

Sustainable Mobility

Insights on Customer requirements and Purchase intentions in Germany / UK / NL

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Germans are highly mobile for various occasions



2

Average number of Trips with usage
of a mean of transportation
from 5 km+ for persons over 14 years

around 500 trips
per person per year



Average number of trips
per event per person per year

Work/school	170
Food-shopping	72
Errands	37
Sports Exercises	35
Authorities/Bank	25
Shopping	24
Doctor/hairdresser	22
Visits of friends	19
...	
Holiday trips	2

Basis:
Representative survey of n= 36,000 persons
14 years and older in 20,000 households

Car is the main mean of transportation in Germany

Share of the means of transportation

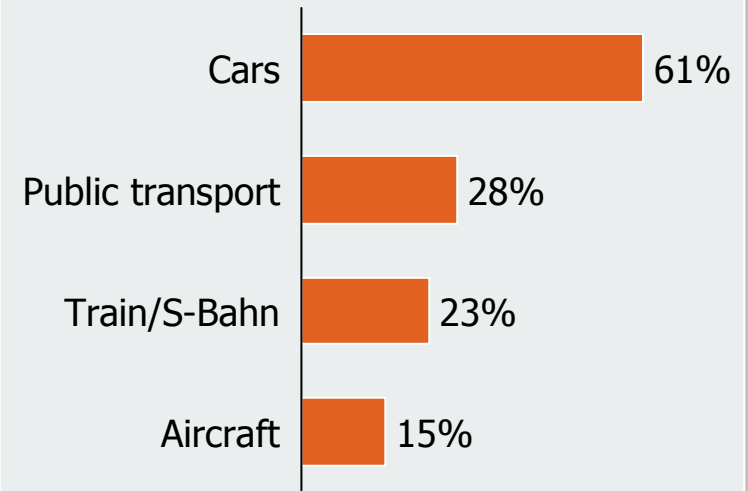


Number of Transports supported rides from 5 km+

30 billions trips per year



Share of persons with usage of the respecting mean of transportation



Basis:
Representative survey of n= 36,000 persons
14 years and older in 20,000 households



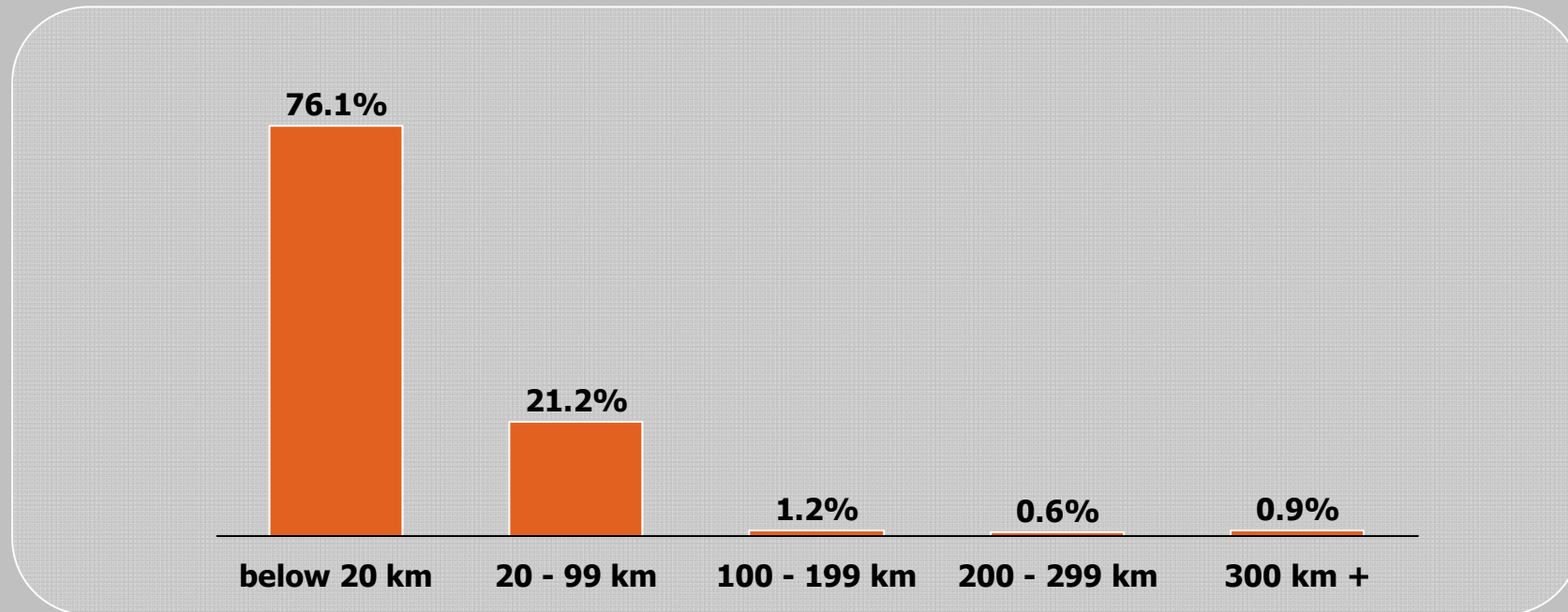
Mobility behavior in Germany:

