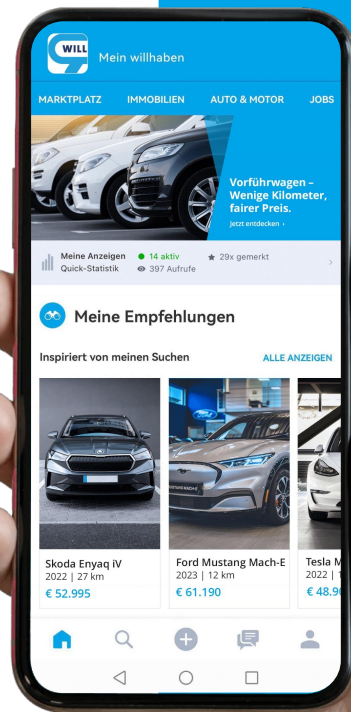


WILLHABEN

From fragmentation to focus

The transformation of
willhaben's motornetwork

May 2025



Hi, I'm Alexander Reissigl

Let's talk marketplaces, data & digital scale



/whoami

- > role: Head of Cars & Motor (Vertical)
- > background: Corporate & Business Dev.
- > focus: Mobility | Ecosystem Strategy | Platform Transformation
- > fun fact: Petrol head without a car since 2020

Let's connect



before we deep-dive: willhaben at a glance ;-)

willhaben is 100% Austrian at heart
backed by international scale...



STYRIA
MEDIA GROUP

One of the leading media
groups in Austria, Croatia,
and Slovenia



Austrias #1
digital Marketplace

Adevinta



Sprints

willhabinger:inner Facts



380+
willhabingers



27
nationalities



44%
female share



15
Office dogs



WILLHABEN

We are obsessed with users, customers and product

WILLHABEN

News Log in | Register

+ Place a new ad

MARKETPLACE 12,831,889

PROPERTY 104,986

CAR & MOTOR 206,101

JOBS 16,727

Austria's largest classifieds portal | 13,159,703 ads

**WER CASH
MACHEN WILL,
WILLHABEN.**

**VERSAND
ab €1,99***

**Verkaufe deine
Fashion-Pieces &
mache sie zu Geld!**

Mehr erfahren >

*auf Fashion & Kinder Artikel, gültig bis auf Widerruf

WERBUNG



Marketplace

Find everything - on Austria's
largest digital marketplace



property

Discover your new home on
willhaben



Car & Motor

Your cars and motorcycles in
Austria



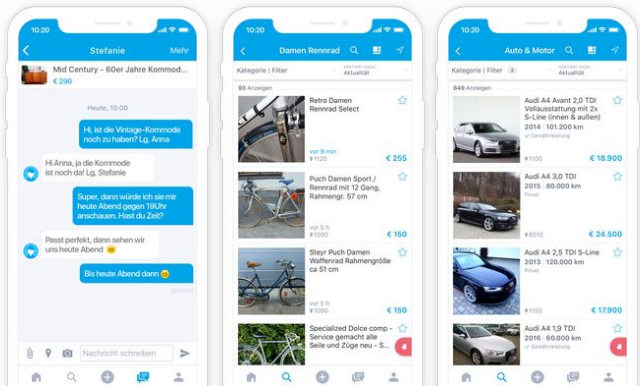
Jobs

Are you looking for a new job? We
have one!

