

# Sustainable Mobility

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

Herbert Lechner  
GfK SE, Panel Services Germany  
Division Manager GfK Mobility  
Tel.: +49 911 / 395 - 3668  
Fax.: +49 911 / 395 - 4433  
E-Mail: [herbert.lechner@gfk.com](mailto:herbert.lechner@gfk.com)

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# Mobility behaviour in Germany: Germans are highly mobile for various occasions



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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



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

# Mobility behaviour in Germany: Car is the main mean of transportation in Germany



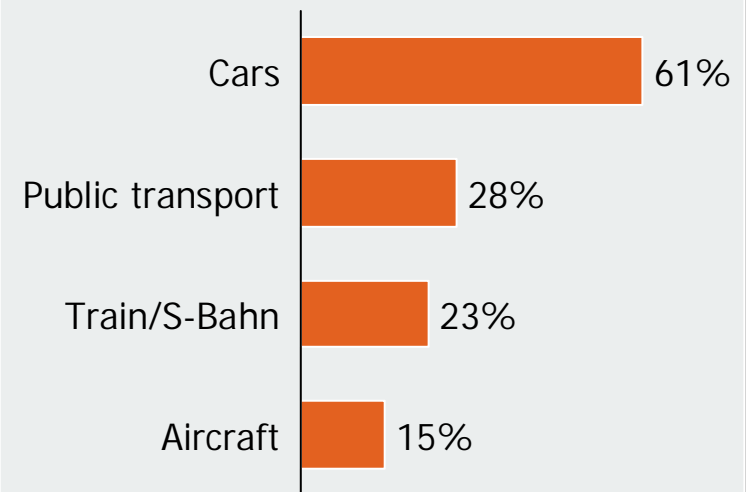
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Number of Transports supported rides  
from 5 km+

30 billions  
trips per year



Share of persons with  
usage of the respecting  
mean of transportation



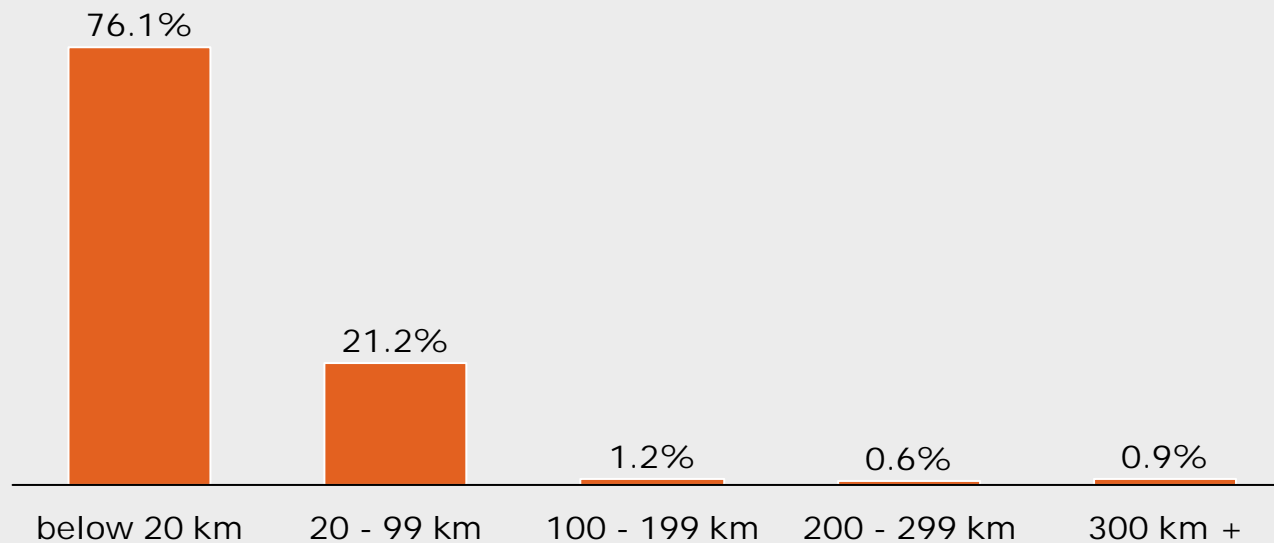
Basis:  
Representative survey of n= 36,000 persons  
14 years and older in 20,000 households

# Mobility behavior in Germany: 3 out of 4 trips are in a distance less than 20 km



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## Car trips by distance class