3 out of 4 trips are in a distance less than 20 km

Car trips by distance class



4



Basis:
Representative survey of n= 36,000 persons
14 years and older in 20,000 households

Introduction of various types and models of electrical vehicles in the next 2 years

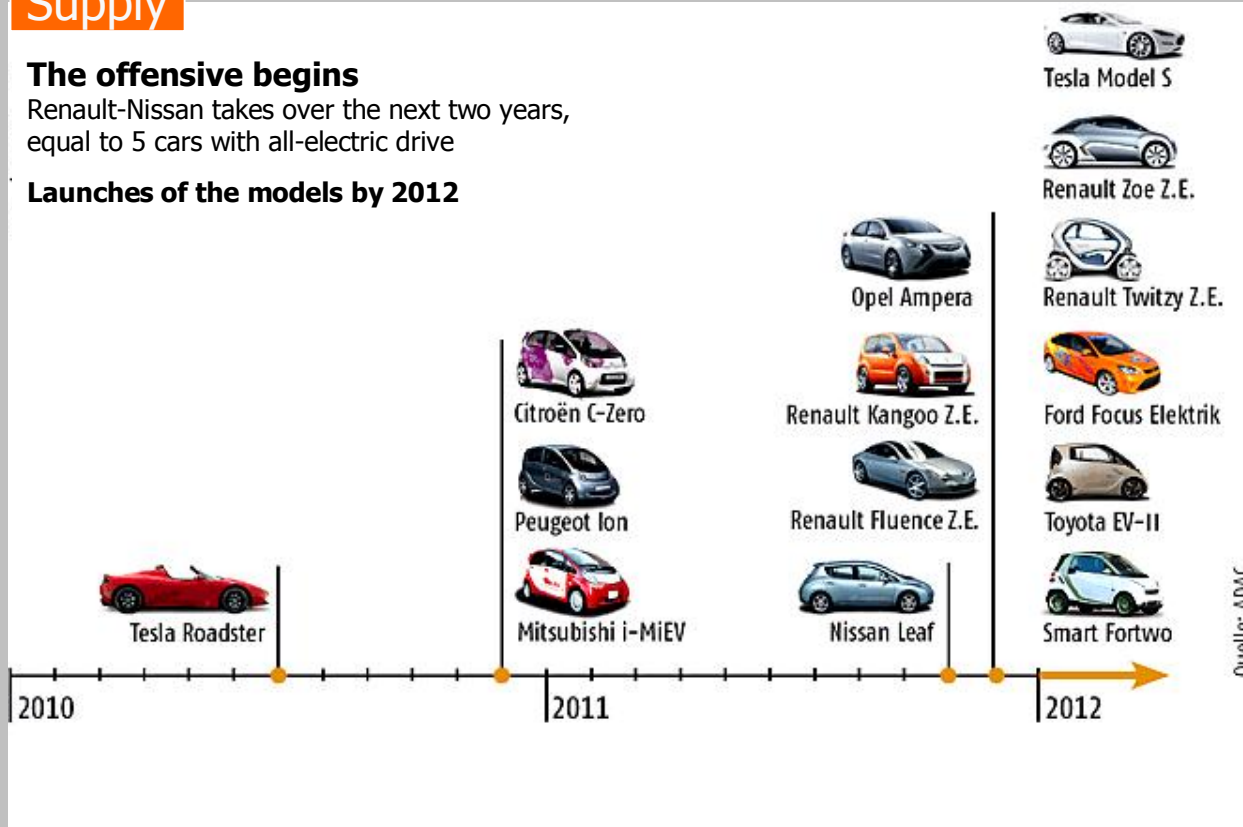


Supply

