SZENT ISTVÁN UNIVERSITY

THE LIFE CYCLE OF THE HUNGARIAN CAR DEALERSHIPS AND THE EFFECT OF THE 2008 CRISIS ON THEIR DEVELOPMENT

Thesis of Ph.D dissertation

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1. INTRODUCTION

1.1. Topicality of the subject

Justification of the choice of subject:
1. Up to the present, relatively few surveys have been conducted in Hungary on the life cycle and evolution of Hungarian enterprises. The majority of researchers analysed them from different aspects. The analysis of Salamonné at the beginning of the years 2000 can be deemed pioneer, as she uncovered, during her research, life cycles of enterprises operating in different sectors and carrying out various activities, as well as she set up a life cycle for Hungarian enterprises. Under chapter 2.3.2, I am assessing the results of Salamonné's analysis in details. I found her model set up based on this intriguing and a basis for further analyses, as altered circumstances triggered by the change of regime were some of the main motivating factors of the start-up of Hungarian enterprises, which may be considered specific and, in my opinion, made also life cycle unique compared to that of the foreign enterprises. Nearly 30 years after the change it is now appropriate to re- and further analyse whether the then uncovered specificities are still valid. Besides, whether characteristics of the life cycle of enterprises are Hungarian specificities or they feature only the given period and circumstances. Relating to this, I will marginally analyse whether a market-based operation emerged from this aspect of development.

2. Another reason of choosing this subject is that no comprehensive survey on the situation of car dealerships has been made so far in Hungary. The Hungarian Association of Automobile Dealers (GÉMOSZ) begun regularly monitor the actors of the sector following the crisis of 2008, the results of which I show in Chapter 2.5.3. During these surveys, GÉMOSZ analysed mainly the number and ratio of owners, dealers and sites and the changes occurred, but they did not conduct analyses in details and in depth. Through my research I would also like to fill this gap.

3. The third reason of my choice was that one of the biggest losers of the crisis of 2008, not only in Hungary but worldwide, was the automotive industry, therefore I analyse the effect of the crisis, recovery process and crisis management of the dealerships, as regarding this aspect there are also shortcomings amongst the Hungarian studies. In my opinion, the results can be used not only in other sectors for those who make research in similar subject, but for owners of dealerships, avoiding the drastic effects of an eventual subsequent crisis, the occurrence of which professionals of the sector do not exclude.
Automotive industry is a very specific sector, as beyond their business model, there is the supply chain strongly influenced by the manufacturer or importer, relating to which it needs to be analysed that to what extent this factor affects the competition in case of the given enterprises.

1.2. Objectives

When preparing my dissertation, I set the following objectives:

a) to compare, assess, structure the different corporate life cycle models
b) to analyse the situation of the Hungarian automotive industry
c) to explore the life cycle of Hungarian dealerships
d) to analyse the strategy of dealerships and the effect of the crisis

a) One of my goals is to compare in details, assess and structure the different corporate life cycle models, based on the foreign and Hungarian literature. Structuring overview of life cycle models appears in the research of more author analysing similar subject (see: ZSUPANEKNÉ, 2007;

KEMENCZEI, 2009; MISKOLCZI, 2012; HORVÁTH, 2016), consequently in my dissertation I focus mainly on their applicability in practice and the research results of recent years.

b) By using secondary and primary data during my research, my goal is to analyse the situation of the Hungarian automotive industry, especially the trade within the sector. By using different methods, I analyse and assess the number of dealerships, showrooms and sites, owners and new cars before, during and after the world economic crisis of 2008.

c) Furthermore, one of my aims is to analyse by own, empirical research the life cycle of Hungarian dealerships and uncover their evolution in different segments. When classifying the examined groups, I take into account the prize category on the one hand (lower segment (Suzuki) and medium category (Skoda – Toyota – Volkswagen), and the number of sites and brands of the dealerships on the other hand (one and multi brand, one and multi site dealerships).
I use the method of in-depth interview in order to explore the life cycle of dealerships.

d) Finally, my aim is to analyse the strategy of the dealerships and to uncover the effect of the crisis of 2008 on them and the most important factors in their success that led to overcome the crisis (and if possible, analyse these characteristics also in case of the enterprises that stopped their activities). For analysing the strategy, I use questionnaires.

1.3. Hypotheses and process of my research

Following to having processed Hungarian and foreign literature, and carried out preliminary interviews and research with key actors, I formulated the hypotheses below:

Hypothesis 1 (H1) – Dealerships that neglected their services at the beginning of the years 2000 and made a living mainly by sales and commission came off badly after the crisis.
Hypothesis 2 (H2) – Dealerships open further site in order to overcome the revolutionary problem of a given stage.
Hypothesis 3 (H3) – Multi brand, multi site dealerships evolved from one brand, one site dealerships, where amongst the owners of the dealerships, financial investors also appeared beside the professional ones.
Hypothesis 4 (H4) – If more showrooms operate in one dealership at one site, then those brands belong to the same group.
Hypothesis 5 (H5) – Dealerships prepare annual plan based on (importer) order, do not make plans on the long term due to the continuously changing external environment, hence they do not prepare business or strategy plan either.
Hypothesis 6 (H6) – Time of foundation affects the evolution and life stage of the Hungarian dealerships, as following to the change of regime, enterprises started their activities in a special environment without examples and experiences that resulted in specific characteristics in their development path.
Hypothesis 7 (H7) – Amongst the dealerships, those enterprises are the most competitive that distribute more brands and operate at more sites, as these trading forms have the most professional (relating to management) and economic (lower costs per sites) advantages compared to the one site dealerships.
Hypothesis 8 (H8) – One of the biggest problems of operating Hungarian dealerships while overcoming the crisis and currently as well, is the inconvenient vocational education and the lack of manpower.

Steps of preparing my dissertation and their connection can be seen on Figure 1.