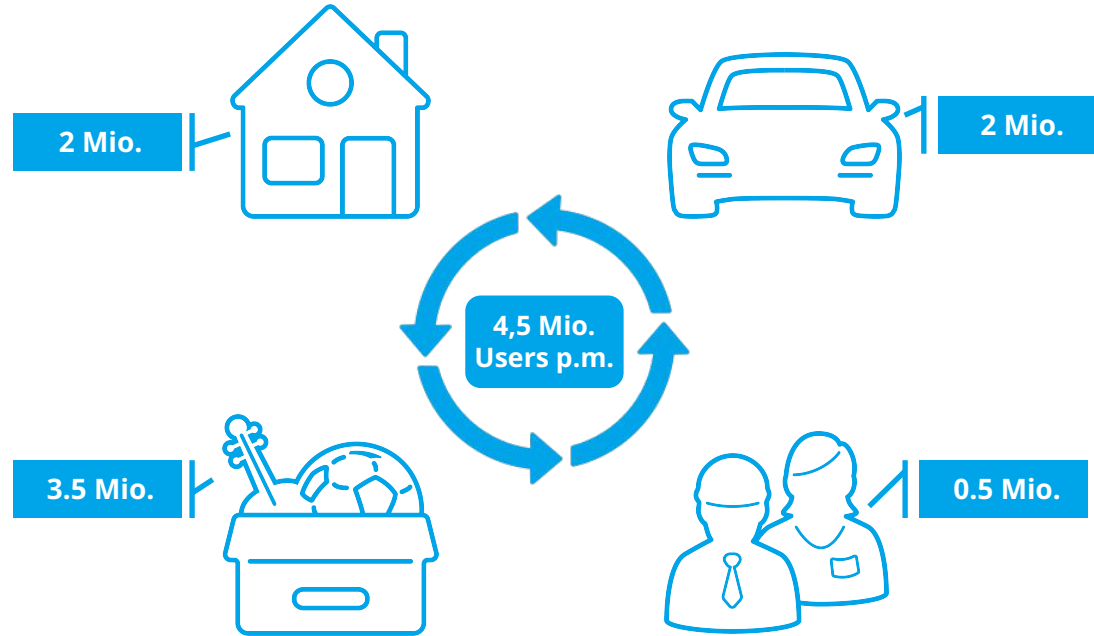
€ 3,9 Bn.
GMV

€ 17 Bn.
GMV

€ 77,4 bn.
GMV



We catalyse powerful network effects across all verticals



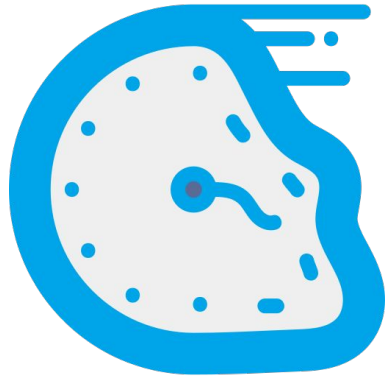
Mission

We connect people on Austria's most trusted marketplace — generating perfect matches and real value for privates and pros alike.



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Let's rewind to where it all began — the early days of car classifieds in Austria



15 Years ago – fragmented classifieds & tool landscape

Car Classifieds Portals

- / willhaben cars & motor
- / gebrauchtwagen.at
- / car4you.at
- / autoscout24.at
- / derstandard.at/AutoMobil
- / motorbazar.at
- / fundgrube.at
- / finden.at/auto