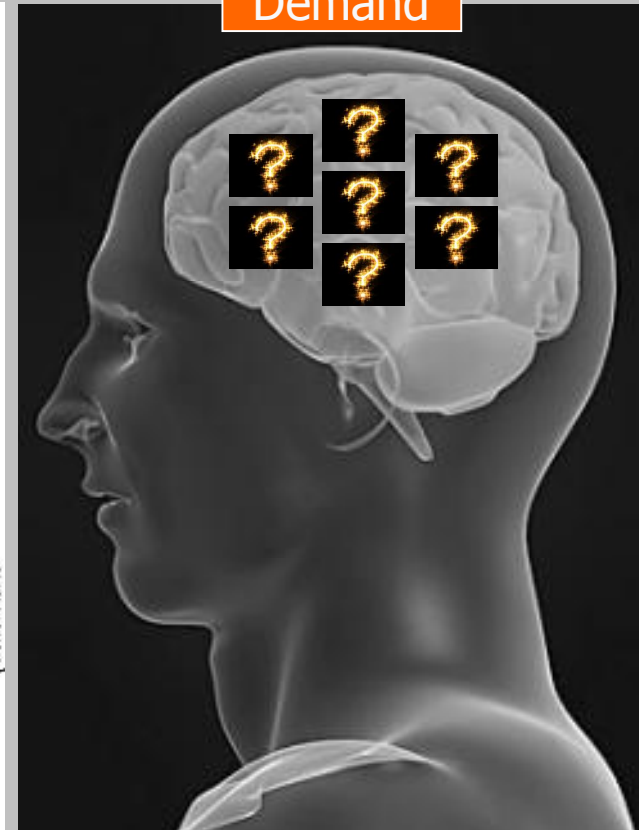
The offensive begins

Renault-Nissan takes over the next two years, equal to 5 cars with all-electric drive

Launches of the models by 2012

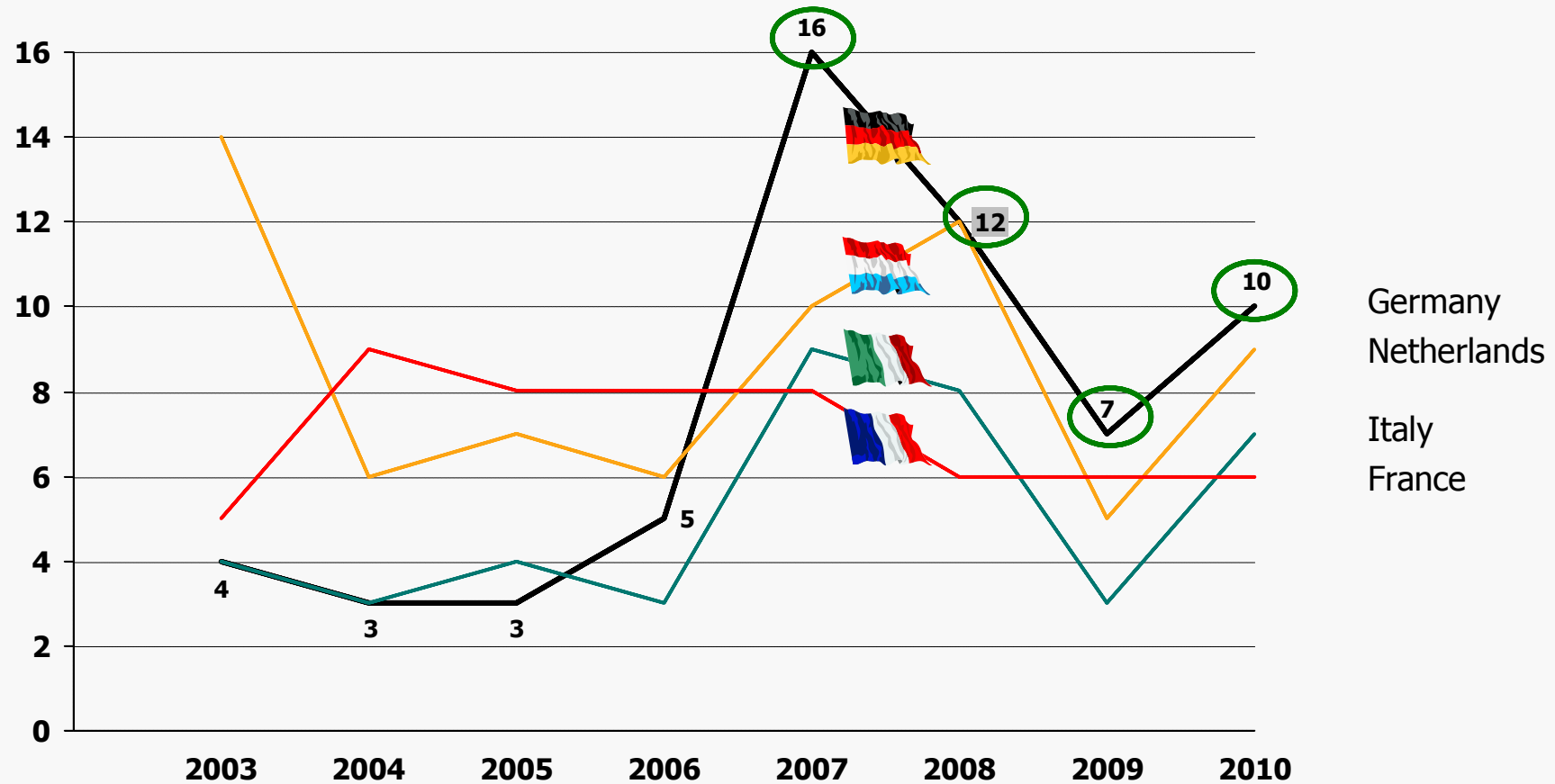


Demand



The main concerns of the Europeans in 2010: Highest Share of population with Ecological orientation in Germany