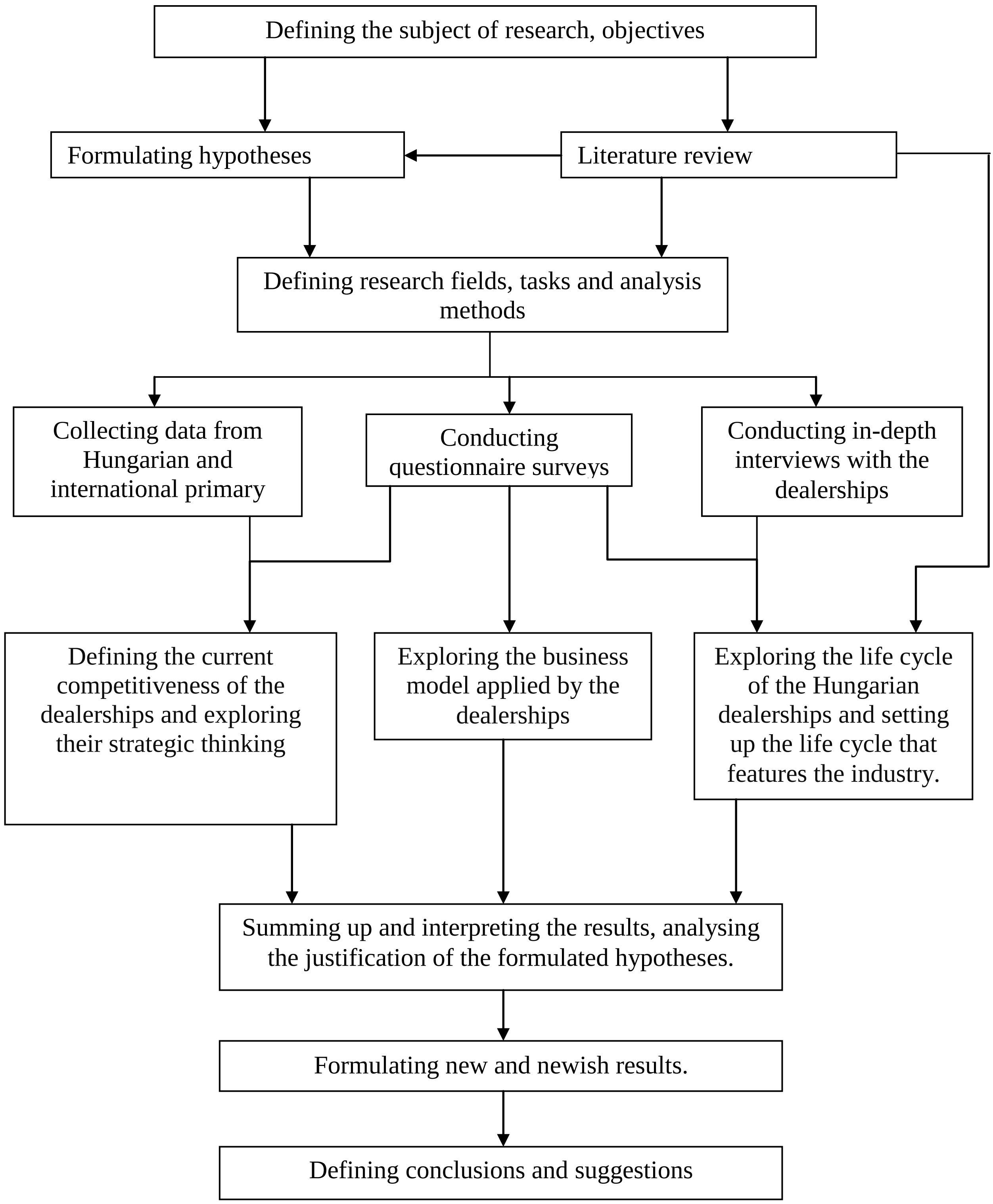

Figure 1: Flowchart of preparing the dissertation
Source: own compilation

2. MATERIAL AND METHODOLOGY

To reach my research goals, I have firstly revised the Hungarian and international literature relating to the subject, during which process I applied a comparative methodology. I compared the different Hungarian and international life cycle models and pointed out their applicability in practice as well as I assessed the research results of the last years.

While carrying out my own analysis, I conducted various, targeted primary research, following to the analysis of the secondary data.

a) I conducted structured in-depth interview to analyse the life cycle of the dealerships, during which I tried to explore the characteristics of the given life cycles and the effect of the crisis. I chose this method to gain information on a bigger scale and was intrigued to learn the opinion and experience of the owners (or managers in certain cases) and their vision regarding the industry and that of their own business. I conducted in-depth interview in case of 4 brands, namely with Skoda, Suzuki, Toyota and VW.

b) As for the other part of my research, I analysed the strategy of the dealerships and the effect of the crisis and crisis management by applying questionnaires. The questionnaire survey covered all brands and dealerships. When choosing methodology, my priority was to examine comparable and comprehensible data during the questionnaire that cover the characteristics of the given time interval.

c) To present the companies operating in Hungary, I used their publications and information available on their websites. To present and assess the Hungarian market, I used the "production line" primary databases provided by GÉMOSZ and Datahouse Kft.. Besides, I had the opportunity to interview Mr Gábor Gablini, president of GÉMOSZ several times, and I also used materials, data and information offered by him during my analyses.

In my dissertation, I divided dealerships into 4 categories depending on the number of brand the enterprise deals with and the number of site they operate at. The categories are the following:

- 1 site 1 brand (henceforward: 1S 1B)
- 1 site multi brand (1S mB)
- Multi site 1 brand (mS 1B)
- Multi site multi brand (mS mB)

I conducted in-depth interviews to examine life cycle and development of dealerships. Firstly, I filtered the Hungarian dealerships based on two factors. Hence, dealerships of owners with one brand, one site were included into the sample used for the in-depth interview. I carried out this filtering since I thought that comparison regarding life cycle of dealerships should be made in case of enterprises that have similar operational background. And out of the brands, I focused on four of them, namely on Skoda, Suzuki, Toyota and Volkswagen.
Choosing those brands had several reasons:

- On the one hand, I intended to uncover whether there is a difference in the life cycle and strategy of brands operating in different market segments. This is why I chose brands from lower and medium category as well.
- On the other hand I was intrigued to know whether there is a difference in the strategy used by the dealerships or they can be traced back to the country of production. For this reason, I chose dealerships distributing European and Asian brand as well, for my in-depth interviews.

- The third reason of choosing these brands is that they were among the best-seller cars (also) in recent years. Besides being “Way of Life”, Suzuki was atop sales charts for years. And additionally to Opel and Ford, the other brands are also listed at the top each year. (Figure 2) Although it is excluded from the top 5, Toyota is the most reliable brand, one of the biggest manufacturers of the world and one of the most valuable companies, therefore I chose to examine it as well.
- Moreover, being atop the sales charts, the number of dealerships of these brands are significant on a country-wide basis that also justified my choice.

Finally, there are two external factors that affected my choice:
- Brands of premium category typically have only one or a few showrooms, generally belong to a bigger company or group of companies, hence I thought their life cycle cannot be classified and the already many external factors do not allow them to go along on a unique path.
- The other reason that these enterprises or dealerships distributing other brands as well in many cases but not belonging to the premium category, were not responsive, they did not even react to my request.

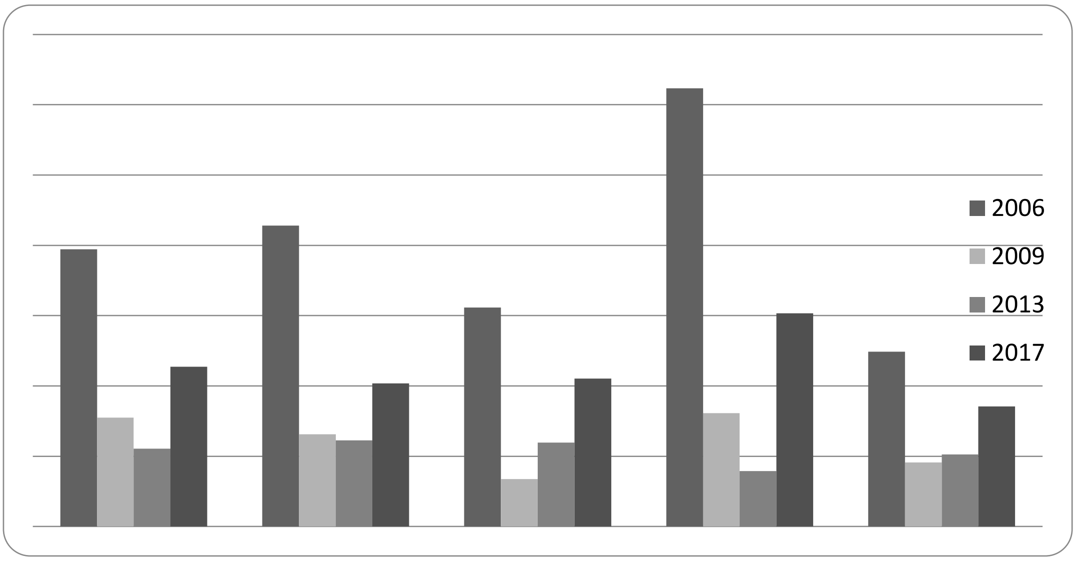

Figure 2: Number of car annually sold by the top 5 brands
Source: own edition based on the database of Datahouse Ltd.

At the beginning of the research, in 2015, there were 405 dealerships in operation in Hungary, out of which 137 were one brand and 168 one site dealerships. Amongst them, there were 112 one brand and one site dealership. I indicate the number of examined brands in Table 1.

Table 1: The number of dealerships and their breakdown in case of the examined brands

	1 site 1 brand	multi site 1 brand	1 site multi brand	multi site multi brand	Total
Suzuki	31	17 (7 owners)	4	22	74
Skoda	13	2 (1 owner)	12	12	39
Toyota	3	14 (7 owners)	2	11	30
Volkswagen	5	0	11	14	30

Source: own edition based on the 2015 data of GÉMOSZ

Based on the figures of Table 1, it can be seen that nearly half (52) of the 112 one brand one site dealerships belong to the 4 examined brands.
Following to phone and email requests, I managed in-depth interviews with the owner and/or manager of 18 dealerships in the first round, and these were all one brand and one site dealerships.
Reaching the owners of dealerships was challenging, the level of responsiveness was low, even if I was supported by importers and by the Association as well. Many of them did not even react on my requests and in several cases direct contact did not lead to results either.
While I could reach all one brand one site dealerships of Toyota (3 owners/managers) and VW (5 owners/managers), in case of Skoda this ratio is only 30% that means 4 dealerships, and 20% in case of Suzuki (meaning 6 dealerships), but their ratio amongst the one brand dealerships is also the highest.
I intended to explore and analyse the dealerships based on the life cycle model of Adizes. I took into account the unique characteristics and features of the life cycles, and based on this, I attempted to identify the given life cycles and define the sector-specific life cycle.
The questions of the in-depth interview were defined in line with the given stages of the Adizes life cycle. The main categories of questions that I raised to the owners:

- Basic data regarding the enterprise;
- Opportunity, idea, aim of the owner by opening the dealerships;
- Initial tasks;
- Problems of the start and first years, difficulties and solutions;
- The tasks of dynamic growth, problems and solutions;
- Formalization of dealerships;
- Evolution and growth of dealerships (distributing more brands or opening more sites) and the related tasks, benefits - disadvantages;
- Effect of the importer (factory) on the activity and management of the enterprise;
- The effect of the crisis and steps and means of recovery;
- Current state, tasks and problems;
- Future goals, tasks;

The next step of my research was to extend the analysis of life cycle within Suzuki brand from one brand dealerships to multi brand multi site dealerships. My aim was to see whether the life cycle of dealerships change, if yes, to what extent and how, if the owner deals with more brands or operate at more sites. Then, following to the in-depth interviews, I tried to reach the managers

of the other brands as well. In this case, I could personally consult with 3 managers, but they cannot be clearly categorised according to the above mentioned (Table 1), as there are overlaps. The three enterprises operate at 3, 5 and 4 sites and deal with 4, 3 and 9 brands respectively, amongst which we can find Suzuki, Skoda, Toyota and Volkswagen as well.
I elaborated the results of the in-depth interview and analysis of the life cycles as a case study.
I also attempted to reach the owners of dealerships that closed business after or due to the crisis, but unfortunately they were not at all open for cooperation, I could only get information in an indirect way from the ex-concurrences.

The third method of my research is the questionnaire survey. With this, I conducted research not only on the life cycle and strategy of dealerships, but on the applied business models, as well as I tried to explore the factors affecting their competitiveness, the role of importer and the effect of the crisis. After the demographic data, in the first part I raised questions on the location of the dealerships, the number of sites and brands and the ownership, I intended to explore the advantages, disadvantages and problems stem from these. The other part of the questionnaire covered the competitiveness and strategy of the dealerships and the effect of the crisis. Besides the time interval, objective, reason and result of the planning, I asked them about manager and employee trainings, the means of recovery and fields connecting to more parts of the business model, such as the role of maintaining contact with customers, communication and internet, as well as the evolution of the ratio of costs.
After compiling the questions, I conducted a pilot survey. Following to the feedbacks, I had the opportunity to personally consult with Mr Gábor Gablini on the questions from a professional aspect, due to which the questionnaire could be finalised in terms of form and content. In the pilot questionnaire there were also questions regarding the life cycle of the dealerships, as I intended to examine this subject as well, but after the feedbacks, these questions were taken out, since they very much lengthened the completion of the questionnaire that led to a risk of low level of responsiveness which would not suffice to my analyses.
The questionnaires were sent to all 405 dealerships of the country, therefore I deem these dealerships as population to my survey.
The questionnaire was distributed with the support of the Hungarian Association of Automotive Dealers. The questionnaire was distributed by the Association based on two mailing list, a member list and a dealer newsletter respectively. The questionnaire was available on the online-kerdoiv.com site. Since the ratio of completion was very low after two weeks, the Association sent reminders, I contacted the dealerships via phone and started to deliver the paper-based questionnaires personally to the dealerships. By this however, the sample became distorted a bit, as paper-based questionnaires were delivered in Pest county, while I contacted those dealerships via phone, where previously had managed in-depth interviews.
Eventually, I could have 60 questionnaires filled in that is 15% of the dealerships.
Unfortunately, I have not had the chance to raise questions on concrete brand(s) distributed by the dealerships, as the questionnaire was anonymous and based on the brands, dealership could have been identified in many cases, given that I asked about their location, the number of brand and site. From the aspect of my research, I considered more important to be able to identify and classify the dealerships based on these latter factors.

The objectives phrased in the dissertation, the related hypotheses and materials and methodology necessary to achieve the goals are summarized in Table 2.

Table 2: Materials and methodology supporting the reach of objectives defined in the dissertation

Objective	Hypothesis	Material	Method
1. Targeted and analysing assessment of Hungarian and international life cycle models (in terms of their applicability)		▪ Hungarian and international literature	▪ Analysis of literature ▪ Comparative analysis
2. Presentation, analysis and assessment of the Hungarian car market	▪ H1 ▪ H4	▪ Hungarian literature ▪ GÉMOSZ database (2011-2017) ▪ Database of Datahouse Kft (between 2006-2017)	▪ Analysis of literature ▪ Comparative analysis ▪ Statistical analyses (correspondence analysis)
3. Modelling the life cycle of Hungarian one brand dealerships (Skoda, Suzuki, Toyota, VW)	▪ H6	▪ References ▪ In-depth interviews conducted with the owners of dealerships	▪ Analysis of literature ▪ Comparative analysis with Adizes model
4. Exploring life cycle of Hungarian dealerships with multi brand and/or multi site	▪ H2 ▪ H3 ▪ H6	▪ References ▪ In-depth interviews conducted with the owners and managers of dealerships	▪ Analysis of literature ▪ Comparative analysis with Adizes model
5. Exploring strategy, business model, competitiveness and crisis management of Hungarian dealerships	▪ H5 ▪ H7 ▪ H8	▪ References ▪ Own database as result of a (2018) questionnaire survey	▪ Analysis of literature ▪ Statistical analyses (cross-tabulation analyses, nonparametric tests, cluster analysis, analysis of variance)

Source: own edition

3. RESULTS

With the help of the “production line” primary database provided by GÉMOSZ, I conducted correspondence analysis even before starting the in-depth interviews, by which my aim was to support the 4th hypothesis, that is: If more showrooms operate in one dealership, at one site, then those brands belong to the same group.

While examining this, I looked for the answer to two questions:

1. Can we define regarding the brands examined during the in-depth interviews whether they are one or multi brand and one or multi site dealerships. In my opinion, dealerships of lower categories start in general as family businesses and did not aim at growing and expanding on a large-scale, neither did they aim at involving more brands, as living was a primary aspect when opening the dealership. Therefore they did not aspire, and presumably they did not have the chance either to start selling further brands at the existing sites or opening new sites for new or already existing brands.
2. If the given dealership distributes more brands, do the distributed brands belong to the same group of company? In such a sector as automotive industry, where the importer and/or the factory highly affect the possibilities and steps of the dealership, I think that it is not allowed to open concurrence brand within the site, while co-brands can only belong to the same group of company.

With the answers to the above questions I intended to help the assessment of results of my later analyses.

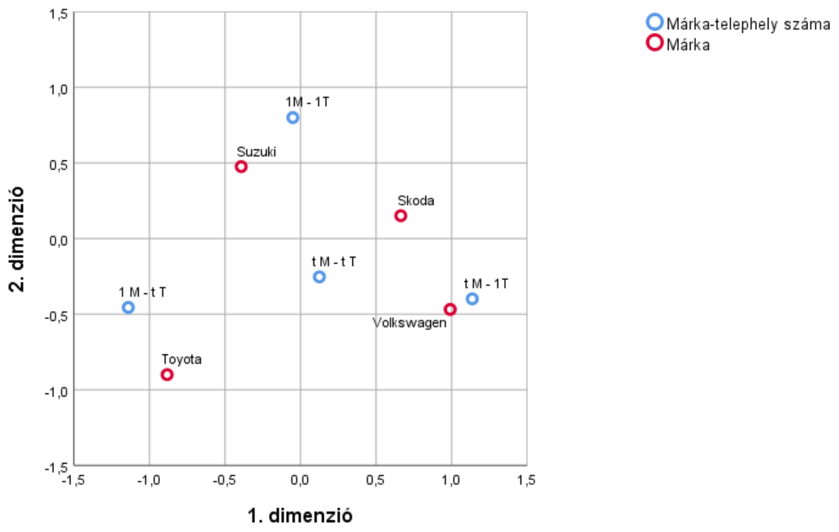

Figure 3: Correspondence map: Number of brands and sites in case of the examined brands
Source: own analysis

Evolution of the number of brands and sites of dealerships in case of the brands examined can be seen on Figure 3, as a result of a correspondence analysis, and shows features as follows:
In case of Suzuki, dealerships with mainly one brand and one site can be observed, while Volkswagen runs typically multi brand and one site dealerships. As for Volkswagen, this evolved presumably due to the brand group, that is they have fewer sites but multi brand within the dealerships.
Toyota is rather a one brand, multi site brand, while in case of Skoda, it cannot be clearly determined, it is featured by a completely mixed situation.