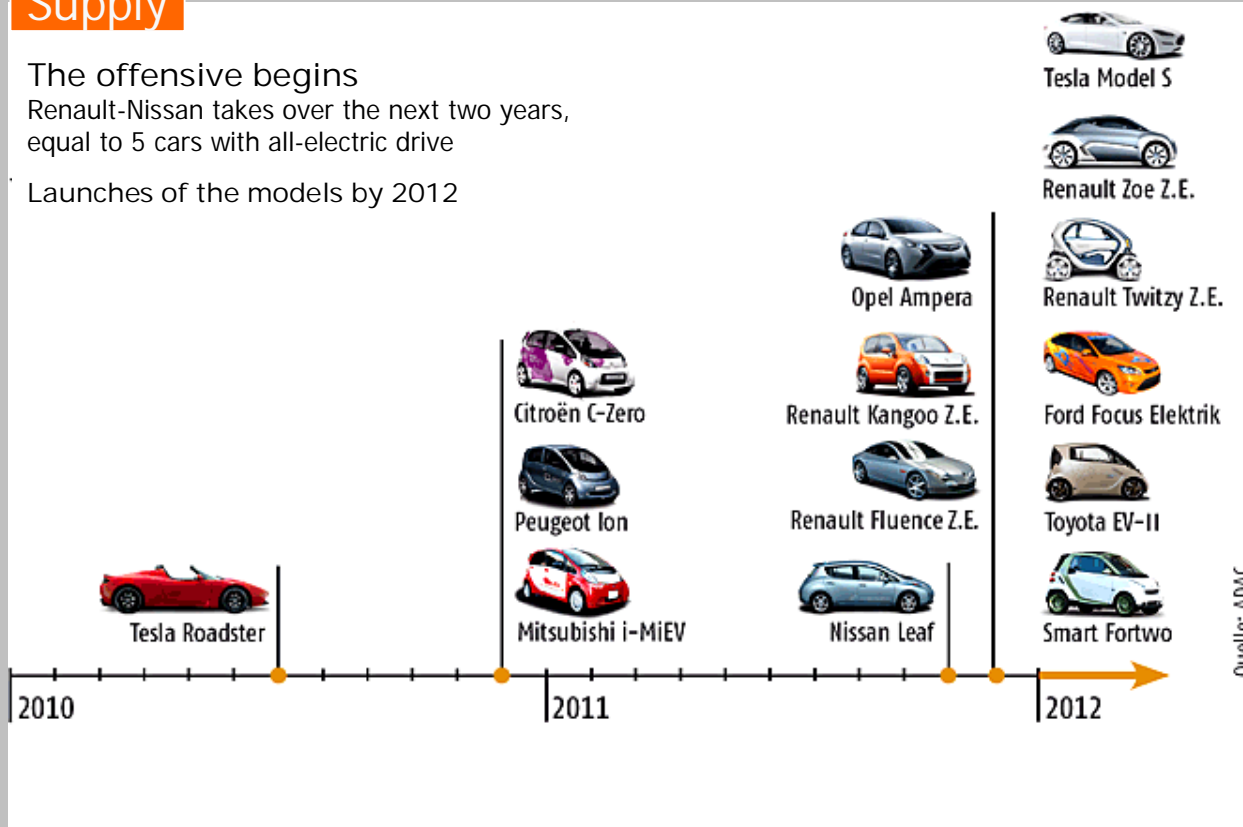
Basis:  
Representative survey of n= 36,000 persons  
14 years and older in 20,000 households