6



Project design

Aim of project

Delivery of empirical data about expectations, requirements and purchase intentions of electric vehicles in Germany, UK and NL

Target group

Persons 18 years + with Internet-Access

Methodology

Online-Questionnaire

Sample sizes

Germany 	UK 	NL 
n= 6,199 persons	n= 4,116 persons	n= 10,804 persons

Fieldwork

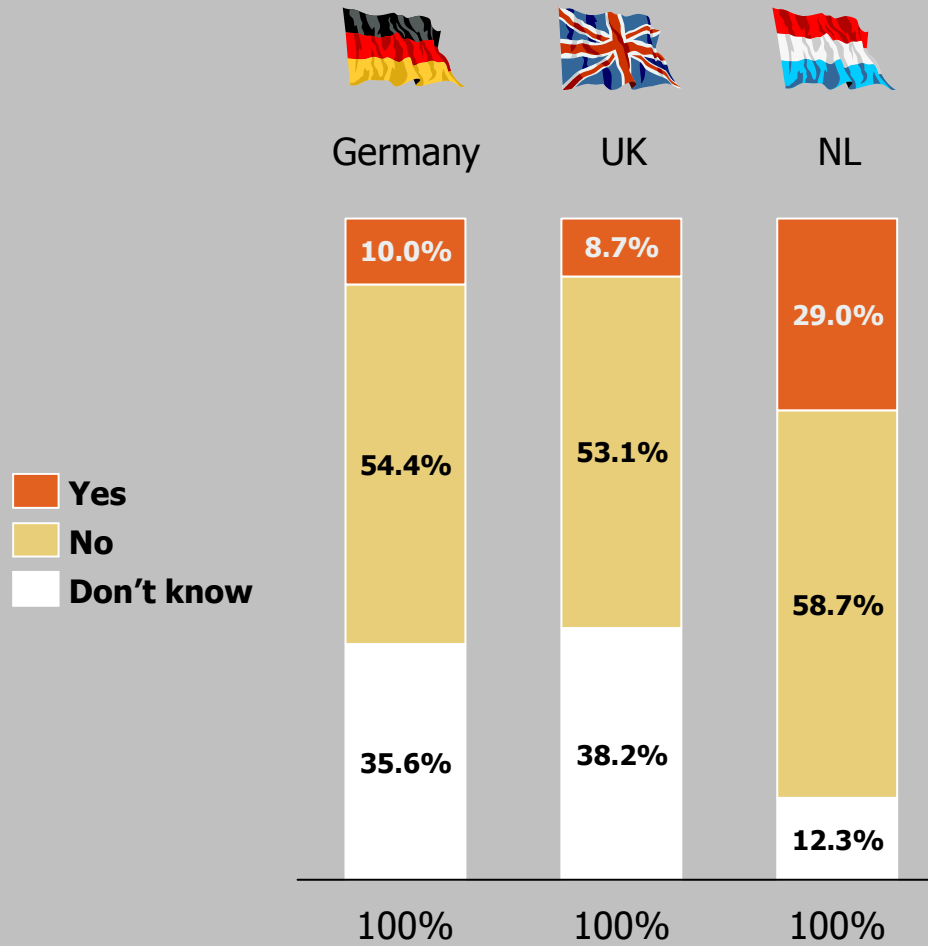
Aug. 2010

Oct. 2010

Nov. 2010

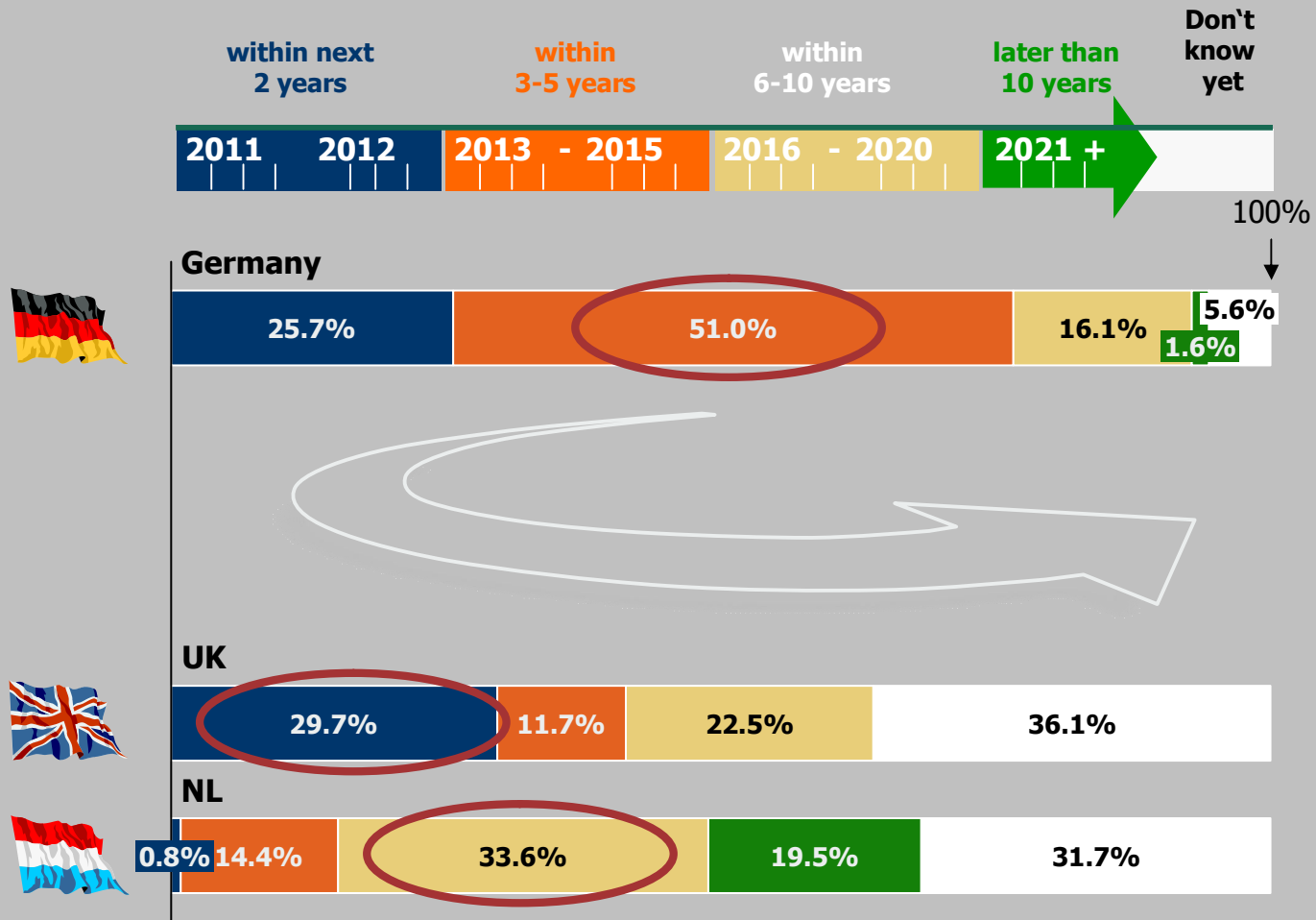
