia	62.5
13	Dana	Transejes	50
13	Tenneco	Tenneco	50
13	Aptiv	Motional	50
13	Brose	Brose	50
13	Pirelli	Pirelli	50
13	Adient	Adient	50
13	Plastic Omnium	Plastic Omnium	50
13	Cummins	Accelera	50
13	Catl	Catl	50

Pos	Supplier Name	Brand Name	Score %
13	Yanfeng	Yanfeng	50
13	Dana	GWB	50
13	TE Connectivity	TE Connectivity	50
13	Sumitomo Rubber Industries	Falken Tires	50
13	Hasco	Hasco	50
13	DENSO	DENSO	50
13	Dana	Victor Reinz	50
13	ZF	LUCAS	50
13	Hitachi	Hitachi	50
13	Bosch	Bosch	50
13	BorgWarner	DRiV	50
13	BHAP	BHAP	50
13	Hankook	Hankook	50
35	Dana	Thompson	37.5
35	Lear	Lear	37.5
35	Dana	Tru-Cool	37.5
35	Michelin	Michelin UK	37.5
35	Magneti Marelli	Magneti Marelli	37.5
35	Motherson Sumi	Motherson Sumi	37.5
35	Dana	Spicer	37.5
35	Goodyear	Goodyear	37.5

Pos	Supplier Name	Brand Name	Score %
35	ZF	BOGE	37.5
35	ZF	ZF	37.5
35	BASF	BASF	37.5
35	Cummins	Cummins	37.5
47	Panasonic	Panasonic Automotive	25
47	BorgWarner	BERU	25
47	Dana	Dana	25
47	Panasonic	Panasonic North America	25
47	ZF	BRAKE	25
47	BorgWarner	Delco Remy	25
47	Dana	OpenECU	25
47	Yazaki	Yazaki North America	25
47	Sumitomo Electric	Sumitomo Electric	25
47	Continental	Continental	25
47	JTEKT	JTEKT NA	25
47	Schaeffler	Schaeffler	25
47	Bridgestone	Bridgestone	25
47	Valeo	Valeo	25
47	Gestamp	Gestamp	25

Pos	Supplier Name	Brand Name	Score %
47	LG Electronics	LG Electronics	25
47	Sumitomo Rubber Industries	Dunlop Motorcycle Tires	25
47	Dana	Albarus	25
47	BorgWarner	Delphi Technologies	25
47	ZF	SACHS	25
47	ZF	TRW	25
47	JTEKT	JTEKT EU	25
47	Hella	Hella	25
47	Dana	Glaser	25
47	Dana	Dana Aftermarket	25
47	Toyota Boshoku	Toyota Boshoku	25
47	JTEKT	JTEKT Bearings	25
47	Weichai Power	Weichai Power	25
47	ZF	GIRLING	25
76	Autoliv	Autoliv	12.5
77	Yazaki	Yazaki Europe	0
77	Toyoda Gosei	Toyoda Gosei	0
77	Hyundai Transys	Hyundai Transys	0

Search Marketing (Organic)

When people need quick access to automotive maintenance information, search engines are their go-to resource. Globally, Google alone processes over 8.5 billion searches every day, and a significant portion of these searches, approximately 33 million per month in the US, are related to the automotive industry. As the wider automotive industry strives to offer premium digital experiences that align with the quality of their products, it is crucial for automotive suppliers to recognise the significance of being visible and accessible to their customers online. Failure to do so puts them at risk of lagging behind their competitors.

SEO is crucial for automotive suppliers operating in the B2B sector, just like it is for dealerships and other B2C automotive businesses. Research shows that 68% of business purchasing decisions begin with an online search, and 75% of B2B buyers only focus on the first page of search results. In order to maximise their website's visibility and attract organic search traffic, marketers in the automotive industry need to prioritise SEO as a key component of their digital strategy.

When it comes to search marketing, Google dominates with a market share of over 92%. Therefore, it is imperative for digital marketers to follow Google's guidelines when developing their SEO strategies in order to achieve optimal outcomes.

> "Only 8% of the world's top automotive suppliers' websites are following SEO best practice."

In 2023, people from the Millennial generation, who are between the ages of 27 and 42, will have more influence in making decisions and buying things related to cars. Since Millennials grew up with digital technology, businesses need to change how they market their products to reach this group and meet their expectations. Specifically, they should have a website that is easy to find on Google and provides a convenient online experience, no matter what device is used.

