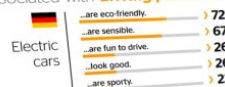




Electromobility is not yet associated with driving pleasure.



# Driving beyond 2020 – Reason or Emotion?

## Questions to Answer

- › How significant is driving worldwide?
- › In the future, will the motives behind mobility be more rational than emotional?
- › Do young people even want to own cars anymore?
- › How accepted are new technologies like electromobility, digitalization, and automated driving?

# International Perspective and Project Modules

## Different Points of View Combined

France



USA



Germany



Japan



China



Representative survey  
1,800 (GER) and 2300 (USA)



Focus groups



Online interviews of car use and Technology  
(400 per country, old and young contrast groups)

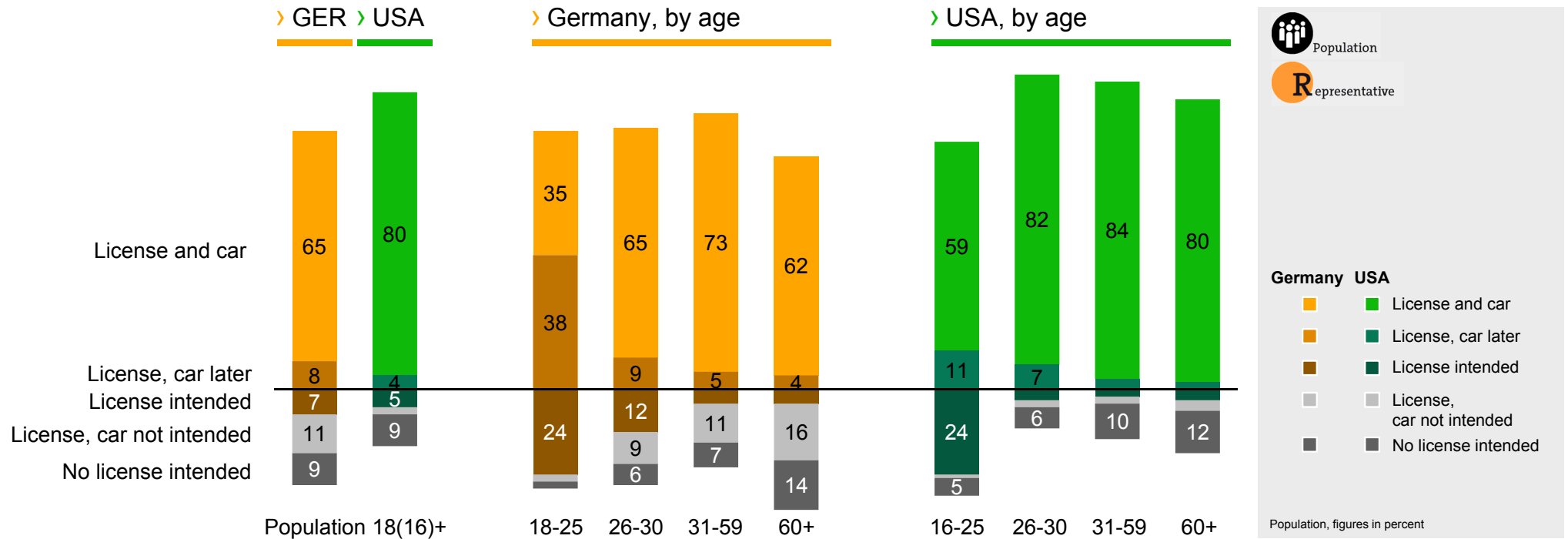


Online interviews  
with experts

# Driving & Ownership

# Share of Driving License Holders and Car Usage

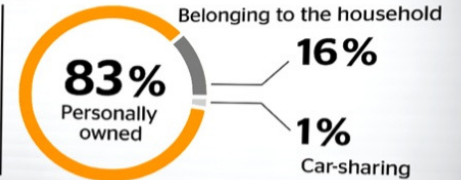
## Later Than in Earlier Decades, but Still Basic