Purchase intention of an electrical vehicle

8



Basis: Adhoc-Online survey in 2010

Planned time period for purchase of an electrical vehicle mainly from 2013 on*



* only persons with purchase intention
 Germany : n= 590; UK: n=358; NL: n=3133

Basis: Adhoc-Online survey in 2010



High market potential in Germany



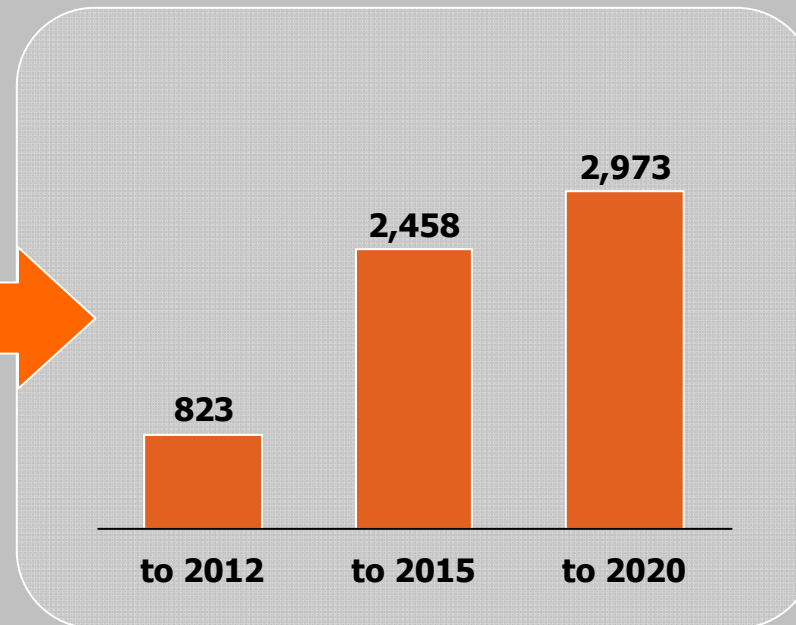
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Purchase intention