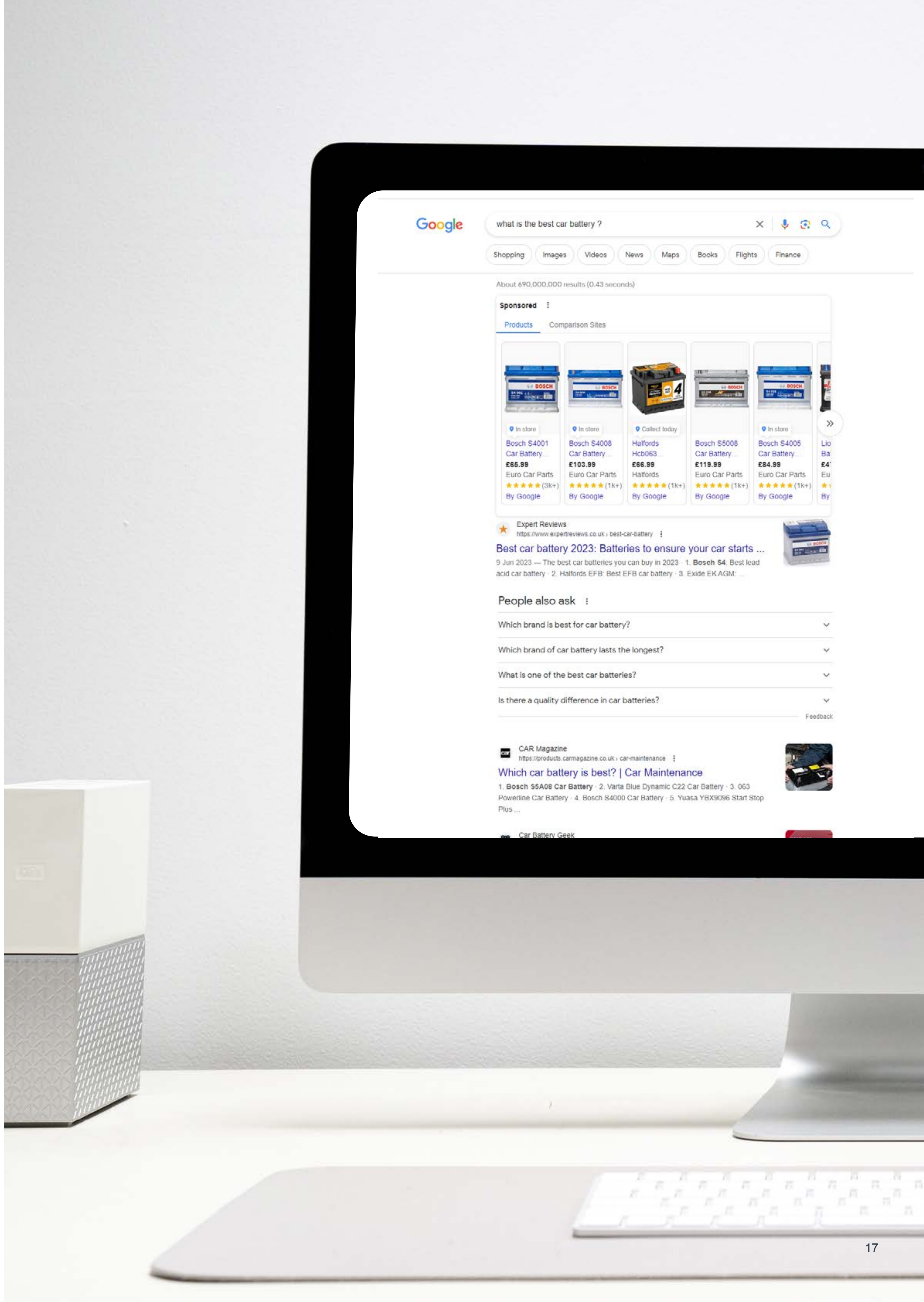
A lot of searches related to cars are done on mobile devices, so it's important to make sure the website works well on phones and tablets. This way, car suppliers can take advantage of the fact that people may browse their website on their mobile device and then decide to call the company.

When creating an SEO strategy, it's crucial to stay updated on what the target audience is searching for, adjust the content marketing accordingly, and keep track of progress. Good SEO practices also involve working with PR to get backlinks from reliable digital sources and aligning the strategy with social media to engage with the main audience groups and promote excellent website content.

Our research found a clear connection between search marketing and the overall level of digital maturity. Every supplier that achieved a high score in search marketing also ranked among the top 10 in terms of digital expertise. TE Connectivity and LG Electronics secured the highest positions for digital expertise in the industry, and interestingly, their scores align with their exceptional performance in organic search marketing.

This correlation was further supported by the findings for the 56 brands that scored poorly, with 52% of them falling into the lowest third for overall digital expertise. It was surprising to discover that 56% of the world's leading automotive suppliers received no points in this category, including Faurecia and Benteler.

Automotive suppliers who put significant effort into enhancing their global visibility on Google for relevant keywords can expect to reap the benefits at both local and international levels.



Search Marketing (Organic)

(Continued)

Good 75 - 100% Average 50 - 74% Poor 0 - 49%

Pos	Supplier Name	Brand Name	Score %
1	TE Connectivity	TE Connectivity	100.00
1	LG Electronics	LG Electronics	100.00
1	Pirelli	Pirelli	100.00
4	Continental	Continental	83.33
4	Goodyear	Goodyear	83.33
4	Panasonic	Panasonic North America	83.33
7	BASF	BASF	66.67
7	Bosch	Bosch	66.67
7	Hankook	Hankook	66.67
7	Hella	Hella	66.67
11	Magna	Magna	50.00
11	Aptiv	Aptiv	50.00
11	BorgWarner	BorgWarner	50.00
11	BorgWarner	Delphi Technologies	50.00
11	Michelin	Michelin UK	50.00
11	Cummins	Cummins	50.00
11	ZF	ZF	50.00
11	BorgWarner	DRiV	50.00
11	Tenneco	Tenneco	50.00
11	Lear	Lear	50.00

Pos	Supplier Name	Brand Name	Score %
11	Dana	Dana	50.00
11	Gestamp	Gestamp	50.00
11	ZF	TRW	50.00
24	DENSO	DENSO	33.33
24	Mahle	Mahle	33.33
24	ZF	SACHS	33.33
24	Sumitomo Rubber Industries	Dunlop Motorcycle Tires	33.33
24	Dana	Spicer	33.33
29	Bridgestone	Bridgestone	16.67
29	Valeo	Valeo	16.67
29	Brose	Brose	16.67
29	Aisin Seiki	Aisin Seiki	16.67
29	Motherson Sumi	Motherson Sumi	16.67
29	Dana	Dana Aftermarket	16.67
29	BorgWarner	Delco Remy	16.67
36	Cummins	Accelera	0.00
36	Autoliv	Autoliv	0.00
36	Aptiv	Motional	0.00
36	Faurecia	Faurecia	0.00
36	Benteler	Benteler	0.00
36	Adient	Adient	0.00

Pos	Supplier Name	Brand Name	Score %
36	Hyundai Mobis	Hyundai Mobis	0.00
36	Plastic Omnium	Plastic Omnium	0.00
36	Sumitomo Rubber Industries	Falken Tires	0.00
36	ZF	BOGE	0.00
36	Magneti Marelli	Magneti Marelli	0.00
36	Yazaki	Yazaki North America	0.00
36	JTEKT	JTEKT NA	0.00
36	Yanfeng	Yanfeng	0.00
36	Sumitomo Electric	Sumitomo Electric	0.00
36	Hitachi	Hitachi	0.00
36	Panasonic	Panasonic Automotive	0.00
36	Catl	Catl	0.00
36	Weichai Power	Weichai Power	0.00
36	Schaeffler	Schaeffler	0.00
36	Joyson Safety	Joyson Safety	0.00
36	Toyota Boshoku	Toyota Boshoku	0.00
36	BorgWarner	Hartridge	0.00
36	Yazaki	Yazaki Europe	0.00
36	Hyundai Transys	Hyundai Transys	0.00