As in case of VW, multi brand dealerships were present in the highest number, I conducted a correspondence analysis also to see that which brands are mixed in multi brands dealerships at a given site. On Figure 4, it can be seen that Volkswagen is located at the same site as Audi and Skoda, Toyota shares site with Renault, Dacia and Mazda, Suzuki is with Fiat and Peugeot, meanwhile Skoda has common site with Honda and Volkswagen. Based on these, we can indeed claim that in case of Volkswagen, showrooms are open in dealerships within brand groups, while in other cases we cannot state this based on the results, as for example in case of Suzuki, French and Italian co-brands can also be found within one site.

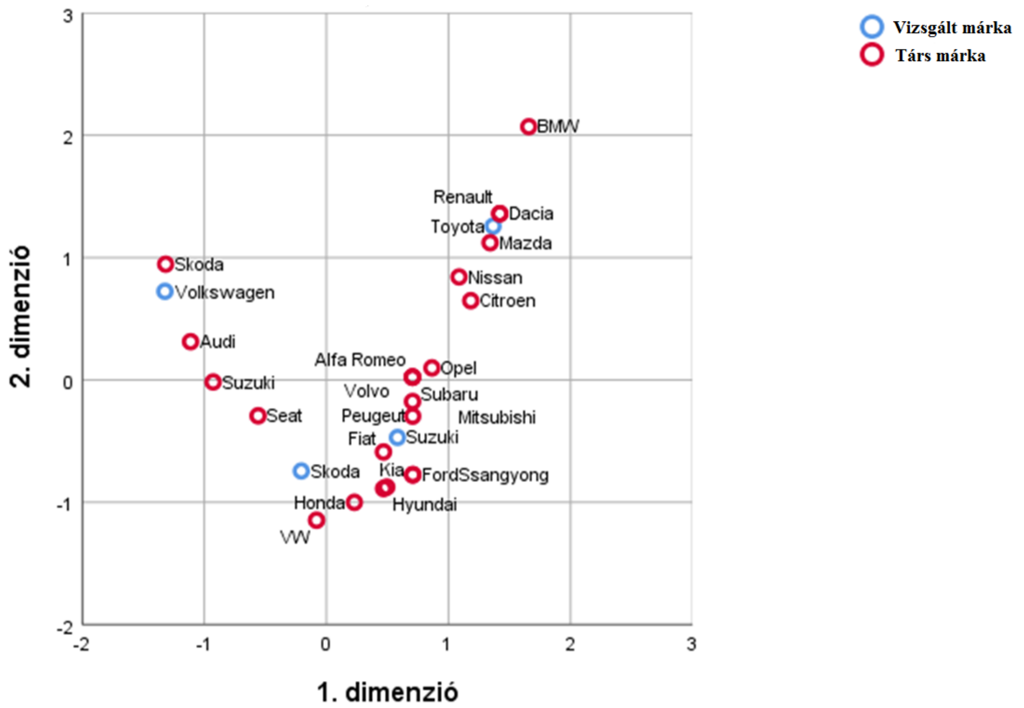

Figure 4: Correspondence map: The appearance of examined brands and co-brands that are sold at the same site

Source: own analysis

3.1. Analysing the life cycle of dealerships

During the in-depth interviews, I could identify the following 4 different, blurred and overlapped stages amongst Adizes' stages:

1. Courtship and start
2. Infancy, but partly formalized operation
3. Go-go stage with characteristics of adolescence
4. Stages after the crisis

During the in-depth interviews, my aim was to examine not only the life cycle of the enterprises, but to uncover those differences that can be observed in life cycle of dealerships from lower and higher prize categories, and based on these I intended to demonstrate the eventually different carrier paths lines as well.

During my research, I uncovered the differences below in case of dealerships of brands distributed in various segments:

1. *Appearance of financial investors*
2. *More owners*
3. *Higher number of employees*
4. *"Higher" importer expectations (e.g. coherent image, website, showroom)*

It can also be mentioned as a difference that the artificial increasing of demand of the years 2000 did not raise sales to unrealistic highness, as they sold fewer (or nothing) with 0 HUF initial payment, but their sales also fell as a result of the crisis.

Afterwards, I attempted to uncover that if the owner involves further brands and/or open sites in addition to the already operating one, what influence this has on life cycle. Can they move to a higher stage on the growth path or the same stages appear with different characteristics? To this end, I contacted dealerships distributing also Suzuki brand, but in this case, I conducted interview with the leader of the given sites or the managers instead of the owners. The enterprises examined this way and dealing (also) with car trading show similarities in many aspects, meanwhile significant differences also appear not only regarding life cycle. After 2008, these companies felt the decline of sales and some had to even realize reduction of the number of employees or closure of site. However, all in all we can see that comparing to other (one brand, one site) dealerships , purchaser ratio is better, in more cases they managed to stay profitable throughout the crisis and there have even been companies that could open new showrooms and sites.

During my examination, I attempted to prepare the life cycle model of dealerships based on the results. Although the starting point of my research was the life cycle model of Adizes, it can be observed that due to the specificities mentioned, a completely unique life cycle can be drawn. (Figure 5) For this reason, when analysing and assessing the given stages, I did not compare to the model of Adizes, as uniqueness of the life cycle of these enterprises could already be seen at the very beginning.

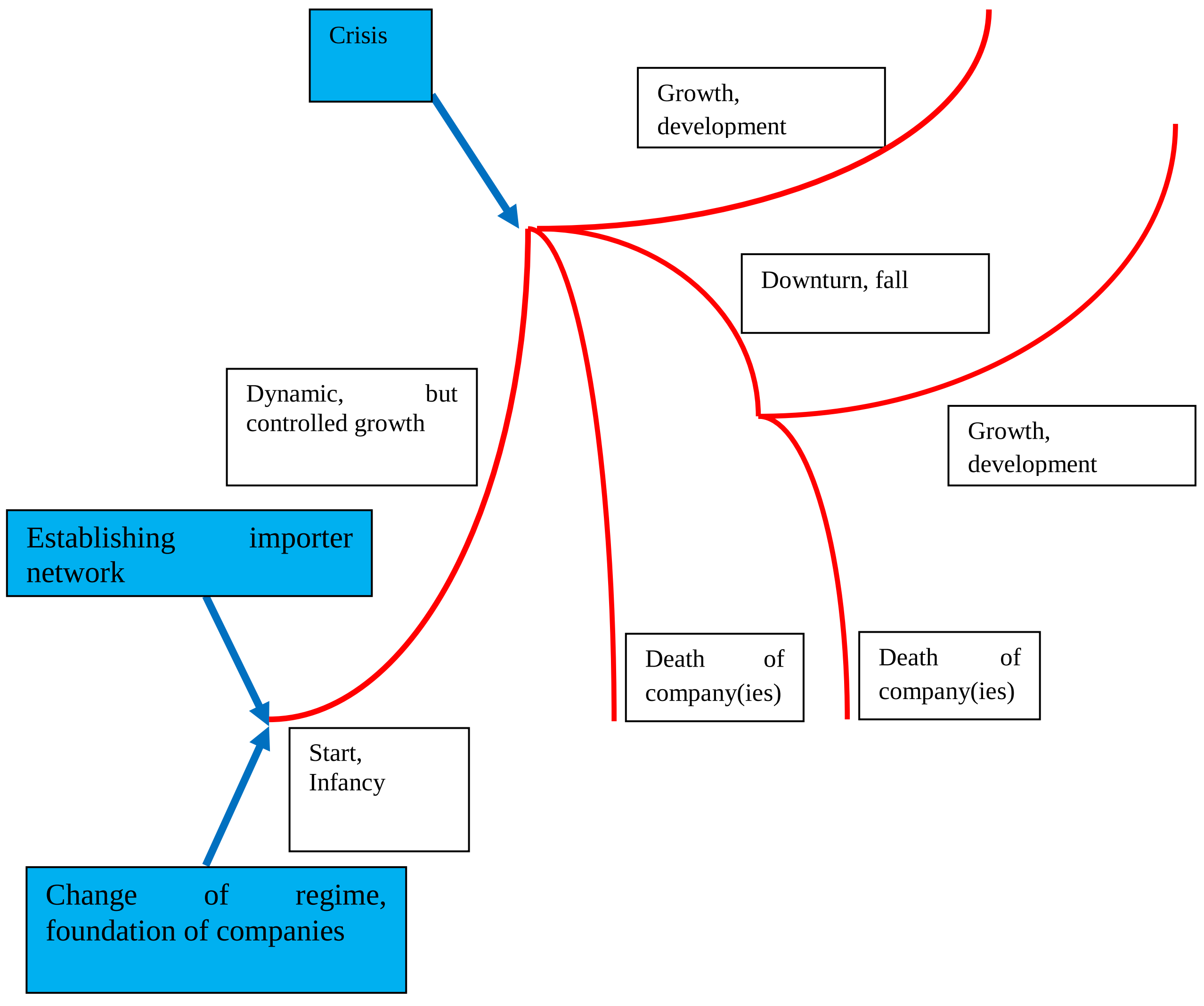

Figure 5: Life cycle of the examined dealerships
Source: own analysis

3.2. Analysing the result of the questionnaires on the strategy of dealerships and the effect of the crisis

Out of the 405 questionnaires that had been sent out (this also means the population in my research), 60 questionnaires were sent back, out of which more than 60% were completed by the owner and approximately half of these (19 person) are the leader of the dealership as well. The number of completed questionnaires do not however suffice in terms of quantity to give a result that can be expanded to the population. Still, it is 15% of all the dealerships.