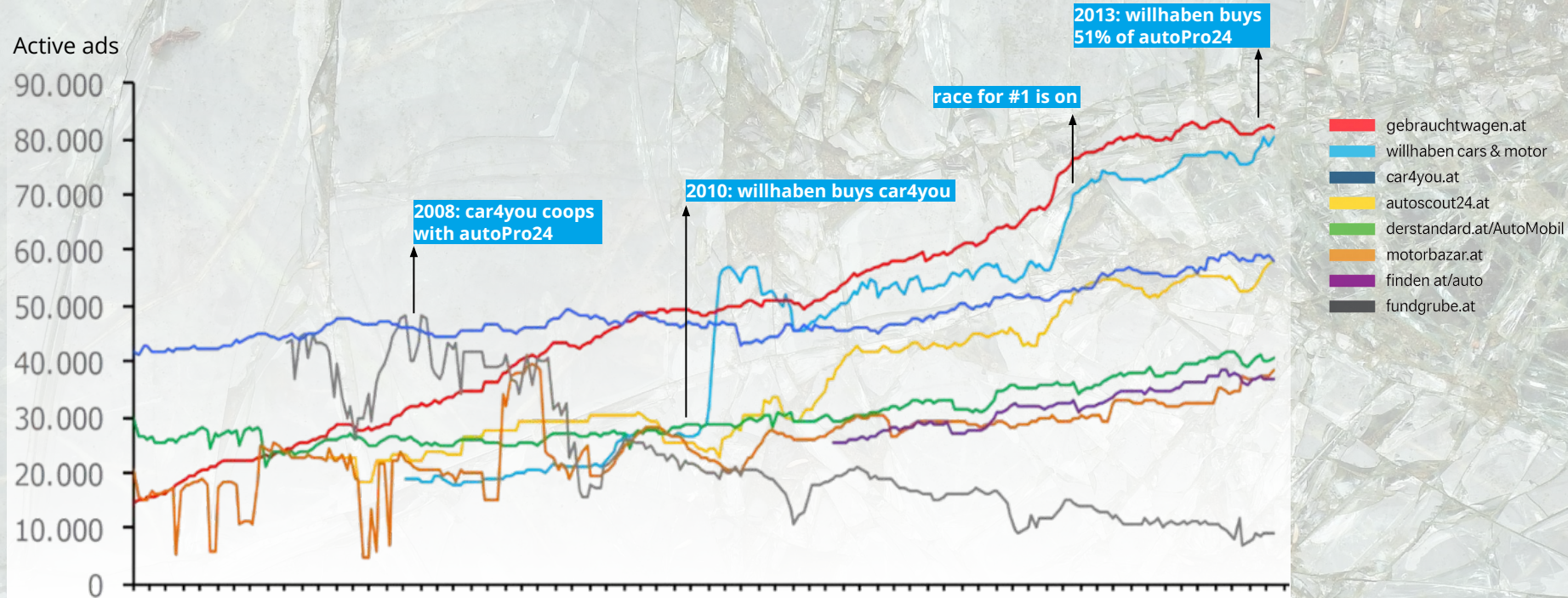
Limitations for Dealers

- / Multi-Platform chaos: fragmented Demand & Supply
- / No centralised inventory management
- / No platform-sync
- / Redundant work
- / No real insights on listing performance
- / Pricing decisions on gut-feeling or Eurotax
- / Mostly non-digitized, intransparent workflows



The market was fragmented — and dealers were left to navigate the digital jungle alone...

Consolidation in AT car classifieds until 2013 – Phase 1



willhaben Motornetwork was brought into being



WILLHABEN

Capabilities brought in

- / Wide classifieds reach across var. categories
- / Strong brand recognition in Austria
- / Simple & fast user experience for privates
- / Rapid traffic growth, incl. mobile users
- / Scalable tech platform
- / Broad, non-specialist audience appeal

willhaben Motornetwork was brought into being



Capabilities brought in

- / Structured vehicle data for better search and display
- / Established dealer network with strong B2C focus
- / Professional tools for inventory and listings
- / Integration of data enrichment capabilities
- / Trusted brand among auto professionals

willhaben Motornetwork was brought into being



Capabilities brought in

- / Tailored tools for professional dealers
- / Started as a custom-built DMS by one man for a Viennese car dealer
- / Integrations with dealer management systems
- / Multi-platform listing syndication

willhaben Motornetwork was brought into being



One of the top vertical specialists in car classifieds in AT

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Strong reach and network effects as top horizontal

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MOTORNETZWERK



Powering daily operations for small and mid-sized car dealers — evolving into a data hub

The mission: Creating a comprehensive offering for dealers

Under the bonnet: the „patchworky“ start of our motornetwork

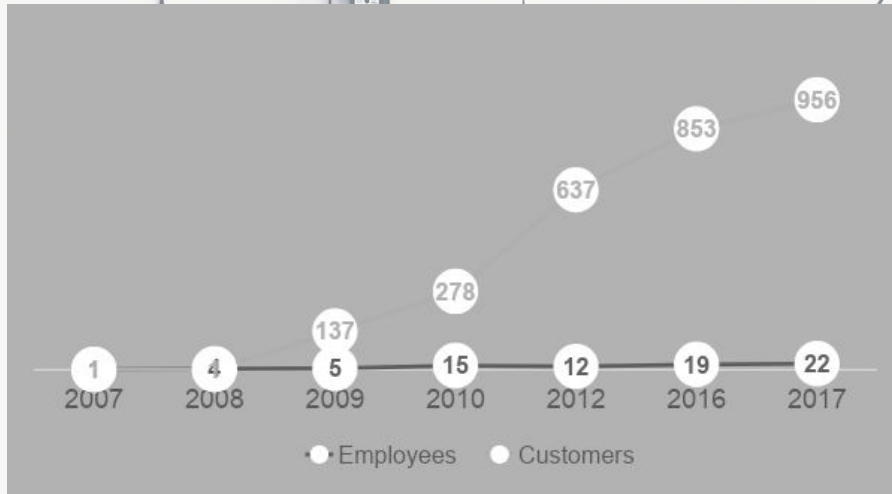


2012/2013: Wiring the engine by hand

- / car4you, autoPro24 and willhaben wired together
- / Features added driven by individual dealer needs
- / No clear product vision or roadmap guided development
- / Features were tightly coupled, making systems fragile and hard to scale
- / Maintenance relied heavily on insider knowledge and ad-hoc problem-solving

Still: it did the job pretty well for the time being...