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

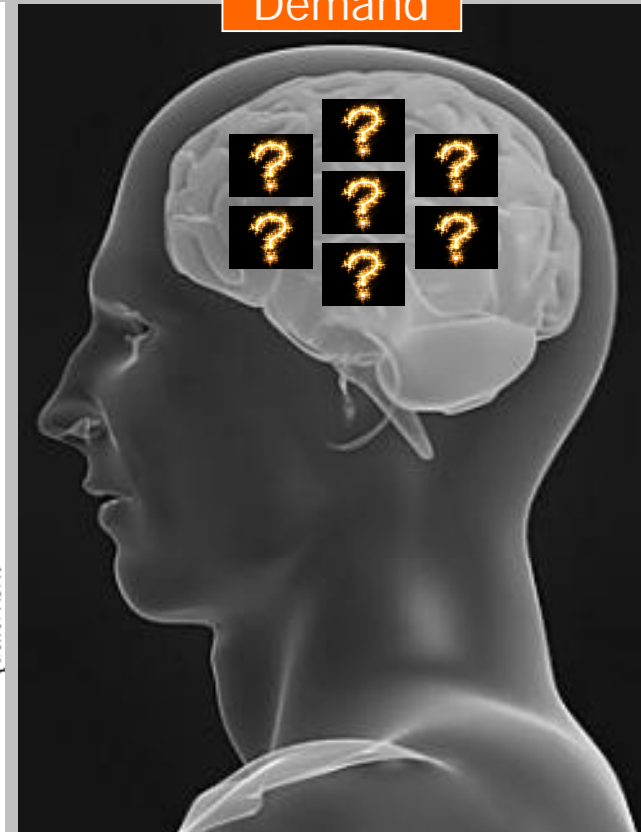


## Supply

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

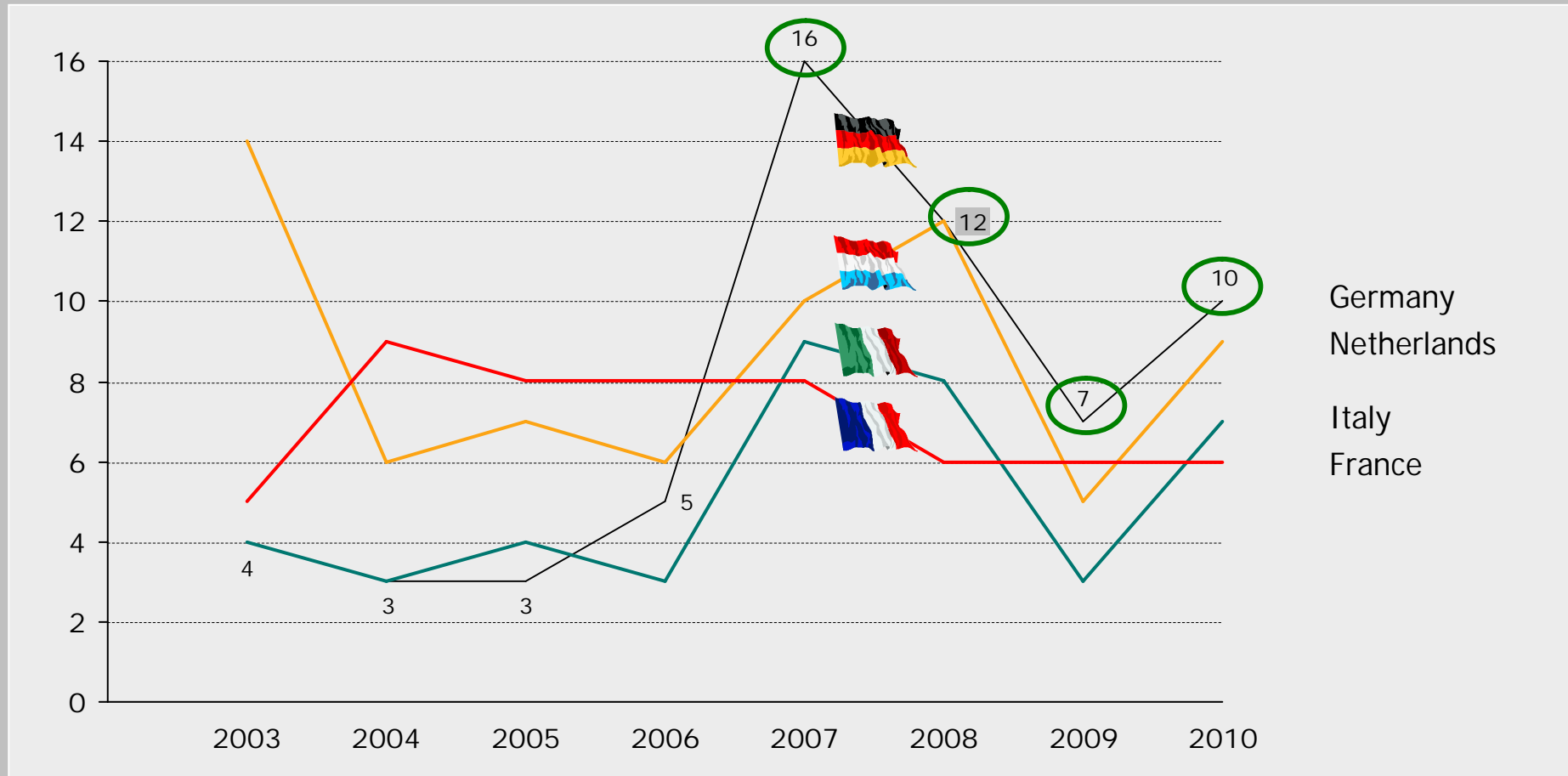


## Demand



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

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# Project design