Pos	Supplier Name	Brand Name	Score %
36	ZF	LUCAS	0.00
36	Hasco	Hasco	0.00
36	Dana	Albarus	0.00
36	Dana	Victor Reinz	0.00
36	Hanon Systems	Hanon Systems	0.00
36	JTEKT	JTEKT EU	0.00
36	Toyoda Gosei	Toyoda Gosei	0.00
36	Dana	OpenECU	0.00
36	JTEKT	JTEKT Bearings	0.00
36	BorgWarner	BERU	0.00
36	BHAP	BHAP	0.00
36	Dana	Glaser	0.00
36	Dana	GWB	0.00
36	Dana	PIV	0.00
36	Dana	Transejes	0.00
36	Dana	Thompson	0.00
36	Dana	Tru-Cool	0.00
36	ZF	GIRLING	0.00
36	ZF	BRAKE	0.00

07

Search Marketing (Paid)

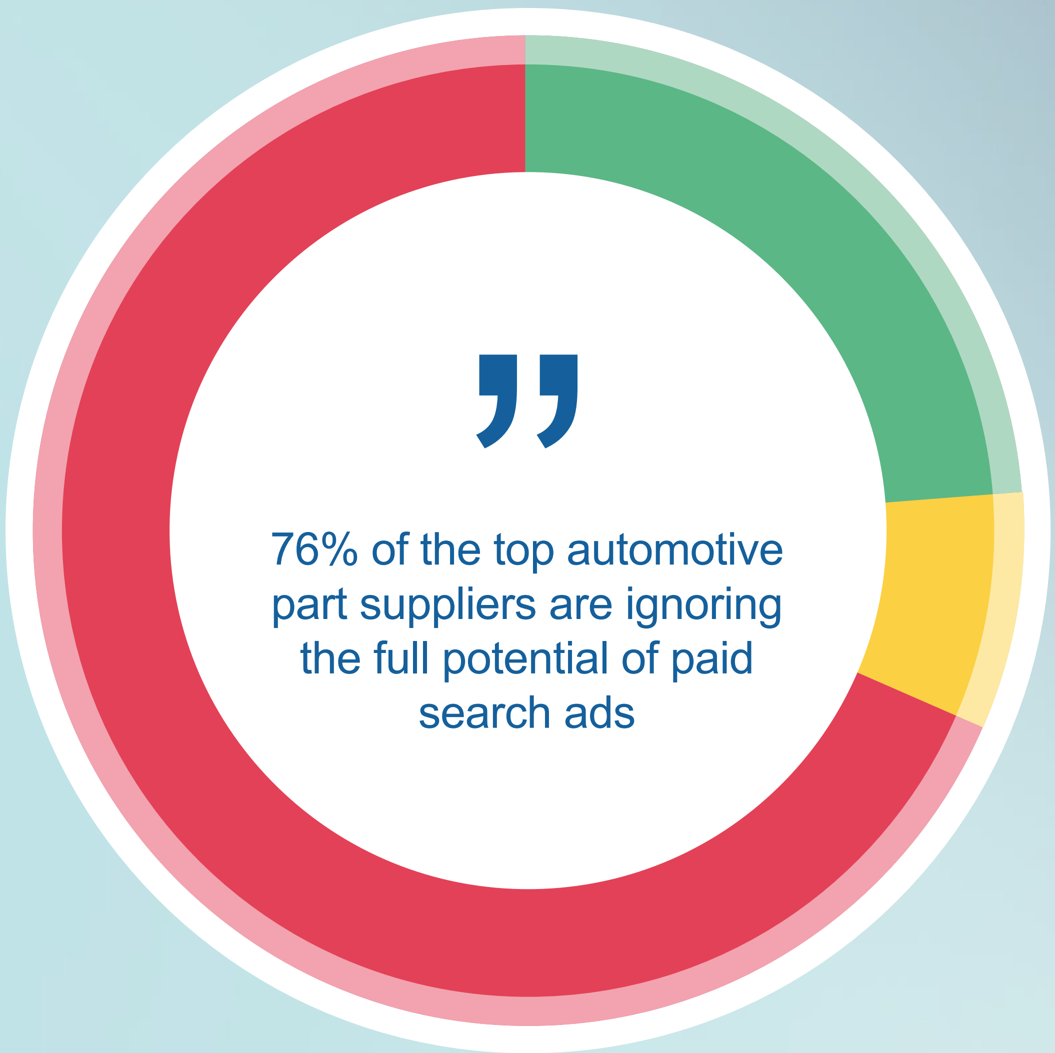
The global automotive industry's digital ad market is predicted to grow to $35.7 billion by 2025. Following a spending increase of 13.7% in 2022 and at least a further 11% in 2023 automotive advertising is expected to become even more competitive as organisations switch on to the value digital ads can bring to their business.

Automotive audiences perceive the brands appearing at the top of search results as trustworthy industry leaders. Paid advertising offers automotive marketers the ability to design customised and precise ads that effectively reach specific target audience segments. It allows for filters based on factors like location, industry, job title, and more. Paid search is a dynamic strategy that can quickly generate results.

In comparison to other industries, automotive keywords have a relatively low cost, with an average cost per click (CPC) of $2.46. Conversion data from Ruler Analytics reveals that 38% of automotive website visits through paid search result in valuable actions, indicating the attractive return on investment (ROI) opportunities this channel offers.

Among the suppliers we examined, LG Electronics, TE Connectivity, and Hankook stood out by targeting the highest number of keywords on a global scale. This strategic approach enabled them to reach a larger and relevant audience worldwide.

While reports indicate that the automotive sector has been increasing its investment in paid search, our research suggests that part suppliers still have some catching up to do. Astonishingly, 68% of the leading part suppliers worldwide are completely neglecting this channel, with no activity at all. In total, 76% of the top automotive part suppliers are not utilising the full potential of paid search, missing out on the chance to appear for their brand terms. Instead, they solely rely on organic search performance, which poses a risk considering that their competitors are also neglecting SEO.