Under the bonnet: the „patchworky“ start of our motornetwork



2014-2017: More feature, more duct tape

- / Rapid feature growth...
- / CRM
- / Payment & invoicing handling
- / Data enrichment
- / Custom Printables
- / Advanced Dealer Websites
- / Codebase complexity increased, maintenance effort soaring

Despite growing complexity, the system kept delivering

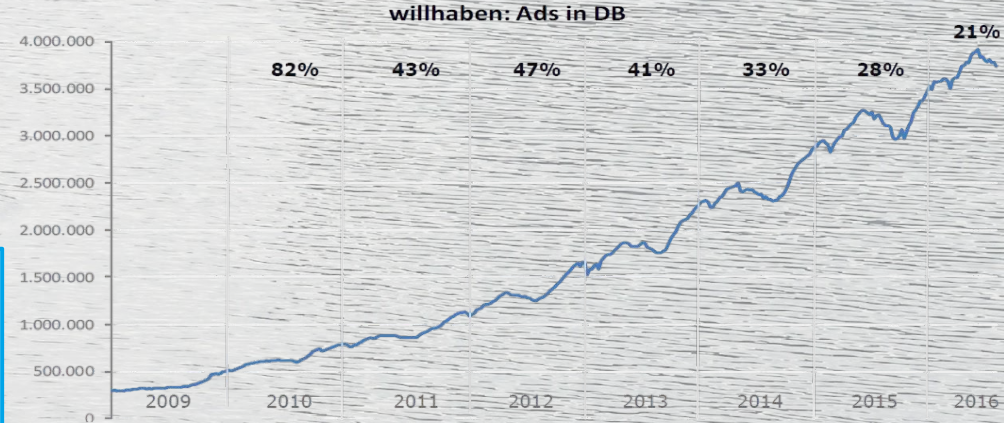
Meanwhile, willhaben fully focussed on supply & demand...

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Same boat, different prios & perspectives

- / Competing across four verticals – aiming for #1 in each
- / Strong contender in Gen.Merch.: SHPOCK – acquired by Schibsted to safeguard our position (2013-18)
- / Relentless focus on solving user problems to build the best product

willhaben allocates focus where it matters most – and cars & motor are clearly delivering

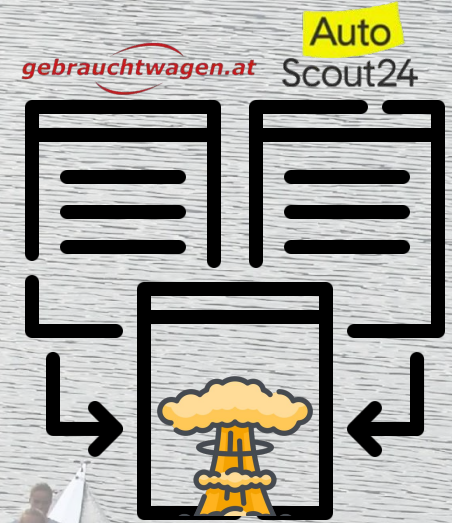


Consolidation in AT car classifieds in 2017 – Phase 2

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Tectonic shift in the car classifieds landscape

- / Early 2017 willhaben starts work on own dealer self-service frontend to replace car4you eventually
- / In mid-2017 autoscout24 acquires #1 gebrauchtwagen.at
- / Sets the new formation to clear #1 position
- / **Key Sales Reps changed from gebrauchtwagen.at to Willhaben**