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## Aim of project

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


## Target group


Persons 18 years + with Internet-Access


## Methodology

Online-Questionnaire

## Sample sizes

Germany   
n= 6,199 persons

UK   
n= 4,116 persons

NL   
n= 10,804 persons

## Fieldwork

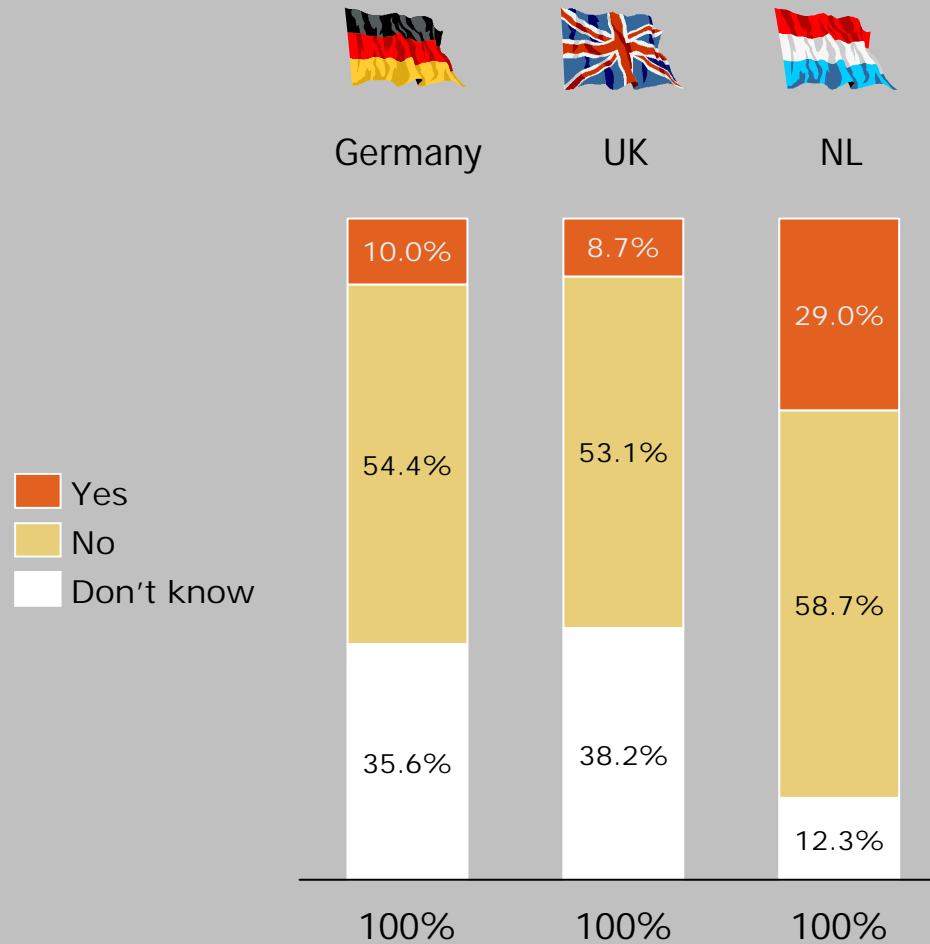