During the in-depth interviews, all owners reported on significant, even 90% of fall in new car sales after the crisis. Therefore, in the questionnaire I asked them about the highest annual sales quantity before the crisis and the lowest quantity after the crisis. I was intrigued to know whether this fall and the extent of fall can also be experienced in case of the ones who completed the questionnaire. To examine this, I conducted a Wilcoxon-test. Out of 60 person, 57 answered this question, all of them indicated a decreasing number of sold pieces. According to the result of the test, this difference is significant ($p<0.05$) between the highest and lowest quantity of sales.

During the in-depth interviews, I found that owners of dealerships dealing with one brand were active in the sector even before establishing the dealership and were mainly in family businesses. I examined with cross-tabulation and chi-squared test whether there is a correspondence between the number of brand and site, as well as whether the owner, founder is a professional or financial investor. According to my assumptions, there are more financial investors amongst the founders of multi brand or multi site dealerships, while in my opinion, owners of the one brand one site dealerships have mostly professional background.

Table 3: Analysing correspondence between the number of sites and ratio of financial investors

		financial investor		
		there is no financial investor	**there is a financial investor**	in total
one site	Counts	10	5	15
	%	66.7%	33.3%	100.0%
	Adjusted residue	0.0	0.0	
multi site	Count	14	7	21
	%	66.7%	33.3%	100.0%
	Adjusted residue	0.0	0.0	
in total	Counts	24	12	36
	%	66.7%	33.3%	100.0%

Source: own analysis

It can be seen based on Table 3 and can be supported by the result of the test that there is no correspondence between the two factors that is it cannot be justified and demonstrated statistically that in case of opening more sites the ratio of financial investors increase. By all means, this result is interesting and can constitute the basis for further analyses to know why this sector is not attractive for financial investors.

When examining the strategy of dealerships, in the questionnaire I asked leaders whether they have only professional (sector-specific) qualification or - besides having professional background - they are economic experts as well (or maybe only the latter). 23% of the responders have only professional qualification and more than three quarters of them have economic qualification. I examined by chi-squared test whether it can be demonstrated statistically that those who have economic qualification, have also defined goals and strategy on the long-term. I conducted the test regarding all possible answers that is planning can be observed in case of those who have only professional, only economic or both qualification, that is:

- they have defined vision for the future;
- there is formalized strategic plan;
- they have annual business plan;
- or the current situation does not allow it.

The result of the tests however proved that correspondence cannot be demonstrated between these factors in any case, with 10% margin of error either.

As a next step, I attempted to support the correspondence with statistical test not between qualifications, but between the owner/manager taking continuously part in trainings, conferences and strategy. It can be established based on the cross-tabulation test that although the sample is small, those who regularly participate in courses, trainings, have vision for the future, strategy and annual business plan in higher ratio. On a 10% margin of error only the vision for future can be showed statistically, hence it can be expanded to the population, that is owners and/or managers regularly participating in manager trainings have vision for the future in higher ration, but it cannot be demonstrated statistically whether they have strategy or annual business plan.

When asking them why do dealerships prepare strategy and/or annual plan, whose expectation they want to meet, I received the following answers: 70% of them, that is 42 dealerships, responded that they do it due to importer expectation. Further responses and their ratio can be seen on Figure 6. It can be observed that more than half of the responders also marked owner expectation and increasing competitiveness. 13 of them felt the need to prepare a strategic plan for recovery after the crisis. In my opinion, this ratio is relatively low because most of the enterprises have experienced upswing in the last few years after downturn after the crisis.

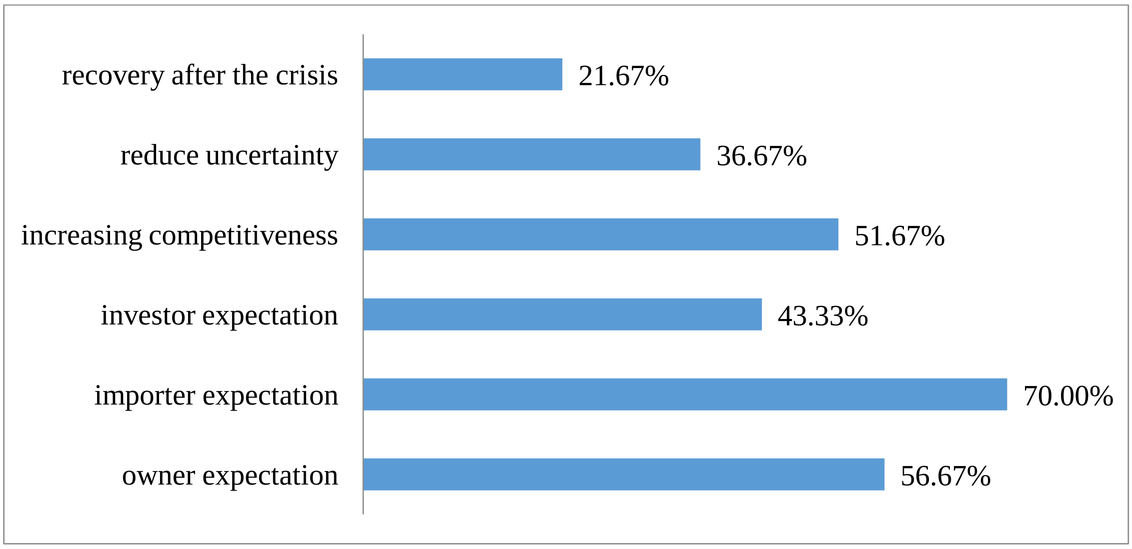

Figure 6: Reasons behind preparing strategic and/or annual business plan
Source: own analysis

During the in-depth interviews, owners mentioned that most of them deal with planning only due to the importers and that nowadays, in current economic situation one cannot realistically plan. This is somewhat controversial, as there were only 8 persons who answered in the questionnaire that "the current situation does not allow to pursue strategy on longer term". Afterwards, based on my in-depth interview experiences, I took out the answers that suggested that dealerships prepare strategic or annual business plan because it is obligatory, or based on order by the manager, importer or owner and I checked how these ratios evolve when there is no expectation. With this filter and conditions there remained only 5 dealerships out of 60. These result might correspond with the fact that in Hungary strategic thinking is not general at dealerships. Only few of the dealers and owners think consciously on the long term, from the aspect of the future of the dealership and planning, without external pressure.
At the same time, 52 dealerships, that is nearly 90% of the responders answered that they could reach the goals set in recent years mostly or completely and 8 of them answered partly or not at all. When asking them what they think the reason of lack of realization of goals is, most of them answered the growing competition and the increasingly strict importer regulations.

By using the cross-tabulation method, I examined whether there is a correspondence between the number of site and brand of dealerships and realization of goals. To this end, I applied the already used 4 groups and merging. One of the groups consists of 1B 1S, the other consists of 1B mS, mB 1S and mB mS. According to my assumption, goals of one brand one site dealerships can be realized more easily due to the simpler organisation, smaller apparatus and fewer tasks. To support this, I conducted a Mann-Whitney test (Table 4).

Table 4: Goals to reach and their realization in case of one and multi brand and site dealerships

		Number of case	Average of rank numbers	Total of rank numbers
Realization of goals	1 brand 1 site	16	38.22	611.50
	not 1 brand 1 site	44	27.69	1218.50
	In total	60		
Mann-Whitney U	228.500			
Wilcoxon W	1218.500			
Z	-2.362			
Significance level	0.018			

Source: own analysis

Despite my expectations, it can be seen based on the statistical test that dealerships that operated at multi sites and/or dealt not only with one brand were more satisfied with the goals to reach. The reason of this might be the decreasing risk and bigger safety of multi brand and/or site that I examine in question 23, as well as the increasing market opportunities.