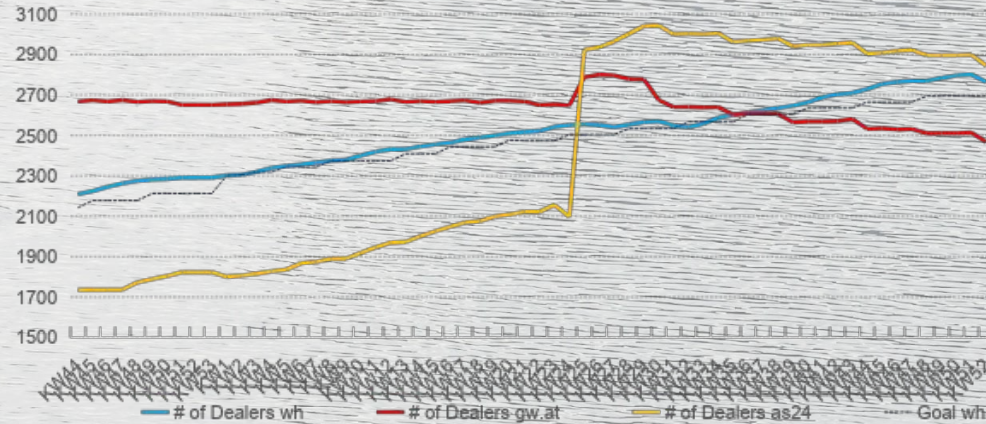
2017/18 – two dealer frontends and a fierce competition for #1

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Maximum push with geared-up sales force

- / focus 2017 / 2018 on acquiring all existing dealers in the market □ USP: Reach, two dealer frontends and XML Import & exports to key players
- / Intro agile regional sales units (reps, support & KAM)
- / willhaben Sales Team Manager streamlines aP24 sales
- / Goal 2700 Dealers by end of 2018 – surpassed 🏋️💥

Hard sales work + high service levels made all the difference... willhaben is finally reaching for the top!



Under the bonnet: craftsmanship meets corporate strategy



the willhaben-chapter begins

- / willhaben (via car4you) acquires remaining 49% of autoPro24 → becomes 100% owner
- / Shift from solving dealer issues to becoming part of a large classifieds ecosystem
- / autoPro24 had become the backbone of Austria's vehicle listing data – the teenager had to grow up
- / New expectations, priorities, and stakeholder alignment followed thereafter
- / Integration into the corporate structure began and the hand-built engine had to scale
- / The technical foundation remained the same. Pushed to the limit.

autoPro24 entered a new era—no longer a clever workaround, but real critical infrastructure...

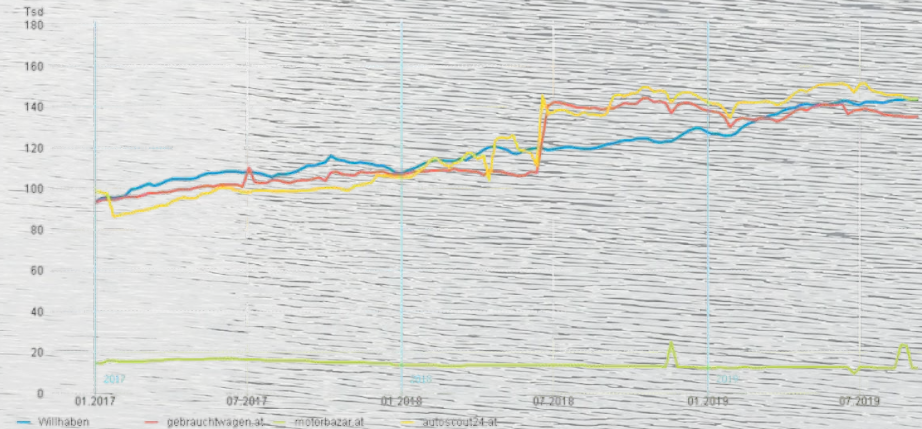
2019: Dealer tools simplified, private journeys improved - we took lead again

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willhaben & autoPro24 – different battles

- / willhaben improved private journeys and iterated on a leaner DSF
- / First fully E2E team made all the difference and nailed the initiatives helping to win on the supply front
- / autoPro24 navigated internal change and stability

Clarity and focus led willhaben back to #1.



2020/21: we need to capture our monetization headroom

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Understanding core growth potential

- / Fierce battle for #1 □ 10YR price adjustment stalemate
- / We ran an extensive monetization boost program
- / Built up internal skills and teams and gained confidence
- / Packed autoPro24 into our bundles and launched them in 2021 with a whopping +24% avg. PI

Monetization Headroom filled, now how to keep the trajectory?