Good (75 - 100%)

- LG Electronics
- TE Connectivity
- Hankook
- Pirelli
- Continental
- Panasonic (N. America)
- Goodyear
- Cummins (Accelera)
- BASF
- DENSO
- Magna
- ZF (BOGE)
- Aptiv (Motional)
- BorgWarner
- Autoliv
- ZF (SACHS)
- Bridgestone
- BorgWarner (Delphi Technologies)
- Hella

Average (50 - 74%)

- Cummins
- Benteler
- JTEKT (NA)
- Michelin (UK)
- Mahle
- Valeo

Poor (0 - 49%)

- Bosch
- ZF
- ZF (TRW)
- ZF (LUCAS)
- ZF (GIRLING)
- ZF (BRAKE)
- Hyundai Mobis
- Aisin Seiki
- Hasco
- Catl
- Lear
- Tenneco
- Yanfeng
- Faurecia
- Weichai Power
- Aptiv
- Sumitomo Electric
- BorgWarner (DRiV)
- BorgWarner (Hartridge)
- BorgWarner (Delco Remy)
- BorgWarner (BERU)
- Hitachi
- Adient
- Magneti Marelli
- Yazaki (N. America)
- Yazaki (Europe)
- Schaeffler
- Toyota Boshoku
- BHAP
- Panasonic (Automotive)
- Gestamp
- Plastic Omnium
- Dana
- Dana (Spicer)
- Dana (Aftermarket)
- Dana (Albarus)
- Dana (Victor Reinz)
- Dana (OpenECU)
- Dana (Glaser)
- Dana(GWB)
- Dana (PIV)
- Dana (Transejes)
- Dana (Thompson)
- Dana (Tru-Cool)
- JTEKT (EU)
- JTEKT (Bearings)
- Joyson Safety
- Motherson Sumi
- Sumitomo Rubber Industries (Dunlop Motorcycle Tires)
- Sumitomo Rubber Industries (Falken Tires)
- Hyundai Transys
- Toyoda Gosei
- Hanon Systems
- Brose

08

Content Marketing

Compared to traditional marketing, content marketing is 62% more cost-effective and has the potential to deliver returns that are up to three times higher than other marketing methods. It not only boosts SEO but also drives engagement on social media platforms. 90% of marketers who are currently investing in content marketing plan to continue doing so in the upcoming year.

For this report, we focused our attention on how content was being used from an inbound perspective. Our testing focussed on the primary goals for content and how effectively automotive part suppliers are using content to attract, engage and convert website visitors. Marketing professionals list the four most important content formats as:

- **Video**
- **Blogs**
- **Images**
- **Infographics**

For most of the world's top automotive suppliers, content marketing is an area where they need improvement. Only 28% of the suppliers featured in this report received a good score in this aspect. Our research revealed a connection between performance in content marketing and overall digital expertise. Among the top 10 digitally mature automotive suppliers, 8 of them received top scores for their content marketing efforts.

Typically, websites that have dedicated sections for blogs or news tend to appear more prominently in Google search results. Our findings support this, as 100% of the supplier websites without these sections performed poorly in organic search marketing. Well-known brands like BERU, Cummins, and Brake are missing out on the benefits of this valuable channel and the potential revenue it can generate.

Interestingly, 82% of people have a preference for brands that have a presence in content marketing, and 70% of individuals prefer to learn about a service or organisation through articles rather than advertisements. This is a great opportunity for automotive suppliers to take control of their messaging and create content that builds customer trust.

Videos related to automotive content attract 157% more natural traffic from search engines compared to static content. Moreover, 73% of people prefer learning about products or services through videos. This presents a fantastic opportunity for smart automotive marketers to take advantage of. Video content has been gaining popularity for a while, and especially since the pandemic, people worldwide have become accustomed to using and enjoying videos as their preferred type of content. For automotive suppliers, this is an excellent chance to create compelling marketing materials in the form of videos for platforms like YouTube, LinkedIn, and other channels. By doing so, they can better serve their customers and enhance their online visibility.

Despite this valuable opportunity, 67% of the world's top automotive part suppliers aren't leveraging the potential of video on their websites and are missing out on the chance to drive ROI.

Good (100%)

- Bosch
- ZF (LUCAS)
- Faurecia
- Aptiv
- Aptiv (Motional)
- Gestamp
- Benteler
- ZF (SACHS)
- Continental
- Bridgestone
- Goodyear
- Weichai Power
- BorgWarner
- BorgWarner (DRiV)
- Magneti Marelli
- BASF
- TE Connectivity
- Sumitomo Rubber Industries (Falken Tires)
- Pirelli
- Magna
- Cummins (Accelera)
- Autoliv

Average (51 - 99%)

- Hanon Systems
- DENSO
- ZF
- ZF (BOGE)
- ZF (TRW)
- Hyundai Mobis
- Aisin Seiki
- Michelin (UK)
- Catl
- Valeo
- Lear
- Yanfeng
- Sumitomo Electric
- BorgWarner (Delphi Technologies)
- BorgWarner (Hartridge)
- BorgWarner (Delco Remy)
- Hitachi
- Yazaki (N. America)
- Yazaki (Europe)
- Toyota Boshoku
- BHAP
- Panasonic (N. America)
- Panasonic (Automotive)
- Plastic Omnium
- Dana (OpenECU)
- Dana (Glaser)
- JTEKT (EU)
- JTEKT (Bearings)
- Hella
- Joyson Safety
- Sumitomo Rubber Industries (Dunlop Motorcycle Tires)
- Hyundai Transys
- Toyoda Gosei
- Brose

Poor (0 - 50%)

- Dana (Aftermarket)
- Dana (Albarus)
- JTEKT (NA)
- Motherson Sumi
- Hankook
- Hasco
- Tenneco
- Adient
- Mahle
- Dana
- Dana (Victor Reinz)
- LG Electronics
- ZF (Girling)
- ZF (Brake)
- BorgWarner (BERU)
- Schaeffler
- Cummins
- Dana (Spicer)
- Dana (GWB)
- Dana (PIV)
- Dana (Transjes)
- Dana (Tru-Cool)
- Dana (Thompson)

09

Personalisation

Users in both B2C and B2B settings expect a tailored experience when using digital services. Part of the appeal of Amazon, Netflix, Spotify and YouTube is the extent to which every experience is personalised. Automotive suppliers that implement personalisation can lower acquisition costs by up to 50%, boost revenues and elevate marketing spend efficiency by up to 30%, according to Mckinsey.

A significant majority of B2B buyers, about 75%, feel disappointed with the level of personalisation they receive during their purchasing process. Surprisingly, 80% of B2B buyers expect the same personalised experiences as B2C customers. Our research discovered that only one automotive supplier, Bosch, provides a personalised experience for their website visitors. This indicates that the automotive sector is missing out on numerous advantages for their organisations.

Around 65% of B2B buyers express dissatisfaction with vendors not adequately understanding their specific needs. Prioritising customer experience should be a top priority for all automotive suppliers, as satisfied customers are 80% more likely to renew their policies.