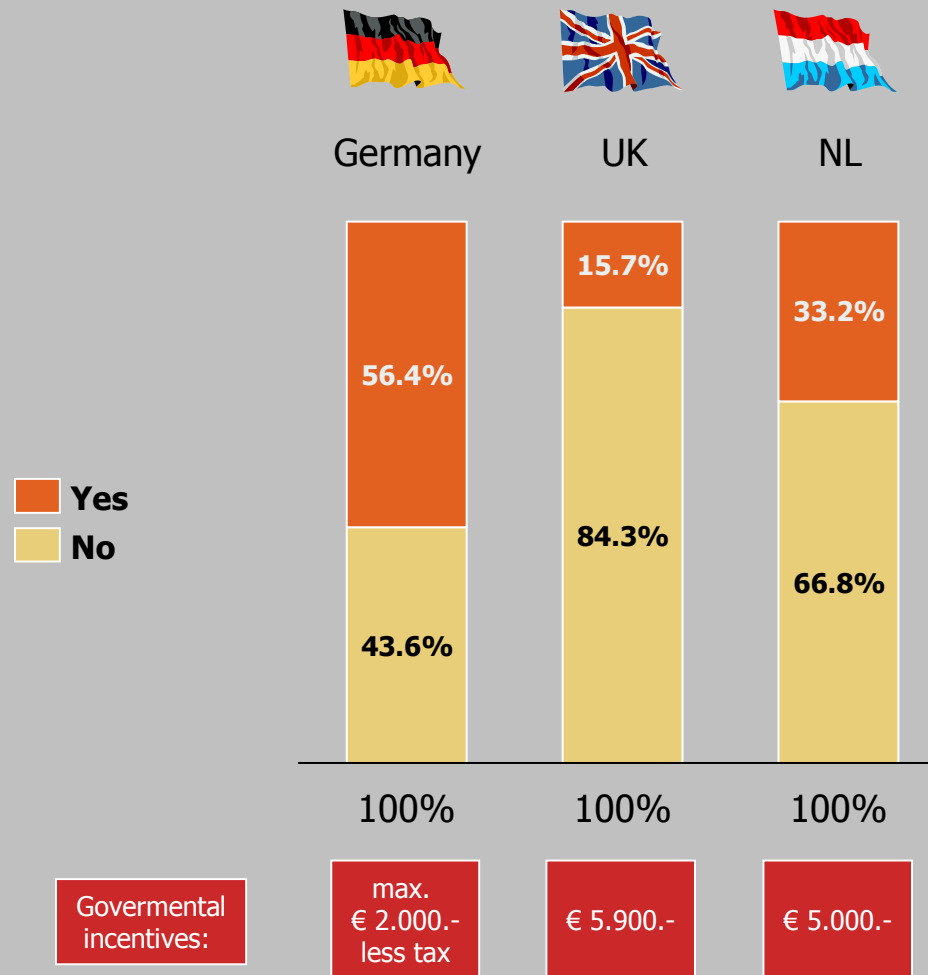
Already currently every 10th German above the age of 18 years with Internet-access, considers to purchase an electric car seriously.

Sales potential (in 1,000 vehicles)

(Basis: People with purchase intention)



Purchase intention: Willingness to pay a higher price*



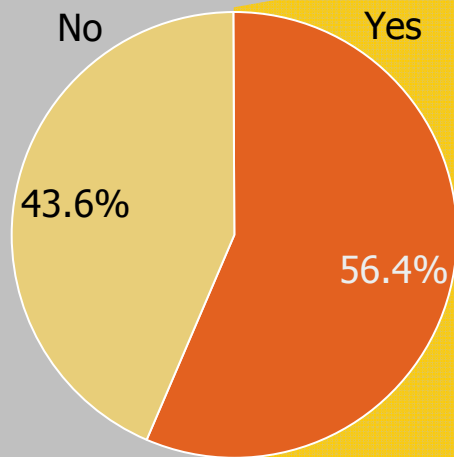
* only persons with purchase intention

Basis: Adhoc-Online survey in 2010

Purchase intention: Willingness to pay a higher price in Germany and accepted amount of extra charge