	NORMAL	SUPER	SUPER PLUS
HÄNDLERDARSTELLUNG			
Händlerprofil Pro	✓	✓	ohne Fremdwerbung
Personalisierte Händlerprofil-URL	✓	✓	✓
Link zu Ihrer Website	✓	✓	✓
Link zu Ihrem Gesamtbestand	✓	✓	✓
Individuelle Link-Integration pro Anzeige	—	✓	✓
Motornetzwerk Freie Fahrt***	—	—	✓
FAHRZEUGDARSTELLUNG			
Ihr Logo in der Trefferliste	—	✓	✓
Anzeige von 360°-Bildern	—	—	✓
Mehr von diesem Händler in der Detailsicht	Fremdinserte	Ihre Inserate	Ihre Inserate
Anzeige einer Kredit-/Leasingrate	—	✓	✓
Streichpreis mit Aktions-Badge	—	—	✓
PROFESSIONELLE WERKZEUGE			
autoPro24 Basis-Paket****	✓	✓	✓
Marktmonitor	✓	✓	✓
Statistik Pro	✓	✓	✓
Rabatt auf willhaben MNU-Produkte*****	—	5%	10%
Fahrzeugliste für Ihre Website	Standard-Design	In Wunschfarbe	In Wunschfarbe
PRIORITÄT & SICHTBARKEIT			
Vorhebung Ihrer Anzeigen	—	wöchentlich	✓
inkl. monatl. smarter Sichtbarkeits-Produkte	—	✓	✓

Under the bonnet: VMS6 and the hard lessons of reinvention



Long awaited evolution leap

- / Goal: VMS6 was meant to be a fresh, scalable DMS built on AWS
- / Vision: modern tech stack, faster delivery, easier maintenance
- / Reality: team underestimated complexity of full rebuild
- / Chose to start from scratch — without proven frameworks
- / Lacked experience in cloud infrastructure and microservices
- / Architecture didn't hold — bugs, slowdowns, high effort for small changes
- / Tension between agility & structure, between market speed & architectural hygiene

The tech debt returned in new form...

VMS6 stumbled, we took a new path: tech & culture reboot

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autoPro24

Pivot of product strategy & org

- / Goal: build upon old systems, refactor, decouple and win time-to-market
- / Vision: lean and performant dealer tool, reduced to the core features □ shrink to grow!
- / autoPro24 teams integrated into willhaben and adopted core principles like OKRs, cross-functional teams and culture
- / We moved from “do-it-all” generalists to clear roles and shared ownerships aligned through mutualized guidance

Recap: autoPro24 isn't just software. It's a platform with history — built from the ground up by listening obsessively to dealers, stumbling, and rebuilding again!



GMS/V4 can be improved to be the engine for our customers' success

VMS6 stumbled, we took a new path: tech & culture reboot...

WILLHABEN

autoPro24

Best of both worlds

- / Initial skepticism in the team was natural, but overall openness was high
- / Change takes time — and patience was just as important as process
- / A common strategy was established and aligned
- / We started full on refactoring on a fresh infrastructure
- / We said goodbye to deprioritized features to gain speed

Tough decision had to be made, and new ways of work had to be established – and it worked!