Aug. 2010

Oct. 2010

Nov. 2010

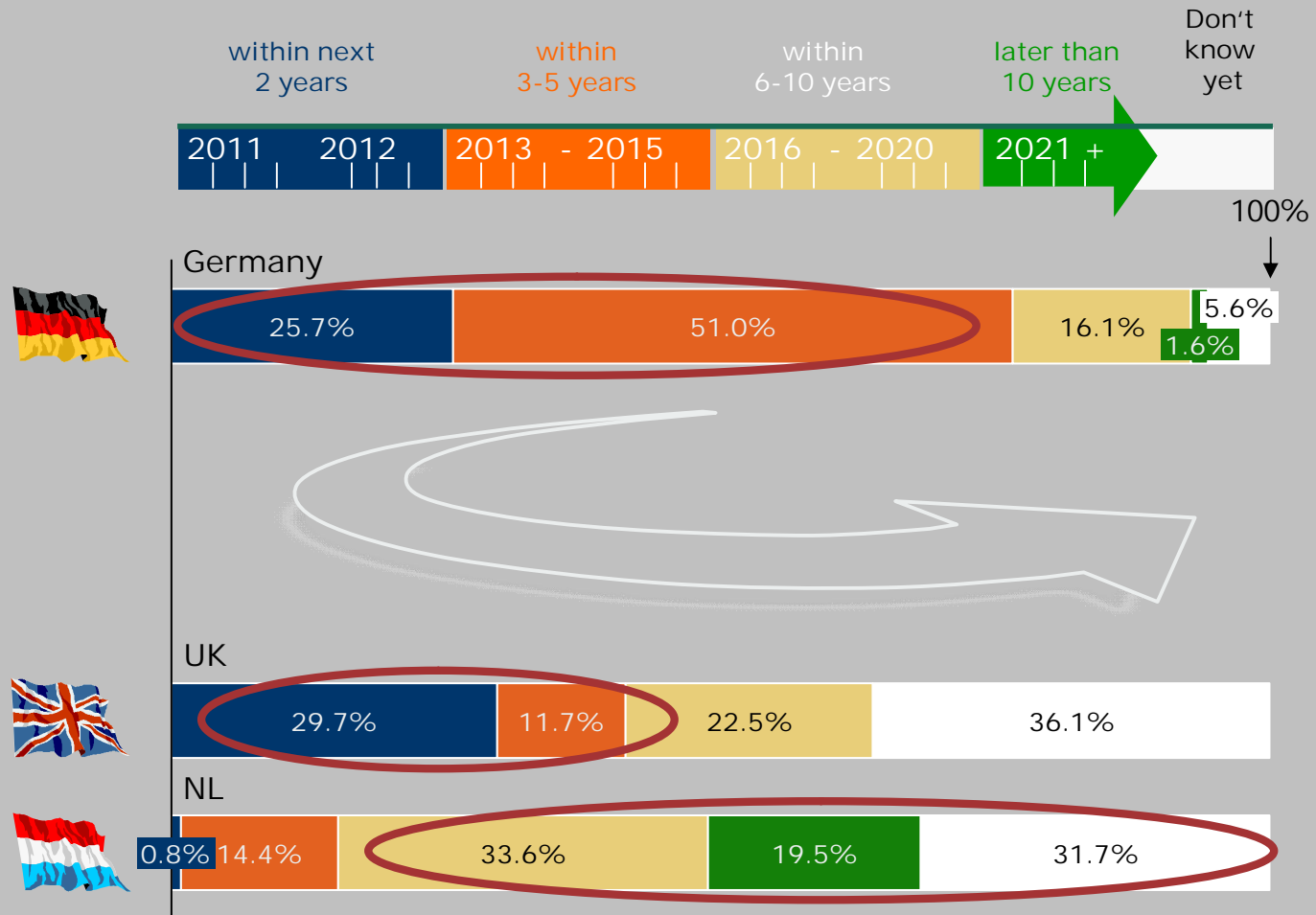
# High general purchase intention rate of an electrical vehicle amongst consumers

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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 allows achievement of governmental goal of 1 Mio. cars already in 2015!