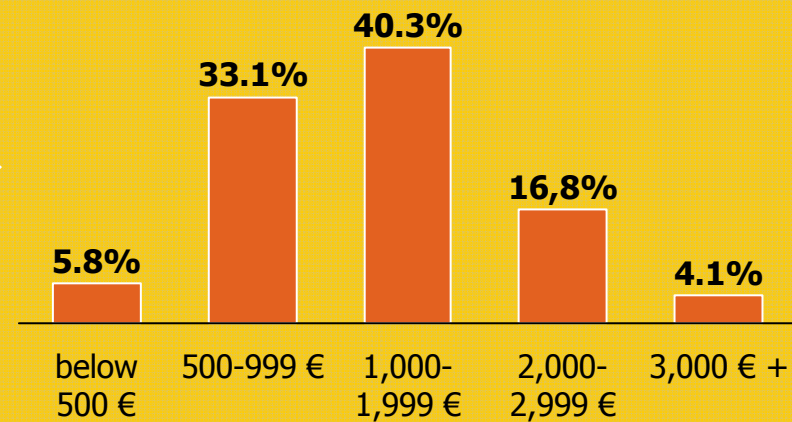


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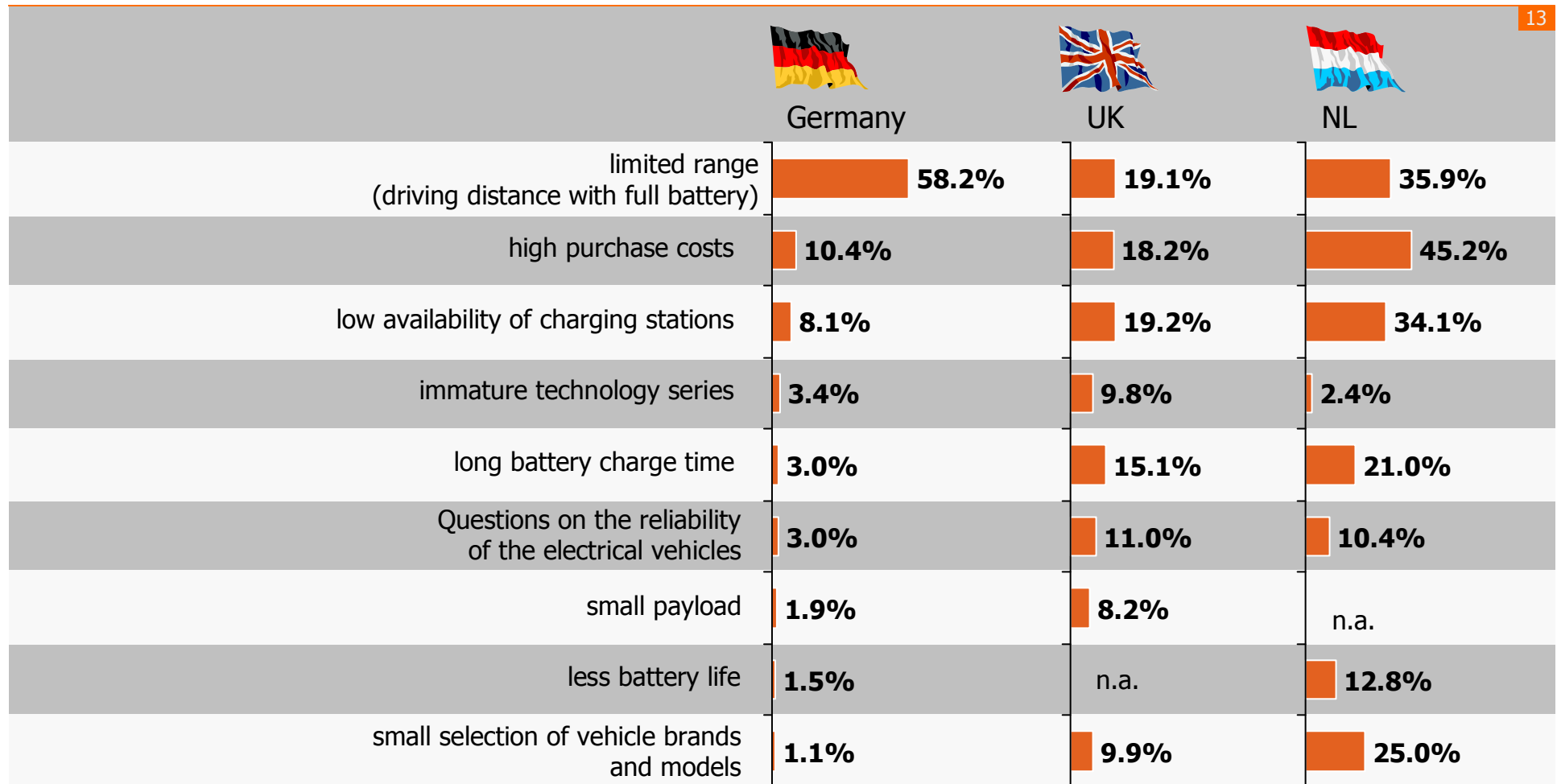
→
=100%