Typically, only a small fraction, around 2%, of website visitors convert on their initial visit. The remaining 98% of visitors return to a website at least twice before taking a desired action. Hence, personalising content for repeat visitors based on their browsing activity from their first session is a straightforward approach to enhance their experience. For many well-known brands, personalisation goes beyond attracting new customers; it is about retaining existing customers from a familiar audience. A substantial 75% of buyers would appreciate personalised recommendations from vendors they trust, while 83% believe it enhances their overall buying journey.

Customer centric automotive suppliers simply cannot afford to ignore this expectation. Advanced personalisation gives digital marketers the opportunity to create segments and personas to show unique content to different visitor groups. This will enhance engagement, increase client satisfaction and raise conversion rates.

Interestingly, over a third (37%) of the top automotive suppliers have expensive digital experience platforms (DXP) that claim to enable personalisation, such as Adobe and Episerver. However, they're not providing personalised content. This could be due to an inexperienced implementation partner that's not specialised with the technology or often organisations rely on an ageing platform that has hidden costs to access personalisation capabilities. Automotive suppliers that resonate with this and aren't getting the most from their platform should speak to an accredited platform partner to find out how to maximise their investment, or look at the Gartner Magic Quadrant Report to identify the best performing technology in the market.

On the other hand, some suppliers utilise platforms like WordPress that lack personalisation features. It is crucial for them to prioritise the inclusion of AI-driven personalisation when investing in a future-ready DXP platform.

Forward-thinking automotive suppliers should prioritise the ability to leverage personalisation. This tactic presents an opportunity to gain a competitive edge due to its relatively low budget requirements, quick deployment, and favourable results. To highlight the benefits of personalisation to automotive suppliers, we have developed a concept that demonstrates its potential.

Discover how part suppliers can swiftly and easily implement personalisation on their websites, catering to different audience segments. By doing so, they can improve the user experience, boost engagement, and achieve more goals.

BOOK A DEMO

Suppliers with personalisation
Bosch

10 Remarketing

Among various advertising strategies, retargeting stands out as the most effective, with an impressive efficiency rate of 1,046%. On average, a new customer will come across your brand through eight different interactions before making a purchase. By using remarketing, you can create familiarity with your brand, resulting in a click-through rate (CTR) that is 10 times higher than standard display ads. Remarketing is a powerful tactic that brings users back to your website at a minimal cost, making it an excellent investment.

The implementation of remarketing in the automotive sector is lacking. According to the survey, 51% of respondents have not set up any tracking system to enable the execution of remarketing campaigns. Additionally, 30% of automotive part suppliers and their brands only measure remarketing audiences on a single channel.

It is important to note that visitors who have been remarketed to are 43% more likely to become new customers.

98% of website visitors to an automotive website leave without converting.
Using remarketing ads alongside other advertising tools can increase the sales by 50%. Automotive suppliers can harness remarketing ads to re-engage previous visitors with their products through targeted via channels such as Google, LinkedIn, Facebook and other channels. Our research tested each website for evidence of remarketing across these channels. We found that 51% of the top global automotive suppliers are missing out on remarketing across all of these channels and haven't included any remarketing into their marketing activity.

Automotive audiences enjoy content that is tailored to them, with products of interest, at relevant times, through digital channels. This is particularly relevant for ads. 30% of people have a positive or very positive reaction to retargeted ads, while only 11% feel negatively about them. Remarketing tactics give automotive suppliers the opportunity to:

- Use customised audience lists for highly targeted ads
- Keep at the forefront of a client's mind to increase brand recall
- Boost conversions and generate revenue
- Gain insights into their audience's preferences and behaviour

Despite the challenges faced by the sector's leaders in achieving a high score for this aspect of digital maturity, our research revealed that Google tags were the most popular among the top suppliers, with 42% utilising this channel*. On the other hand, social remarketing tags, particularly on LinkedIn, were largely ignored by industry leaders. Surprisingly, only 13% of the world's leading automotive suppliers are leveraging these tags to their advantage.

Good (75 - 100%)

Lear
Aptiv
Aptiv (Motional)
Cummins (Accelera)
JTEKT (NA)
LG Electronics

Average (50 - 74%)

Panasonic (Automotive)
DENSO
ZF (LUCAS)
Magna
BorgWarner (DRiV)
BorgWarner (BERU)
Cummins
Dana
Sumitomo Rubber Industries (Dunlop Motorcycle Tires)

Poor (0 - 49%)

ZF (SACHS)
ZF (TRW)
ZF (GIRLING)
BorgWarner (Delphi Technologies)
Pirelli
Bosch
ZF (BOGE)
Aisin Seiki
Michelin (US)
Tenneco
Sumitomo Electric
BorgWarner (Delco Remy)
Adient
Magneti Marelli
Dana (Spicer)
Dana (Albarus)
Dana (OpenECU)
Dana (GWB)
Dana (Transjes)
Dana (Thompson)
Dana (Tru-Cool)
Autoliv
Motherson Sumi
Toyoda Gosei
ZF
ZF (Brake)
Hyundai Mobis
Continental
Bridgestone
Hasco
Catl
Valeo
Yanfeng
Faurecia
Goodyear
Weichai Power
BorgWarner
BorgWarner (Hertridge)
Hitachi
Mahle
Yazaki (N. America)
Yazaki (Europe)
Schaeffler
Toyota Boshoku
BHAP
Panasonic (N. America)
Gestamp
Plastic Omnium
Dana (Aftermarket)
Dana (Victor Reinz)
Dana (Glaser)
Dana (PIV)
BASF
JTEKT (EU)
JTEKT (Bearings)
Hella
Joyson Safety
Benteler
TE Connectivity
Sumitomo Rubber Industries (Falekn Tires)
Hyundai Transys
Hanon Systems
Brose
Hankook

*Some websites' tags were not available at the time of testing

11

Email Marketing

Email marketing remains the most effective form of digital marketing. At the end of 2022 there were 4.26 billion recorded global email users, a figure that is expected to rise by 100 million annually for the next three years. Audiences want to hear from the organisations that they interact with. 2023 data reports support this, with an average email open rate of 21.84% across the automotive sector.