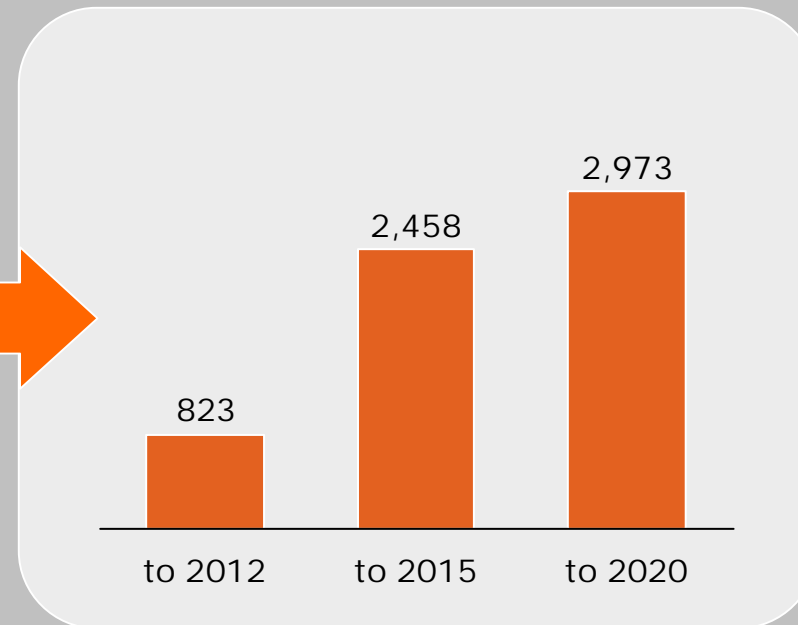


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Purchase intention

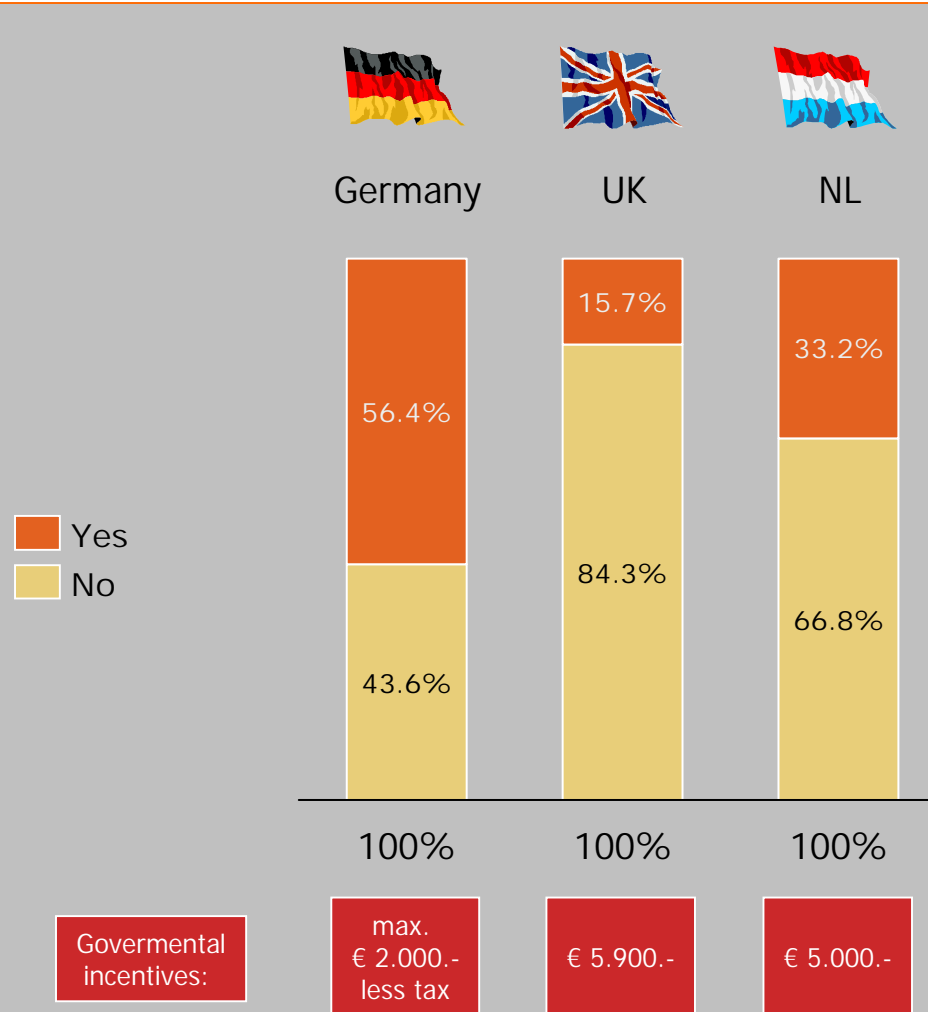
Sales potential (in 1,000 vehicles)  
(Basis: People with purchase intention)

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



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

Willingness to pay a higher price achieves highest rate in Germany\*: every 2nd purchase intender accepts a higher price!