...we merged minds and got to work

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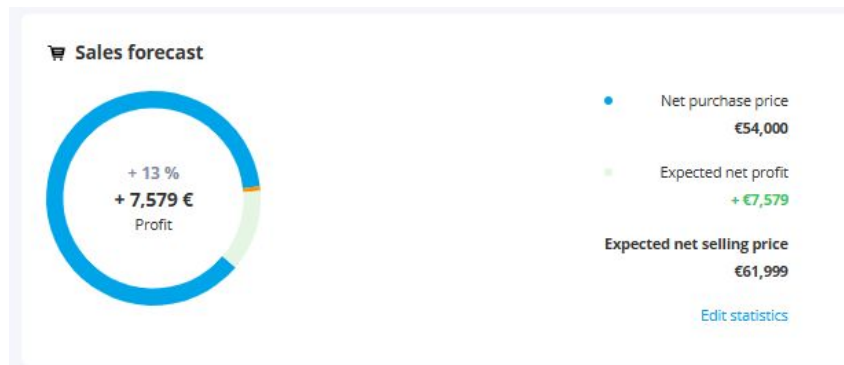
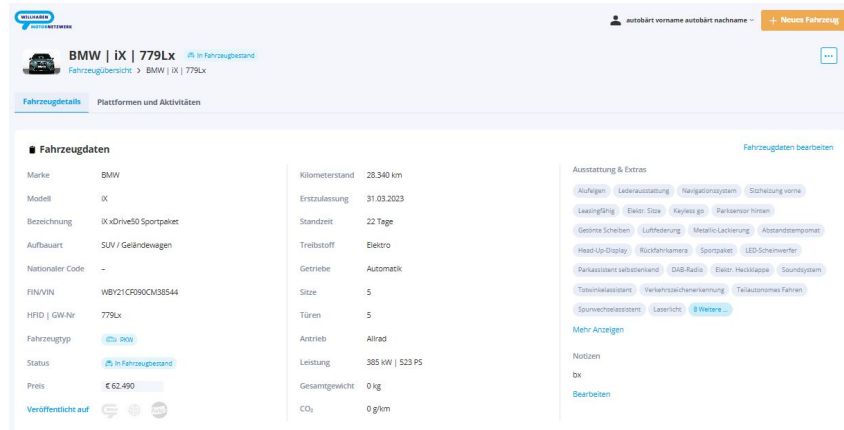
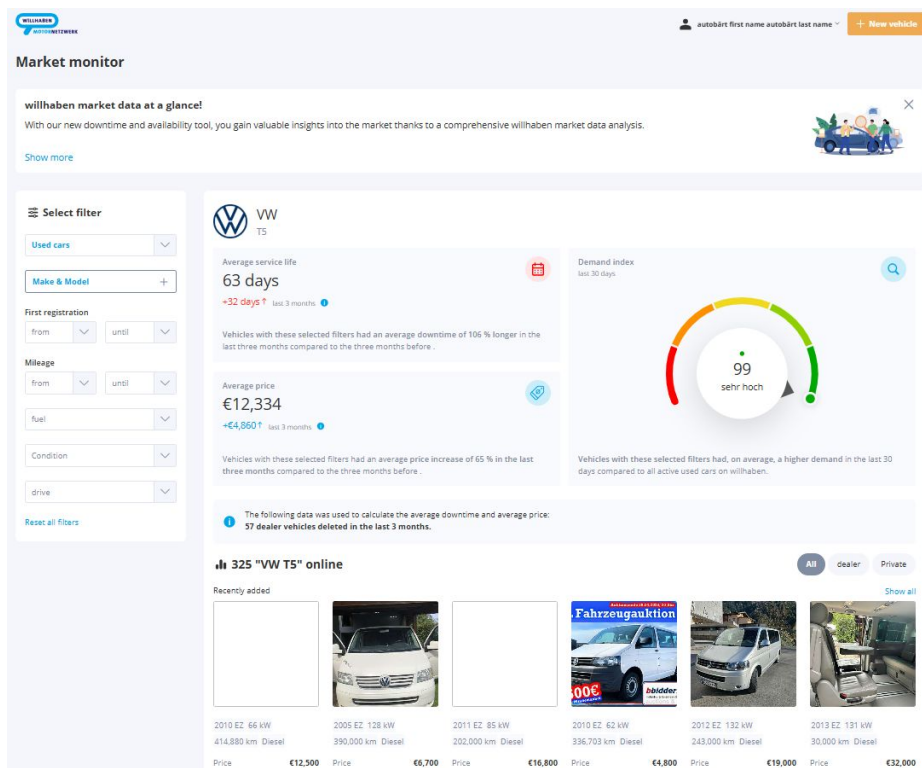
autoPro24

CARMA comes to life

- / autoPro24: Deep expertise on taxonomy, import & export
- / Willhaben: Great, fresh UX and fast workflows
- / willhaben: Platform data power delivering key insights and statistics
- / Together: clear roadmap enabling efficient car trading
- / Together: Fast incorporation of customer feedback

We made it – a big chunk of our dealers is migrated to the new system and start loving it <3

It's live, and it's a game changer!



Huge performance successes since 2021...



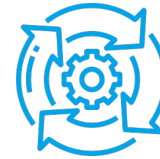
Commercial

- / **ARPU +60%**
- / Rev. +98%





Customers

- / **#Dealers +24%**
- / Low churn



Performance

- / **Car buyers in AT using  89%**
- / **65%** of those find their car on 
- / Continuous all-time-highs in traffic and leads



Thank you!