Email is considered the most personal channel for receiving communication from a brand or organisation. The effectiveness of an email campaign improves when it is personalised. Research shows that personalised emails have a 29% higher open rate and a 41% higher click-through rate compared to generic emails. This marketing channel holds significant value for automotive suppliers as it allows marketing teams to establish stronger and more meaningful relationships with customers and key stakeholders. By creating authentic, informative, and relevant content, automotive suppliers can leverage email marketing to build better connections with their audience.

The pandemic put emphasis on digital communication for everyone. Email became critical for operations both internally and externally. Any long-term digital strategy requires keeping audiences engaged, this can easily be achieved through:

- Audience segmentation
- Personalisation of email content
- Automation of email delivery

81% of marketers consider email newsletters as their preferred form of content marketing. With an average return on investment (ROI) of 122% it becomes clear why. Emails provide a direct line of communication between suppliers and their audience, enabling marketers to establish regular and meaningful interactions with their target segments. For automotive marketers, email campaigns offer a way to foster trust and build relationships through personalised and timely communication, triggered at different stages of the customer journey. Whether it's sending order reminders, welcome campaigns, or promotional offers, the recent advancements in generative AI for email content creation free up valuable time for marketers to focus on other important activities.

We signed up for email alerts from the top automotive suppliers to see how often we received alerts and looked for personalisation and audience segmentation.

Only Autolive and Magna achieved a good score for their email marketing performance. Despite this being one of the most lucrative channels for automotive suppliers, 71% of the top global automotive suppliers don't offer website visitors the option to subscribe to a newsletter. Of the 23 brands that did provide the option to sign up for a newsletter, just 4 sent a follow-up email within a week.

It's alarming that only two suppliers are exploiting the benefits of email marketing and that the majority of the most successful automotive part suppliers are missing out entirely. For savvy suppliers this provides a huge opportunity to engage with their audiences, differentiate and gain a competitive advantage in the marketplace.

Good (76 - 100%)

- Magna
- Autoliv

Average (25 - 75%)

- ZF
- Bridgestone
- Valeo
- Aptiv
- BorgWarner (DRiV)

Poor (0 - 24%)

- Faurecia
- BorgWarner (BERU)
- BorgWarner (Delco Remy)
- Cummins (Accelera)
- Cummins
- Dana (Albarus)
- BASF
- TE Connectivity
- Michelin (UK)
- BorgWarner (Hartridge)
- Adient
- Panasonic (N. America)
- Dana (GWB)
- Dana (OpenECU)
- Dana (PIV)
- Dana (Spicer)
- Bosch
- DENSO
- ZF (BOGE)
- ZF (BRAKE)
- ZF (GIRLING)
- ZF (LUCAS)
- ZF (SACHS)
- ZF (TRW)
- Hyundai Mobis
- Continental
- Aisin Seiki
- Hasco
- Catl
- Lear
- Tenneco
- Yanfeng
- Goodyear
- Weichai Power
- Aptiv (Motional)
- Sumitomo Electric
- BorgWarner
- BorgWarner (Delphi Technologies)
- Hitachi
- Mahle
- Magneti Marelli
- Yazaki (Europe)
- Yazaki (N. America)
- Schaeffler
- Toyota Boshoku
- BHAP
- Panasonic (Automotive)
- Gestamp
- Plastic Omnium
- Dana
- Dana (Aftermarket)
- Dana (Glaser)
- Dana (Thompson)
- Dana (Transejes)
- Dana (Tru-Cool)
- Dana (Victor Reinz)
- JTEKT (Bearings)
- JTEKT (EU)
- JTEKT (NA)
- Hella
- Joyson Safety
- Motherson Sumi
- Benteler
- Sumitomo Rubber Industries (Dunlop Motorcycle Tires)
- Sumitomo Rubber Industries (Falken Tires)
- Hyundai Transys
- Toyoda Gosei
- Hanon Systems
- Pirelli
- LG Electronics
- Brose
- Hankook

Social Media

By 2023, global social media users are projected to reach 4.89 billion, a 10.1% increase in one year. With approximately 61% of the world's population using social media, it presents a valuable platform for automotive suppliers to share content. Our analysis examined how top automotive suppliers utilise popular social media platforms and identified brands that are not leveraging this opportunity.

"Only 37% of automotive suppliers are using social media to a good standard."

The average person spends about 2 hours and 27 minutes daily on social media, switching between seven different platforms each month. For 84% of B2B executives, social media plays a crucial role in their buying decisions. Additionally, 33% of consumers use social media to discover new products or services, and 17% seek customer support through these channels. Neglecting social media means missing out on potential customers who will turn to competitors for assistance.

Social media, mobile devices, and visual content are closely connected. Nearly all social media users (99%) access their favourite platforms through mobile devices, and video or image posts generate the highest engagement. On LinkedIn, video posts receive five times more engagement than text-only posts. YouTube, with 2 billion unique users monthly, is the second most popular search engine after Google. Automotive buyers are particularly influenced by YouTube, with 80% reporting its impact. Brands that don't regularly post on YouTube will struggle to be noticed and miss out on the SEO benefits associated with video content. Surprisingly, 18 leading global automotive supplier brands are not utilising YouTube.

In the B2B world, LinkedIn is responsible for generating 4 out of 5 leads. Unlike other social platforms, LinkedIn is specifically designed for professionals and businesses. Its targeting features, allowing for audience selection based on location, industry, and job role, are beneficial for automotive suppliers looking to connect with a specific niche. However, our research discovered that 23% of the top automotive suppliers in the world do not have a presence on LinkedIn. Interestingly, 83% of these brands that overlook LinkedIn also perform poorly in terms of overall digital maturity.

85% of the world's top automotive suppliers are using at least one social media platform, however we were surprised to find that 63% are not using this channel effectively. Our tests uncovered that even those that have a presence on the key social media channels failed to achieve high scores, with only BASF and TE Connectivity receiving full marks.

We were able to identify a clear relationship between performance in this category and overall digital effectiveness, with 9 of the 10 most digitally mature automotive supplier brands achieving a good score for social media.

"63% of automotive suppliers are not present or using social media platforms effectively."