Afterwards, I examined whether there is a difference regarding the number of brands the enterprise deals with, that is whether brand will be an influencer factor in the question analysed beforehand, or this will be only and exclusively the increasing number of site that leads to bigger satisfaction regarding the realization of goals. Based on the chi-squared test, the number of brands is not an influencer factor that is there is no correspondence between these variants. Based on the results, it can be established that the site will be an influencer factor.

Afterwards, I examined with the Kruskal-Wallis non-parametric test whether significant difference can be demonstrated between the types of dealerships created based on the number of sites and brands regarding the realization of goals. (Table 5)

Table 5: The Kruskal-Wallis test

Type		Number of case	Average of rank numbers
Goals have been reached	1S 1B	16	38.22
	1S mM	10	18.90
	mS 1B	11	29.77
	mS mB	23	30.52
	Total	60	
Kruskal-Wallis H	9.895		
Degrees of freedom	3		
Significance level	0.019		

Source: own analysis

The Kruskal-Wallis test justified the correspondence ($p<0,05$) between the type of dealership and realization of goals that is realization of goals will be different depending on the number of brands and sites.
As the result of the Kruskal-Wallis test was significant, I chose the Dunn-Bonferroni post-hoc test to demonstrate statistically the deviation between groups.

Table 6: Result of the Dunn-Bonferroni post-hoc test

Reaching the goals according to dealership categories	Group	
	1	2
1S mB	18.9	
mS 1B	29.8	29.8
mS mB	30.5	30.5
1S 1B		38.2
p-value[1]	,085	,180

Source: own edition

Average rank numbers can be found in the coloured cells of Table 6. There is no significant difference between average rank number belonging to the same group (marked with the same colour) and same line (the result of post-hoc test is not significant, $p>0,05$).
Lower group number is equivalent to lower, the higher number is equivalent to higher average rank number. Lower average rank number means that representatives of the examined dealership types believe their goals have been realized in bigger ratio, that is one site multi brand dealerships benefited most (among the 4 groups). In terms of stability they show advantage

[1] P-value belonging to the deviation between groups (types of dealerships) being in the same column (Kruskal-Wallis test).

compared to other dealerships. Those, whose activities are diversified, their clientèle strengthens their safety in terms of sales, meanwhile it is still a clear and more easily manageable organisation. When they expand their sales to other sites, drawback stemming from this deteriorate the advantages of distributing other brands.

I conducted cluster analysis to see how the examined dealerships can be classified based on their strategy.
I used hierarchic dendrogram to define the number of groups. Based on the dendrogram, I found that establishment of 3 clusters would be convenient. Afterwards, I applied a non hierarchic cluster analysing method, the k-means algorithm. By the analysis, my aim was not to categorise dealerships but to establish homogeneous groups that I can use for further examination.
25 dealerships were added to the first group, 13 to the second and 12 to the third group. Although the sample is not big, having 3 groups is still necessary, as there are differences between the groups and it would not suffice to define only two groups. At the same time, results show that clusters cannot be sharply and clearly separated.
The two types of cluster analyses led to similar results that are supported by the cross tabulation analysis (Table 7).

Table 7: Cross tabulation analysis to compare the results of the different cluster analysis methods

		Clusters resulted from the k-means method			
		1	**2**	**3**	**In total**
Clusters resulted from the Ward method	**1**	20	0	0	20
	2	5	13	0	18
	3	0	0	12	12
In total		25	13	12	50

Source: own analysis

I named the created three clusters based on their characteristics, referring to the strategic thinking of dealerships of the given groups.

Cluster 1: Ambitious, open-minded, planner
Cluster 2: Lucky survivor
Cluster 3: Consciously seeker

Cluster 1: Ambitious, open-minded, planner
Strategic thinking features these dealerships in particular, as they have defined goals and plans to reach, and most of the employees are aware of these. To survive the crisis, they grabbed external opportunities as well, for example they involved new owner to the company and applied re-export as well.
Cluster 2: Lucky survivor
It can be said about these enterprises that in their opinion the current situation do not allow to plan and pursue long term strategy. The organisations are the less formalized and management is featured mostly by personal decisions, meanwhile only one third of the owners take part in training, conferences.
Cluster 3: Consciously seeker
Dealerships added to this group are featured the most with defined vision for the future, but they do not have strategic plan, how is unclear for them. They mostly take personal decisions, but use external consultation services as well.

Following to the onset of the global economic crisis in 2008, the number of showrooms dropped by almost 40%, therefore I examined those characteristics and activities that helped in and contributed to the survival of this period for the companies that succeeded to maintain their activities. Ratios of measures chosen are indicated on Figure 7. It can be seen that approximately 90% of the respondents marked good financial management as a characteristic that helped to survive the crisis, but 75% of them also considered good customer service important.

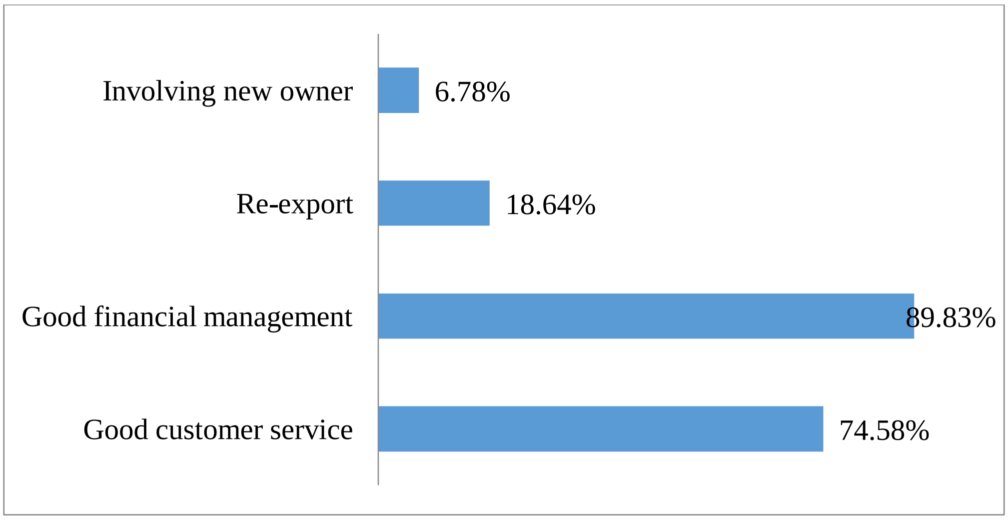

Figure 7: Characteristics and activities that facilitated survival of the crisis.
Source: own analysis

During the questionnaire I asked owners/managers of the dealerships what they think a general industrial shortcoming can be and what features only similar dealerships.
Ratios of measures chosen show similar characteristics in both cases, which can be seen on Figure 8. Most of them marked the inappropriate management, followed by the advance use of dividend. Almost 50% of the repliers said that inconvenient customer service and young age of the dealership are to be blamed for that the enterprises have not survived this period.

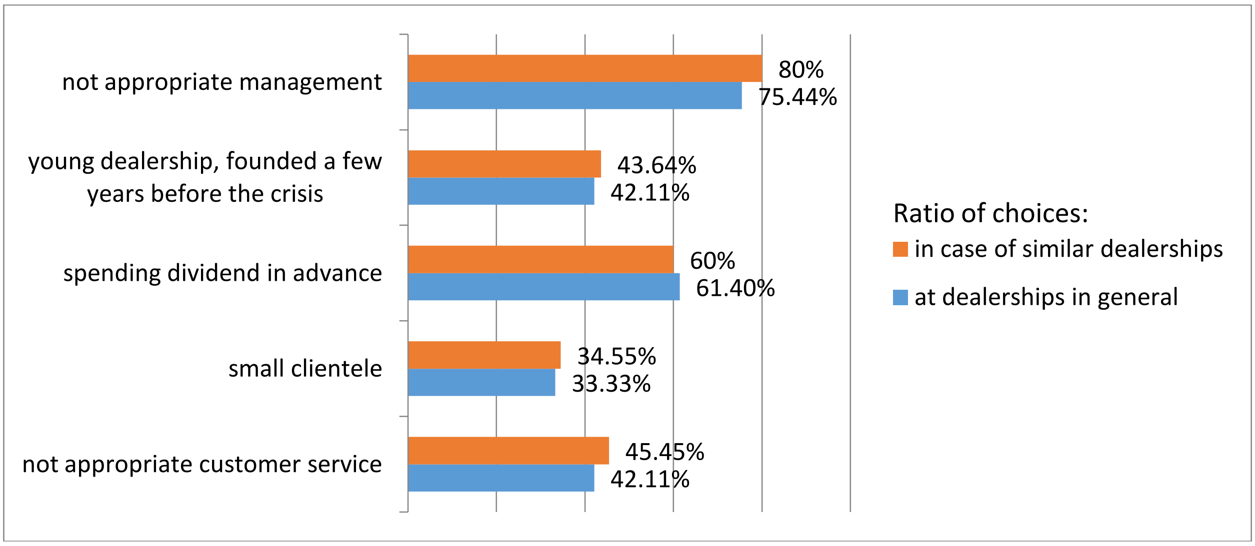

Figure 8: Characteristics and reasons beyond the closure of dealerships following to the crisis
Source: own analysis

Due to the showroom opening programme there have been many dealerships at the beginning of the years 2000, however they did not have proper professional or financial background, they mostly focused on sales, hence after the onset of the global economic crisis they have not had the strength, experience, circle of clientèle and past to survive.