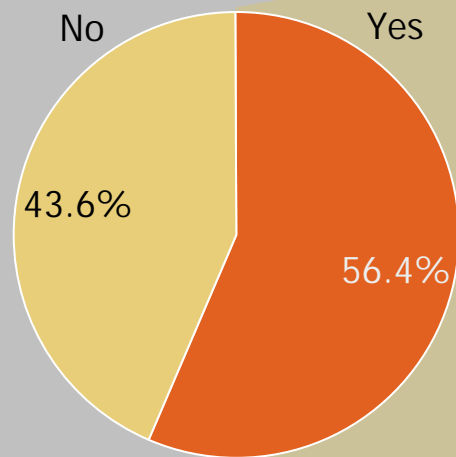
\* only persons with purchase intention

Basis: Adhoc-Online survey in 2010



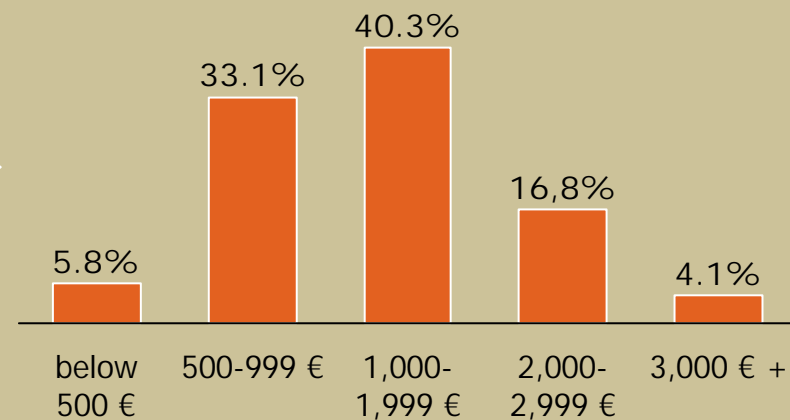
# Willingness to pay a higher price is up to 2.000 € amongst 80 % of purchase intenders in Germany

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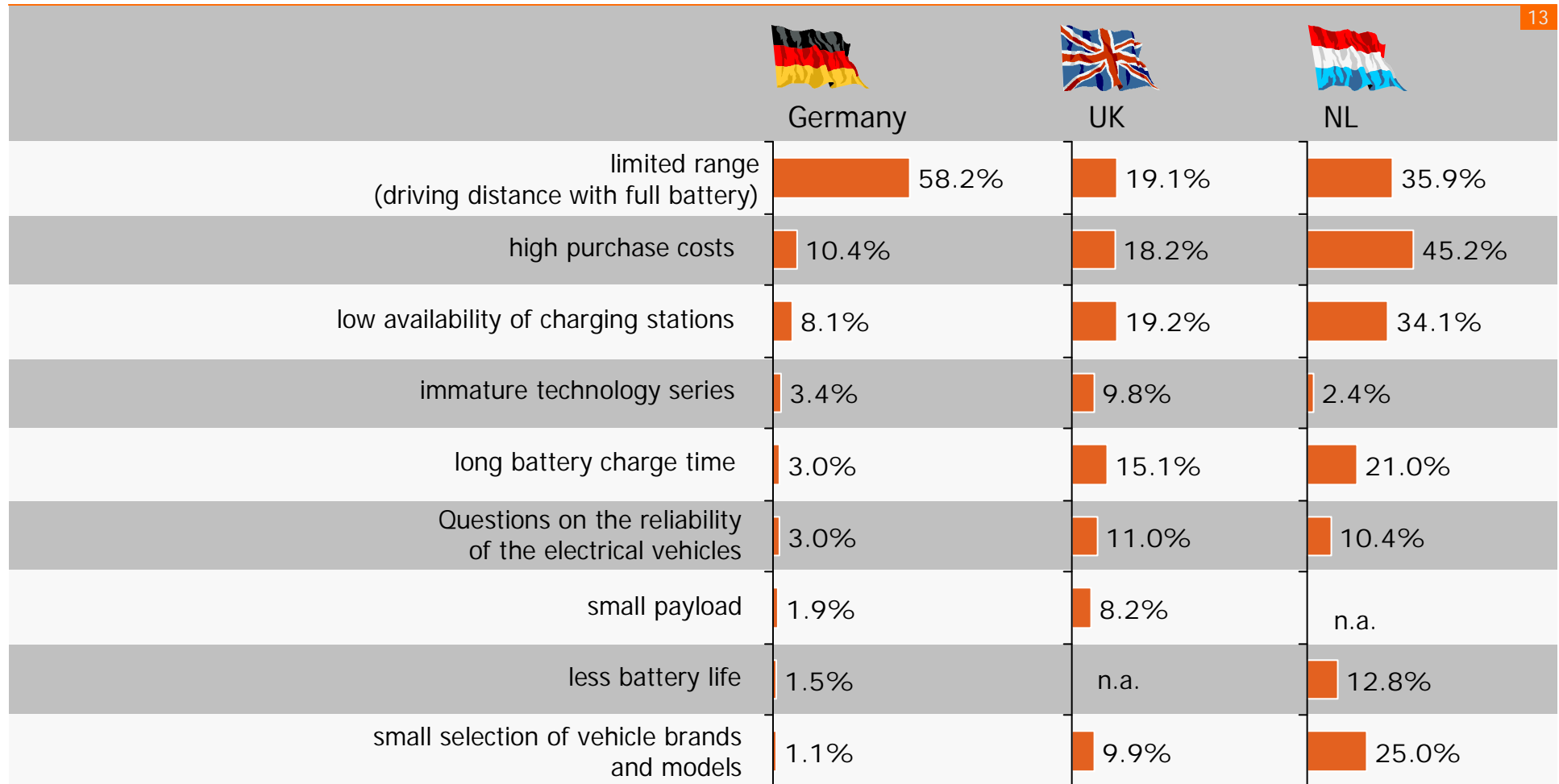
→  
=100%