Pos	Supplier Name	Brand Name	Score %
1	TE Connectivity	TE Connectivity	100
1	BASF	BASF	100
3	Aptiv	Motional	95
4	LG Electronics	LG Electronics	90
4	Continental	Continental	90
4	Goodyear	Goodyear	90
4	Aptiv	Aptiv	90
4	Hankook	Hankook	90
4	Cummins	Accelera	90
4	Tenneco	Tenneco	90
11	BorgWarner	Delphi Technologies	85
11	Yazaki	Yazaki North America	85
11	Schaeffler	Schaeffler	85
14	Magna	Magna	80
14	Panasonic	Panasonic North America	80
14	Michelin	Michelin UK	80
14	Autoliv	Autoliv	80
14	ZF	ZF	80
14	Sumitomo Rubber Industries	Dunlop Motorcycle Tires	80
14	Brose	Brose	80
14	Adient	Adient	80
14	Plastic Omnium	Plastic Omnium	80
14	Sumitomo Rubber Industries	Falken Tires	80
14	Yanfeng	Yanfeng	80
14	Hitachi	Hitachi	80
26	Cummins	Cummins	75
26	Faurecia	Faurecia	75
26	Mahle	Mahle	75
26	Hyundai Mobis	Hyundai Mobis	75
30	BorgWarner	BorgWarner	70
30	BorgWarner	DRiV	70
30	Dana	Dana	70
30	Panasonic	Panasonic Automotive	70
34	Benteler	Benteler	65
34	Magneti Marelli	Magneti Marelli	65
34	Catl	Catl	65
37	Pirelli	Pirelli	60
37	Bosch	Bosch	60
37	Hella	Hella	60
37	DENSO	DENSO	60
37	Bridgestone	Bridgestone	60
37	Valeo	Valeo	60
37	Dana	Spicer	60
37	Sumitomo Electric	Sumitomo Electric	60
37	Joyson Safety	Joyson Safety	60
46	Lear	Lear	55
46	Gestamp	Gestamp	55
46	ZF	BOGE	55
46	Yazaki	Yazaki Europe	55
46	Dana	Dana Aftermarket	55
51	JTEKT	JTEKT NA	50
51	Weichai Power	Weichai Power	50
51	Hyundai Transys	Hyundai Transys	50
54	ZF	SACHS	45
55	Toyota Boshoku	Toyota Boshoku	40
55	Dana	Victor Reinz	40
57	Aisin Seiki	Aisin Seiki	35
58	ZF	TRW	30
58	BorgWarner	Hartridge	30
58	Hasco	Hasco	30
58	Dana	Albarus	30
58	Hanon Systems	Hanon Systems	30
58	JTEKT	JTEKT EU	30
58	Toyoda Gosei	Toyoda Gosei	30
65	JTEKT	JTEKT Bearings	20
66	Motherson Sumi	Motherson Sumi	10
66	BorgWarner	Delco Remy	10
68	ZF	LUCAS	0
68	Dana	OpenECU	0
68	BorgWarner	BERU	0
68	BHAP	BHAP	0
68	Dana	Glaser	0
68	Dana	GWB	0
68	Dana	PIV	0
68	Dana	Transejes	0
68	Dana	Thompson	0
68	Dana	Tru-Cool	0
68	ZF	GIRLING	0
68	ZF	BRAKE	0

13 Mobile Apps

Most buying experiences start and finish on mobile devices as people smoothly transition between devices during their purchasing process. Mobile phone users spend the majority of their time on apps, and by 2027, the app market is predicted to be valued at £553.5 billion. Automotive suppliers can benefit from having their own apps to not only generate revenue but also enhance customer engagement, provide helpful product details, and streamline operations.

The automotive industry experienced a change in online sales due to the COVID-19 pandemic and customers wanting more digital interactions with brands. Now, people rely heavily on mobile devices and expect organisations to have a strong online presence. Mobile apps are a great tool for automotive suppliers to stay connected with their customers and end users. Convenience is important to today's audiences, and 66% of people use apps regularly if they make their life easier. Apps allow suppliers to assist users in using and understanding their products, building trust and loyalty. They also provide valuable data to marketers for improving performance.

Our research identified 30 customer needs to enhance satisfaction. These needs range from practical aspects like avoiding hassle and saving time to emotional factors like reducing anxiety. Neglecting the convenience and accessibility of apps means ignoring the needs of the market and risking losing customers to more customer-focused competitors.

In 2022, there were 255 billion app downloads, representing an 11% increase from 2021. For automotive suppliers aiming for digital growth, productivity, and corporate social responsibility (CSR), investing in mobile apps can be a game-changer.

Automotive audiences have a thirst for knowledge and want to be able to be able to access and manage information independently. Apps can empower employees and staff to connect with a company at their fingertips and offer convenience whilst providing meaningful data to inform improvement.

"42% of the top automotive suppliers do not have apps available."

Using customer-friendly apps is crucial for fostering and sustaining customer relationships, promoting advocacy, and gaining valuable data. Our research discovered that 49% of leading automotive suppliers are investing in mobile apps available on both Google and Apple stores. Apps offer a high return on investment and boast a conversion rate three times higher than mobile websites. Furthermore, we observed a correlation between overall digital maturity and mobile app performance, with nine out of the top ten digitally mature suppliers offering apps on both platforms.

39 App Store + Google Play

4 Google Play

3 App Store

33 No App

Pos	Supplier	Brand	Score %
1	Bosch	Bosch	100
1	DENSO	DENSO	100
1	ZF	ZF	100
1	ZF	SACHS	100
1	Magna	Magna	100
1	Hyundai Mobis	Hyundai Mobis	100
1	Continental	Continental	100
1	Aisin Seiki	Aisin Seiki	100
1	Bridgestone	Bridgestone	100
1	Hasco	Hasco	100
1	Michelin	Michelin UK	100
1	Valeo	Valeo	100
1	Tenneco	Tenneco	100
1	Faurecia	Faurecia	100
1	Goodyear	Goodyear	100
1	Weichai Power	Weichai Power	100
1	Aptiv	Aptiv	100
1	Sumitomo Electric	Sumitomo Electric	100
1	BorgWarner	BorgWarner	100
1	BorgWarner	Delphi Technologies	100
1	Adient	Adient	100
1	Mahle	Mahle	100
1	Magneti Marelli	Magneti Marelli	100
1	Yazaki	Yazaki Europe	100
1	Schaeffler	Schaeffler	100
1	Cummins	Cummins	100
1	Toyota Bo-shoku	Toyota Boshoku	100
1	Plastic Om-nium	Plastic Omnium	100
1	BASF	BASF	100