During my research I also examined that according to the dealerships what are the risk factors that may negatively influence the industry and competitiveness of the enterprises. I asked them to weight these on a 1-5 scale from insignificant to the most relevant one. (Figure 9)

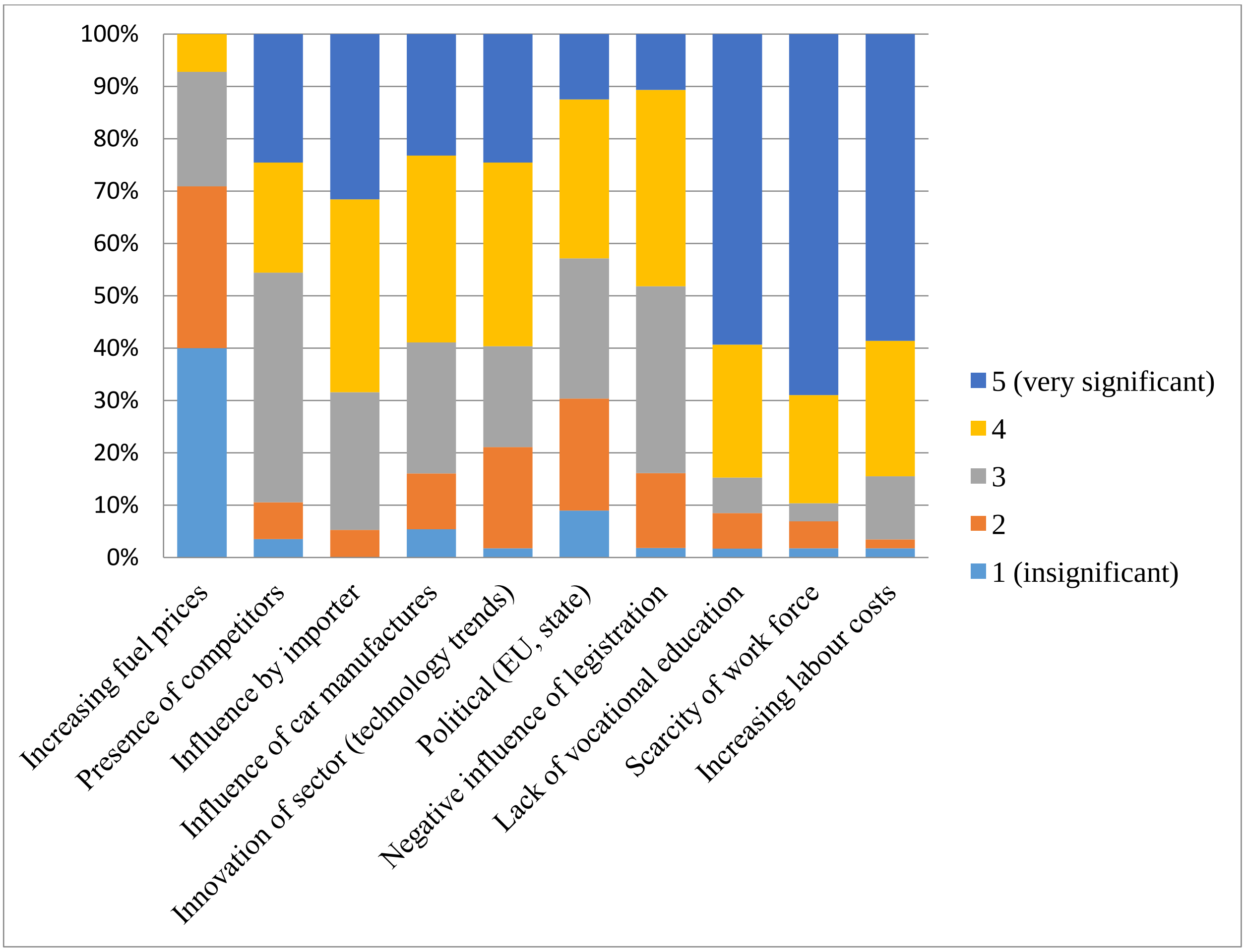

Figure 9: Percentage ratio of relevance of risk factors in the sector
Source: own analysis

We can see on Figure 9, which supports also the findings of the in-depth interviews, that managers and owners of the dealerships consider workforce-related factors the riskiest, i.e. scarce human resources, the lack of vocational education and the growing labour costs. 60-70% of the responder owners and/or managers mentioned these factors as the riskiest sources. This trio is followed by the importer influence that was also mentioned by everyone during the in-depth interviews regardless the brand, site, owner, manager.

As a consequence of changes in the sector examined and especially in trade, I found it justified to analyse the competitiveness of dealerships and how they see their own situation, to what extent they consider themselves competitive comparing to their concurrence.

During analysing and assessing the results, I used the 4 groups that I earlier defined and applied. Results of the descriptive statistics regarding the 4 groups are indicated in Table 8.

Table 8: Results of examination of competitiveness of groups set up from the examined dealerships

Type		Number of case		Average	Median	Modus	Dispersion
		Valid	Missing				
Competitiveness compared to the strongest concurrence (1-5)	1S 1B	16	0	3.8	4.0	4.0	0.57
	1S mB	10	0	**4.8**	5.0	5.0	0.23
	mS 1B	11	0	4.2	4.4	5.0	0.66
	mS mB	23	0	4.2	4.4	4.5	0.56
Current competitiveness of the dealership (1-5)	1S 1B	16	0	3.4	3.5	4.0	0.87
	1S mB	10	0	**4.6**	4.9	5.0	0.50
	mS 1B	11	0	4.0	4.0	4.0	0.72
	mS mB	23	0	3.9	4.0	4.0	0.77
Competitiveness (1-5) measured based on questions 27-28	1S 1B	16	0	3.7	3.6	3.4	0.42
	1S mB	10	0	**4.7**	4.8	5.0	0.27
	mS 1B	11	0	4.2	4.1	4.1	0.53
	mS mB	23	0	4.1	4.1	4.5	0.50

Source: own analysis

We can see in Table 8 that in all three cases, that is competitiveness assessed based on the measurements compared to the strongest concurrence, the current and consolidated ones, one site, multi brand dealerships are the most competitive.
Following to this, I carried out a variance analysis to see whether significant deviation can be justified between these averages, the results can be seen in Table 9.

Table 9: Result of variance analysis

ANOVA						
		Squared deviation	Degrees of freedom	Standard deviation	F	Significance
Competitiveness compared to the strongest concurrence (1-5)	Between groups	5.872	3	1.957	6.644	0.001
	Within group	16.496	56	0.295		
	In total	22.367	59			
Current competitiveness of the dealership (1-5)	Between groups	8.802	3	2.934	5.206	0.003
	Within group	31.560	56	0.564		
	In total	40.362	59			
Competitiveness (1-5) measured based on questions 27-28	Between groups	6.829	3	2.276	10.933	0.000
	Within group	11.660	56	0.208		
	In total	18.489	59			

Source: own analysis

Based on the strongly significant (p<0,01) result of the variance analysis, significant deviation can be justified between the group averages in all three cases.
In case of the significant result of the F-test, in order to define groups showing significant deviation, I also used the Tukey-type HSD, real significant difference post-hoc test. The result of this can be seen in Table 10.

The result of the post-hoc test supported that in case of competitiveness compared to the strongest concurrence, the current competitiveness of the dealership and competitiveness measured collectively, one site multi brand dealerships are the most competitive.