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 barriers for not planning to purchase an electrical vehicle are the assumed limited distance and the high purchase costs

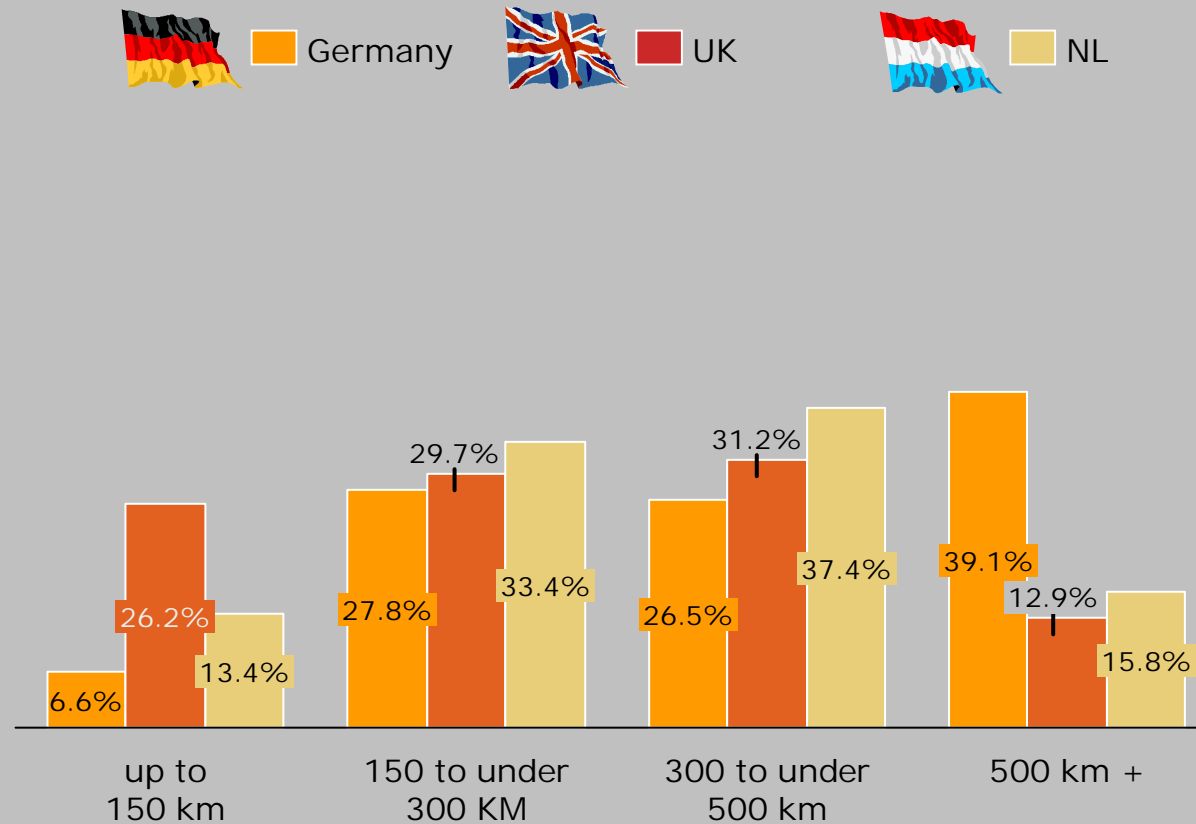


\* only persons with purchase intention

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

## Conclusion

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### 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 powered 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!



Herbert Lechner  
GfK SE, Panel Services Germany  
Division Manager GfK Mobility  
Tel.: +49 911 / 395 - 3668  
Fax.: +49 911 / 395 - 4433  
E-Mail: [herbert.lechner@gfk.com](mailto:herbert.lechner@gfk.com)

