CONSUMER ATTITUDES TOWARDS MOBILITY – GERMANY – 2024

The rising cost of living has caused many Germans to switch to more affordable means of transport in their everyday life. Brands across categories can benefit from this by exploring the potential of newly emerging travel hubs (eg pop-up stores at multimodal mobility stations).

Dr. Jennifer Hendricks,
Senior Analyst - Consumer Lifestyles, Germany

Consumer Attitudes Towards Mobility - Germany - 2024

This report looks at the following areas:

- Means of transport used in everyday mobility
- Most important mobility requirements
- Mobility behaviours, including the impact of the rising cost of living on consumers' everyday mobility
- Attitudes towards mobility, including consumers' attitudes towards the reputation of cars in Germany and sustainability
- Mobility user typologies; this section entails characterisations of and implications for targeting five identified groups of mobility users, namely Engaged Multimodal Users, Adaptive Car Users, Car Rejectors, Car Enthusiasts and Indifferent Mobility Users

> The rising cost of living has caused many Germans to switch to more affordable means of transport in their everyday life. Brands across categories can benefit from this by exploring the potential of newly emerging travel hubs (eg pop-up stores at multimodal mobility stations).

Overview

45% of Germans say that the **rising cost of livingcaused them toswitch to more affordable means of transport** in their everyday life.

Even though privately owned cars are among the most popular means of transport in Germany (76% of consumers use a car owned by themselves/someone in their household frequently), about two in three Germans agree that the **rising cost of living has made car**

ownership less affordable (eg increased fuel prices). Driven by a gradually increasing CO2 tax, experts expect further significant price increases for fuel over the coming two years.

This opens up chances for alternative mobility providers to **cater to more price-sensitive car usersand Car Rejectors** by providing on-demand ridepooling as an add-on to their services and claiming it as a flexible and affordable alternative to the use of privately owned cars. Also, Mobility as a Service (MaaS) providers can target Indifferent Mobility Users by **increasing their marketing efforts and highlighting the benefits of multimodal mobility** more clearly (eg with the help of illustrative videos).

Tallying with the fact that 45% of Germans think that there should be **a greater variety of services offered at travel hubs**, brands across categories (eg retail, foodservice) are well-placed to **embrace the potential of newly emerging travel hubs**, for example by **increasing brand awareness** with the help of pop-up stores at multimodal mobility stations and urban cable car stations.

Report Content

EXECUTIVE SUMMARY

- The five year outlook for everyday mobility

Market context

- The impact of the economy on consumer mobility
- Growing number of commuters drives demand for mobility
- Car ownership is prevalent in Germany

Opportunities

- Embrace emerging opportunities at travel hubs
- Guide Indifferent Mobility Users towards MaaS solutions
- Consider younger Germans as a key target group for affordable options for using a car

MARKET DRIVERS

The German economy

- 2024 is expected to be more challenging than initially predicted
  - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
  - Graph 2: financial confidence index, 2022-24

The impact of the economy on consumer mobility

- Fuel prices reached a record high...
  - Graph 3: average price per liter, 2022-24
- ...and high inflation continues to affect car users' mobility costs
- Low-income households are hit the hardest by the cost-of-living crisis

Consumer lifestyle characteristics

- More than three quarters of the German population live in urban areas
  - Graph 4: urban population, 1992-2022
- Growing number of commuters drives demand for mobility

Regulatory and legislative changes

- Government initiatives are intended to push public transport
- The German government has withdrawn its subsidy of e-cars

Car ownership

- Car registrations in the German market reach a record high
- Multiple car ownership is growing

Transportation infrastructure

- Public transport infrastructure does not meet consumer demand

  - Graph 5: percentage of population within walking distance of a bus or train stop with at least 28 departures per day vs satisfaction with departures at the nearest bus or train station, 2022
- Shared mobility is only slowly gaining ground in the German market

WHAT CONSUMERS WANT AND WHY

Frequency of using means of transport in everyday life

- Germans prefer more traditional means of transport

  - Graph 6: means of transport used by frequency, 2024
- Younger men use the widest repertoire of means of transport...

  - Graph 7: number of means of transport frequently used, by gender and age, 2024
- ...opening up chances to meet them at emerging multimodal mobility stations
- Düsseldorf embraces the potential of multimodal mobility stations as social meeting places
- Daily car use varies with age
- Younger Germans are a key target group for rental mobility services

  - Graph 8: consumers who typically use selected hired means of transport in everyday life, by age, 2024

Most important mobility requirements

- Reliability wins out over other factors

  - Graph 9: most important mobility requirements, by rank (NET), 2024
- Reliability wins out over other factors
- Keep an eye out for Germany's plans to implement urban cable cars as a reliable means of transport
- Lynk & Co targets better-off car users with a disruptive, highly flexible mobility concept
- Fashion: capitalise on Germans' adjusted mobility habits

Mobility behaviours

- Half of Germans lean towards multimodal mobility

  - Graph 10: mobility behaviours, 2024
- Embrace opportunities to reach new target groups with on-demand services
- Bayerische Eisenbahngesellschaft advertises for on-demand services in rural areas
- Cater to younger Germans with all-in-one solutions
- Examples of local developments with regard to MaaS
- Astonish electric car owners with an extended range of services at travel hubs

- Learn from Austria and embrace the potential of service stations as leisure hubs
- Entice younger parents with children's entertainment in unexpected places

Attitudes towards mobility

- Germans are caught between traditional mobility and the need to adapt
  - Graph 11: attitudes towards mobility, 2024
- Germany's history as a country of cars is deeply rooted in consumers' attitudes
- Jeep capitalises on Germans' association with the car as a symbol of freedom
- Consider younger Germans as a key target group for affordable options for using a car
- Enable car users to fully exploit the potential of privately owned cars with worry-free solutions
- Start-up Leih dir mein Auto provides an easy and worry-free way to share cars among friends and neighbours

Mobility user typologies

- German mobility user typologies
- Group 1: Engaged Multimodal Users (23%)
  - Graph 12: mobility user group, by age, 2024
- Meet Engaged Multimodal Users at innovative travel hubs
- Group 2: Adaptive Car Users (20%)
  - Graph 13: mobility user group, by age, 2024
- Cater to Adaptive Car Users with an extended range of products
- Group 3: Car Rejectors (18%)
  - Graph 14: mobility user group, by age, 2024
- Appeal to Car Rejectors with effortless solutions that make car usage superfluous
- Group 4: Car Enthusiasts (17%)
  - Graph 15: mobility user group, by age, 2024
- Support Car Enthusiasts in keeping car ownership affordable
- Group 5: Indifferent Mobility Users (23%)
  - Graph 16: mobility user group, by age, 2024
- Guide Indifferent Mobility Users towards MaaS solutions
- Get inspired by Austrian project ULTIMOB and make multimodal mobility tangible

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID analysis – methodology
- CHAID analysis

- A note on language

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- A 360-degree view of German markets
- Experienced analysts based in Germany
- Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

Published by Mintel Group Ltd
www.mintel.com
email: store@mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850

MINTEL