During the in-depth interviews, managers of the dealerships highlighted more benefits of sales activities at multiple sites. At the same time, the result of the questionnaire survey shows that benefits due to multi site activities are not sufficient for the owners to expand and develop their activities in such direction.

Table 10: Result of the Tukey-type HSD post-hoc test

Competitiveness compared to the strongest concurrence			
Type	Number of case	1	2
1S 1B	16	3.8	
mS mB	23	4.2	
mS 1B	11	4.2	
1S mB	10		4.8
Sig.		0.231	1.000

Current competitiveness of the dealership			
Type	Number of case	1	2
1S 1B	16	3.4	
mS mB	23	3.9	3.9
mS 1B	11	4.0	4.0
1S mB	10		4.6
Sig.		0.130	0.129

Consolidated competitiveness				
Type	Number of case	1	2	3
1S 1B	16	3.7		
mS mB	23	4.1	4.1	
mS 1B	11		4.2	
1S mB	10			4.7
Sig.		0.074	0.989	1.000

Source: own analysis

3. NEW AND NEWISH RESULTS

1. Based on primary and secondary data ("production line" primary databases provided by GÉMOSZ and Datahouse), I assessed with system approach the role and situation of automotive industry and especially dealerships, with special regard to the effect of the global economic crisis of 2008.

2. During the research, I explored relations between the actors of automotive industry and assessed the position and relation of main actors on the market. Thereby, I established that the sector has a unique character, is featured by strong importer relation that influences the life, evolution and operation of dealerships.

3. On the basis of the life cycle model of Adizes, I explored and prepared, also taking into account Hungarian specificities, the life cycle model featuring the career path of Hungarian car dealerships.
   I found that the life cycle of these enterprises are featured by a unique evolution that does not mean the lack of stages but stems from the merging of them, that is it can be observed that more stages were ongoing at the same time.

4. Relating to the life cycle model, I found that the development stages of dealerships cannot be shown by a continued growth, later on decline curve, as Adizes stated during his own survey, as the life cycle of these enterprises can be rather compared to a roller coaster.

5. I found and justified statistically that those Hungarian dealerships are the most competitive that have one site but multi brand (regardless the advantages stem from the multi site). Moreover it can also be stated that majority of founders of multi brand and/or multi site dealerships are not financial investors.

6. Based on the results of the in-depth interviews and questionnaire it can be said that strategic thinking is not general in case of Hungarian dealerships. They do not apply conscious management tools, and only few of them think consciously and on the long term from the aspect of the dealership.

4. CONCLUSIONS AND SUGGESTIONS

By summarizing the results of my research, firstly I assess the justification and rejection of my hypotheses (Table 5) under the Conclusions and Suggestions chapter. Afterwards, structurally and focusing on the examined fields, I sum up my conclusions based on the analyses, finally I make suggestion to facilitate the maintenance of dealerships on the long term and to improve their competitiveness.

Table 5: Sum up of justification of the hypotheses

Hypotheses	Verification of the hypotheses
H1: Dealerships that neglected their services at the beginning of the years 2000 and made a living mainly by sales and commission came off badly after the crisis.	**accepted**
H2: Dealerships open further site in order to overcome the revolutionary problem of a given stage.	*rejected*
H3: Multi brand - multi site dealerships evolved from single brand single site dealerships, where amongst the owners of the dealerships financial investors also appeared beside the professional ones.	**the first part is accepted, the second part partly accepted**
H4: If more showrooms operate in one dealership, at one site, then those brands belong to the same group.	partly accepted
H5: Dealerships prepare annual plan based on (importer) order, do not make plans on the long term due to the continuously changing external environment, hence they do not prepare business or strategy plan either.	**accepted**
H6: Time of foundation affects the evolution and life stage of the Hungarian dealerships, as following to the change of regime enterprises started in a special environment without examples and experiences that led to specific characteristics in their development path.	*could not justify it*
H7: Amongst the dealerships, those enterprises are the most competitive that distribute more brands and operate at more sites, as these trading forms have the most professional (relating to management) and economic (lower costs per sites) advantages compared to the single site dealerships.	*rejected*
H8: One of the biggest problems of operating Hungarian dealerships while overcoming the crisis and currently as well is the inconvenient vocational education and the lack of manpower.	**accepted**

Source: own analysis

Conclusions on life cycle

After the change of regime, a unique situation has evolved in Hungary and dealerships were also established without formula to pursue and corporate management experiences. Later on, beside the special situation, several external factors, such as importer regulations, artificial increase of demand or the global economic crisis of 2008, also affected the development and growth of these enterprises. Stemming from this, life cycles of dealerships developed in a specific way, with unique characteristics.

All in all and regardless the brand, it can be said concerning the one brand, one site dealerships that empire building, involving additional brand and/or opening further site were not objectives

for the founders. They operate mostly as family businesses, with owners having professional experience.
Based on the in-depth interviews, the size of enterprises are appropriate for the long term, efficient and successful operation, consequently the life cycle of dealerships stuck at this point, advancing to the prime stage has not been happened yet. Meanwhile, the question occurs to what extent these dealerships will have the raison d'etre to maintain their activities in such quantity and form in this increasingly changing environment and amid continuous innovation of the sector.
As dealerships start to sale more brands or open more sites, the enterprise becomes increasingly complex and different organisational and management system. During the in-depth interviews with managers of multi brand, multi site enterprises, I experienced that although it has disadvantages, benefits are more determining and more stable and sustainable operation can be ensured on the long term.

Based on the in-depth interviews conducted and the relating literature, there are signs that owners should not stuck at the stage of one brand one site on the long term. It has been uncovered during my research that these enterprises are facing serious business challenge in the upcoming years and have to prepare themselves for a completely new business model in which they have to take into account for example the increasing importance of public transport.

In all case it needs to be further studied how life cycles and stages evolve in case of dealerships distributing different brands, and whether there is a difference compared to the dealerships that started later, 5-10 years ago. Unfortunately, during the in-depth interviews, I met only one such owner, therefore I cannot make conclusions regarding this.

Although I did not analyse in detail the question of succession, founders need to face this as well in the examined sector in the upcoming years, as they soon reach the age of retirement.

Conclusions regarding the strategy and competitiveness of dealerships

Production centre and importers influence not only the life and development of dealerships, but their strategy as well. Practically, all importers focuses only on their own interests. They affect the enlargement of showrooms, wages and education as well. Without importers, dealerships cannot even prepare annual plans, they need to have them accepted in any case, and their operation is under strict control.
Based on the results of the in-depth interviews and questionnaires, it can be said that strategic thinking is not general in case of the Hungarian dealerships, they do not apply conscious management tools and only few of them think consciously and on the long term from the aspect of the dealership.

During the analysis of competitiveness of dealerships, I established that although more sites have more benefits, still, enterprises operating at one site but distributing more brands are the most competitive.

Conclusions regarding the future of automotive industry and trade

As consequence of e-trade and change of consumer habits, it seems that trends in the future shift towards dealerships distributing more brands. The whole country is a potential clientèle now, buyers are willing to travel to other regions, if a certain model can be purchased or tried there, as well as if it is available for a better price.

At the same time, based on the results of the in-depth interviews and questionnaires as well as the literature, it shows a unique situation and vision in the sector that is contradictory for the time being.

Interests of dealerships and importers (or the manufacturer in case of Suzuki) crash, besides, vision for the future also becomes ambivalent against these interests by the transformation of the industry. In recent years it could have been observed that importers rather supported dealerships with one brand and one site than multi brands. Moreover, during the in-depth interviews it occurred that auto plazas that had opened earlier, mostly ceased to be exist in Hungary. In case of many brands it can be observed and readily accepted that they cannot be maintained by themselves and the owners need to include further brands into the range of products of the dealerships. This is also supported by the fact that the number of dealerships did not grow despite of the gradually growing market which shows that owners opted for new brands and used their already existing sites for development.

At the same time, higher ratio of one brand dealerships could be observed in case of more brands until 2008 (apart from Suzuki), such as Nissan, Seat or Honda showrooms. In case of those who did not survive the global economic crisis and went bankrupt from these dealerships, the reason can be that the purchasing power dramatically decreased, the mentioned showrooms became empty and such enterprises could not survive relatively close to each other, within one city.

All in all it can be stated based on my conclusions that for the time being one site multi brand dealerships have the most opportunities in the future. The results of my research show that benefits of multi site dealerships do not suffice that such expanding and development be worth for the owners.

Although in my opinion multi site multi brand enterprises are still in a more advantageous position on the long term than one brand one site dealerships.

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