

GERMAN CAR CONSUMER – GERMANY – 2024

New technologies and demographic changes are affecting how consumers feel about cars and leading car brands to explore more holistic mobility options.



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German Car Consumer - Germany - 2024

This report looks at the following areas:

- Transportation methods used, by frequency
- Changes in car usage
- Reasons and barriers of car travel
- Attributes associated with cars
- Attitudes towards cars including car ownership as an important part of German culture

Overview

54% of German consumers think it is **better for the environment** to cut down how much you drive **than to switch** to electric cars, peaking at 71% that don't typically travel by car/travel by car less than once a week.

Consumers still face high petrol prices due to inflation, **limiting their enthusiasm to drive their car**. At the same time, 65% think that the **rising cost of living** has made **owning a car too expensive**. Brands need to be sensitive to this and entice cash-strapped consumers by **highlighting different payment options** and the **long-term savings of lower running costs**.

Younger consumers obtained **fewer driving licences** in recent years, reflecting the rising cost of learning to drive, as well as changing mobility behaviours and environmental concerns. In response, car brands are shifting from a pure focus on selling cars, to providing access to a holistic range of transport options.

Tapping into **other areas of mobility** than the car is a way to **maintain engagement from urban consumers**. This can work by reinforcing car sharing with test drives and by



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cooperating with car pool companies or shuttle services. Providing access to vehicles as and when they are needed, can fit into the flexibility of modern lifestyles.

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Report Content

EXECUTIVE SUMMARY

Market context

- Price rises are impacting Germans' mobility behaviours
- Urbanisation demands a more innovative approach to car access
- Fewer young people are getting a driving licence

Opportunities

- Increase loyalty by leveraging consumers' emotions for German car culture
- Tap into new mobility options to reach urban consumers
- Capitalise on fun to engage the young

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - 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, 2022-23
- High petrol prices limit Germans' enthusiasm to take the car
 - Graph 3: average price per liter, 2021-23

Regulatory and legislative changes

- Cut in government funding for electric transition
- Government initiatives drive consumers towards alternative transport options

Driving licence trend

- After a pandemic-induced low, more driving licences were issued...
- ...but fewer younger consumers are getting them
- The decreasing number of young people with driving licences poses a threat to the car industry

Car ownership

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

Living situation

- Growing urbanisation is changing how consumers view cars

E-mobility

- Sustainability concerns are not the main driver for buying an electric car

WHAT CONSUMERS WANT AND WHY

Transportation methods used

- Privately owned cars are the most widely used transport option for daily usage
 - Graph 4: transport options by frequency, 2023
- Multi-modal transport usage for frequent travel in younger age groups
 - Graph 5: repertoire of frequent travel, 2023
 - Graph 6: repertoire of frequently travelling by 4+ types of transport, by gender and age, 2023
- Reach young men with a multi-modal strategy
- Daily car usage prevails in mid-age groups
 - Graph 7: car usage frequency, by age, 2023
- Position car time as wellness time
- Frequent car travel is highest among Germans living in rural locations
 - Graph 8: frequent travel by own car/owned by someone in household, by area, 2023
- Target rural areas with marketing activities around fuel economy
- Combine forces with carpool companies to reach Germans living in cities
- ADAC partners with carpool company twogo

Changes in frequency of car travel

- German drivers are driving less
- Younger consumers drove more by car
 - Graph 9: changed frequency of travel by car, by age, 2023
- Bond the young to cars by targeting them with gamified car entertainment
- BMW taps into in-car gaming with the AirConsole

Car usage

- Consumers value the flexibility of cars
 - Graph 10: car usage, travelling by car is., 2023
- Tap into a desire for autonomy and freedom
- Dacia celebrates the autonomy of car travel

Barriers to car usage

- Hesitation towards car usage rooted in limited access

German Car Consumer – Germany – 2024

- Offer test drives for car sharing to appeal to Germans with limited car access
- Engage in the environmental debate beyond electric
- Volkswagen wants to engage consumers to switch to electrical vehicles
- Tap into new mobility spaces to overcome barriers to car usage
- MOIA seeks to solve parking space problems in cities

Attributes associated with cars

- Half of Germans associate cars with the word 'expensive'
 - Graph 11: associations with cars, 2023
- Capitalise on the fun aspect of driving to reach 18-24 year old consumers
- Opel guarantees fun while driving its newest Corsa
- Reach young men with car subscriptions for luxury cars

Attitudes towards cars

- Germans are split over a driverless future
 - Graph 12: attitudes towards cars, 2023
- Use advances in technology to reassure anxious drivers
- Use consumer emotions for German car culture
- Get inspired by Volkswagen and catch consumers with emotions

APPENDIX

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

- Products covered in this Report
- Abbreviations
- German population growth
- Consumer research methodology
- A note on language

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