Pos	Supplier	Brand	Score %
1	Autoliv	Autoliv	100
1	Hella	Hella	100
1	Motherson Sumi	Motherson Sumi	100
1	Benteler	Benteler	100
1	TE Connectivity	TE Connectivity	100
1	Sumitomo Rubber Industries	Falken Tires	100
1	Hyundai Transys	Hyundai Transys	100
1	Pirelli	Pirelli	100
1	LG Electronics	LG Electronics	100
1	Brose	Brose	100
40	ZF	BOGE	50
40	ZF	TRW	50
40	Lear	Lear	50
40	Yazaki	Yazaki North America	50
40	Dana	Dana Aftermarket	50
40	Dana	Victor Reinz	50
40	Dana	Glaser	50
47	ZF	LUCAS	0
47	ZF	GIRLING	0
47	ZF	BRAKE	0
47	Catl	Catl	0
47	Yanfeng	Yanfeng	0
47	Aptiv	Motional	0
47	BorgWarner	DRiV	0
47	BorgWarner	Hartridge	0
47	BorgWarner	Delco Remy	0
47	BorgWarner	BERU	0
47	Hitachi	Hitachi	0

Pos	Supplier	Brand	Score %
47	Cummins	Accelera	0
47	BHAP	BHAP	0
47	Panasonic	Panasonic North America	0
47	Panasonic	Panasonic Automotive	0
47	Gestamp	Gestamp	0
47	Dana	Dana	0
47	Dana	Spicer	0
47	Dana	Albarus	0
47	Dana	OpenECU	0
47	Dana	GWB	0
47	Dana	PIV	0
47	Dana	Transejes	0
47	Dana	Thompson	0
47	Dana	Tru-Cool	0
47	JTEKT	JTEKT NA	0
47	JTEKT	JTEKT EU	0
47	JTEKT	JTEKT Bearings	0
47	Joyson Safety	Joyson Safety	0
47	Sumitomo Rubber Industries	Dunlop Motorcycle Tires	0
47	Toyoda Gosei	Toyoda Gosei	0
47	Hanon Systems	Hanon Systems	0
47	Hankook	Hankook	0

Website Platform Insights

For automotive suppliers, selecting the appropriate website platform is only one aspect of achieving success. It is equally important to ensure proper implementation and make the most out of the platform's capabilities to achieve a satisfactory return on investment. We conducted tests on the website platform investments of the leading suppliers worldwide and analysed trends related to digital effectiveness.

The world's top automotive suppliers have neglected the importance of website performance and platform selection. Our tests revealed a variety of website platforms being utilised in the industry, ranging from expensive and advanced technologies like Adobe to low-budget, open-source platforms like WordPress. However, regardless of the platform used, there was a consistent issue of poor performance in terms of user experience, loading times, and visibility in search engines.

WordPress emerged as the most popular website platform in the automotive sector, with Drupal and Adobe following closely behind. This indicates a significant contrast in investment and available sophistication. Notably, automotive supplier websites utilising Adobe showed a strong presence among the top ten performers in digital maturity, whereas WordPress sites dominated the lower end. Among the top 20, three websites were powered by Drupal. However, all Drupal and Adobe websites exhibited slow loading times and failed Google's speed tests.

In the last few years, the success of enterprise-level technology, Optimizely (formerly Episerver) has been on an upward trajectory based on an assessment by Gartner which showed it overtaking Sitecore and Acquia (Drupal). Episerver/Optimizely is a leader in the market and yet the automotive supplier websites that are using it are missing out on its potential, with no signs of personalisation and a below average performance for websites built with this calibre of technology. This demonstrates how a poor implementation or support can impact ROI.

Considering that some automotive suppliers have invested in top-tier platforms like Adobe and Episerver (Optimizely), it's disappointing to see that none of these automotive part suppliers are benefiting from their full capability.

Source: Gartner Magic Quadrant 2023

The digital maturity scores of the leading automotive suppliers were generally low, with none of them surpassing a score of 70.9%. It is clear that investing in website platforms that suit their needs and goals can bring significant benefits to suppliers. However, if the implementation is not done correctly or the platform's potential is not fully utilised, it can reduce digital effectiveness and result in lagging behind competitors.

To demonstrate how quick and easy it can be for automotive suppliers, we combined the top performing features from our study and implemented them to produce a digitally effective website. We used Optimizely, as this is regarded as a leader by Gartner. This demonstrates 'best practice' for automotive supplier websites, with features such as:

- Enhanced SEO features
- Exceptional mobile features
- AI driven personalisation
- Exceptionally for content marketing across all digital channels
- In built testing for campaign assets
- Competitive price tag
- Bulletproof security

This proof of concept is a 'must see' for any ambitious automotive organisation. If you'd like a demo, contact us today.

The Next Steps in Digital Maturity

Our research confirmed that automotive suppliers are significantly behind other sectors and even other parts of the automotive sector in digital maturity. Whilst some suppliers have taken steps towards digital transformation, there are further improvements that need to be made to bring them up to speed with the evolving digital landscape.

Failing to keep up with digital innovation poses significant risks for automotive suppliers. By neglecting the importance of digital in their customer relationships and overall organisation, they are essentially giving their competitors a major advantage.

Digital transformation is all about providing enhanced experiences for customers. The factors we have examined in this report contribute to customer trust, loyalty, and ultimately drive revenue and recruitment opportunities for companies.

By implementing these strategies, automotive marketers can adapt quickly, effectively communicate with their audience, and deliver exceptional experiences on a large scale. However, creating sophisticated, personalised customer journeys can be daunting without the necessary expertise, support, or tools.

The digital revolution is continuously progressing, and suppliers must urgently accelerate their efforts to keep pace with the rest of the industry and the broader business world.

About the author:

Ultimedia is a global digital company that has been empowering ambitious organisations, including automotive companies, for over 25 years.

Since 1995, we have been assisting organisations worldwide in realising their digital goals through strategic guidance, website development, user experience enhancements, and digital marketing. Our accreditations with renowned entities like Google, Microsoft, and Optimizely ensure that our clients receive top-tier services and expert support to propel their organisations forward.

Chief Executive Officer, Craig Johnson

Craig is one of the UK's leading digital experts, with over a quarter of a century of experience helping some of the biggest global brands to elevate their digital performance. Craig has a wealth of experience in the automotive sector and has produced multiple reports into best practice in the automotive industry specifically.

To discuss the findings of the research, learn more about the performance of a particular supplier or unlock more insights from the research please contact Craig:

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