Percentage of people with acceptance of an extra charge of:



Basis: Adhoc-Online survey in August 2010 (n= 6,199 persons) aged 18 years + with Internet-Access

Main reasons for not planning to purchase an electrical vehicle are limited distance and high price

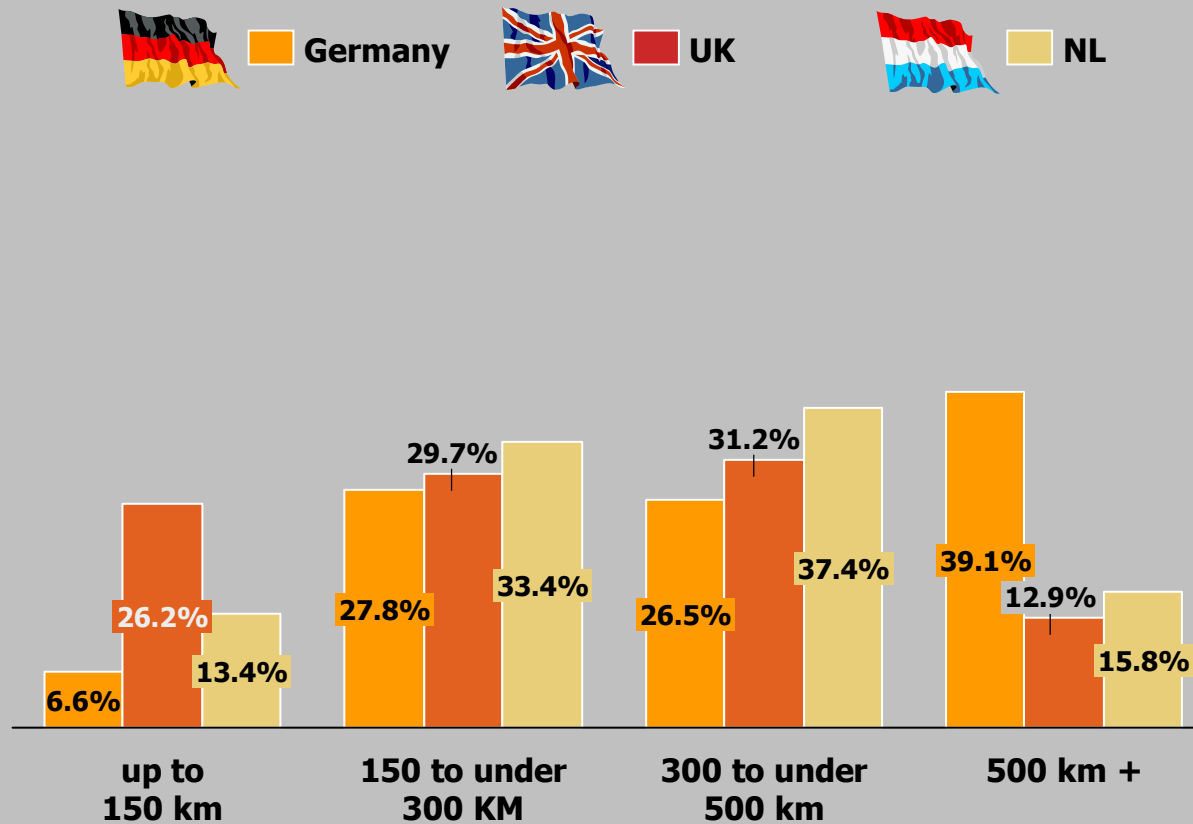


* only persons with purchase intention

Basis: Adhoc-Online survey in 2010

Higher requirements of german consumers towards travel distance range of electrical vehicles*

14



* only persons with purchase intention
Germany : n= 590; UK: n=358; NL: n=3133

Basis: Adhoc-Online survey in 2010

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Conclusion

15

Consumer Potential

Basically there is a high willingness for sustainable mobility amongst the consumers: already 9% (UK) to 29% (NL) of consumers think about an electrical vehicle for the next car purchase.

Target group

The purchase intention increases with available purchase power and educational level in all countries. More than half of purchase intenders in Germany accept a higher price up to € 2.000.- for an electrical vehicle.

Barriers

Limited range of battery, small penetration of charging stations and high purchase prices are the main barriers for consumers in all countries.

Planned User behavior

Mainly usage planned as second car in household for downtown traffic within a distance up to 50 km a day.

Customer requirements

A small car with a range up to 500 km and a max. speed of 150 km/h is accepted by the majority. Battery charging from home is a must have.

Thank you for your attention!



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