**Private vehicle ownership**  
continues to be **hugely popular.**



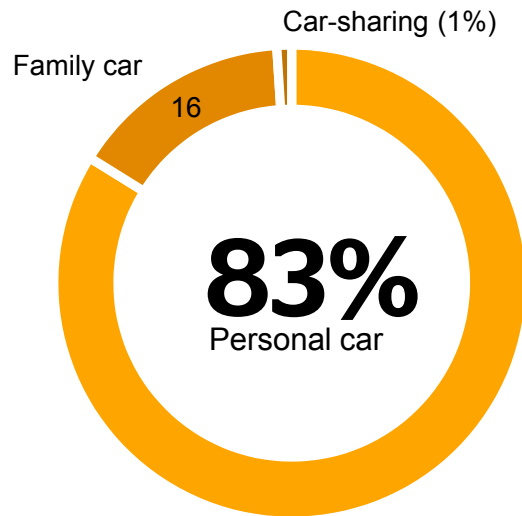
Source: Continental Mobility Study 2015

**“Owning my own car  
makes me flexible and free.”**

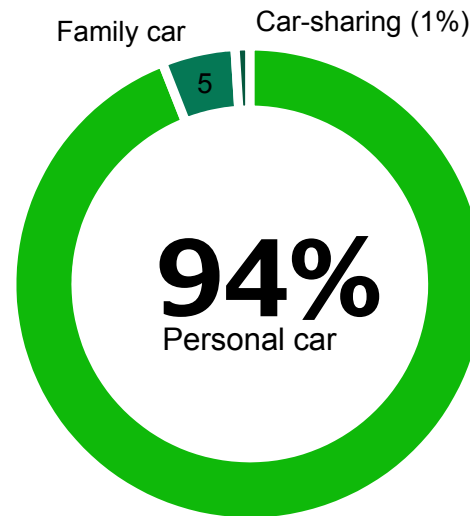
# Ownership of the Car Used

## Most Drivers Use a “Personal Car”

› Germany



› USA



Population



Representative

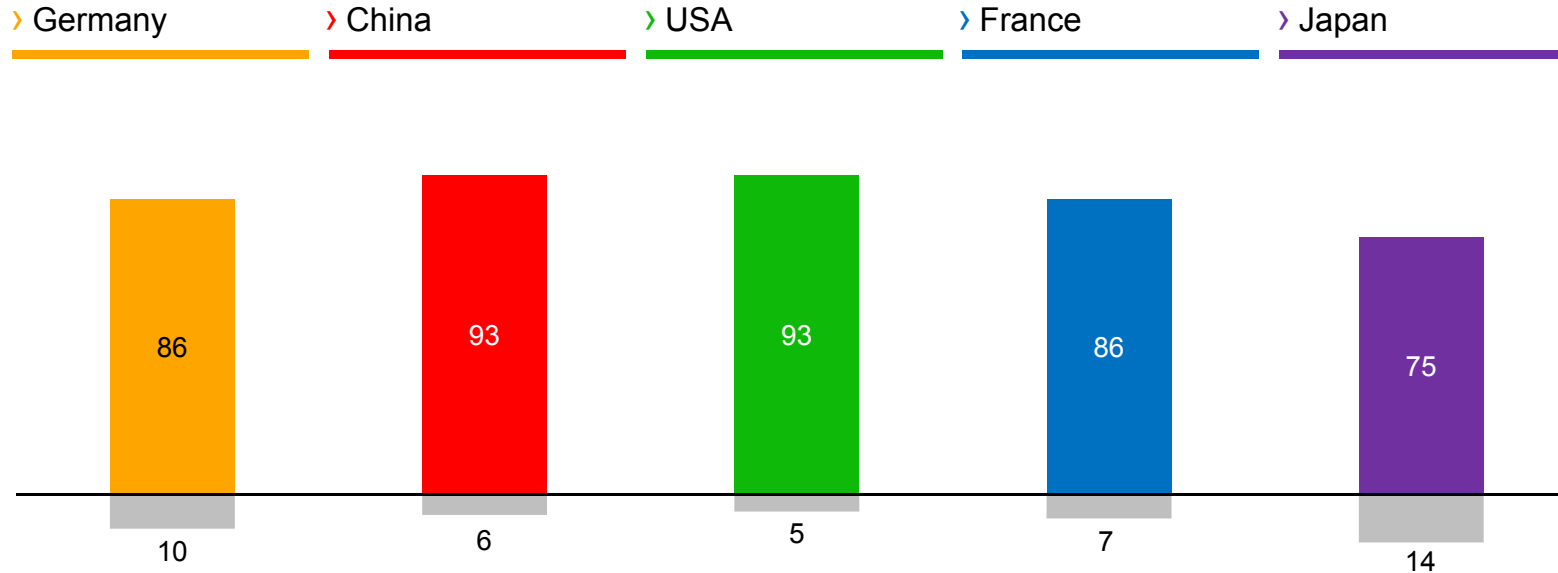
### Question:


Is the car you usually use ...  
1: your own car,  
2: a car belonging to your household, family or a friend,  
3: a rental or car sharing car


Figures in percent


# Preferred Model of Car Ownership

## Owning Most Preferred





 Population – 18-30 and 60+

 Qualitative

 Online

**Question:** Given your available budget and your everyday needs: Do you prefer to...

 own a car for yourself

 something else

Figures in percent;

"something else": "lease a car for yourself", "rent a car whenever you need it", "use a car of a car sharing organization";

Answer category "I do not need a car" and "I would rather not say" not displayed



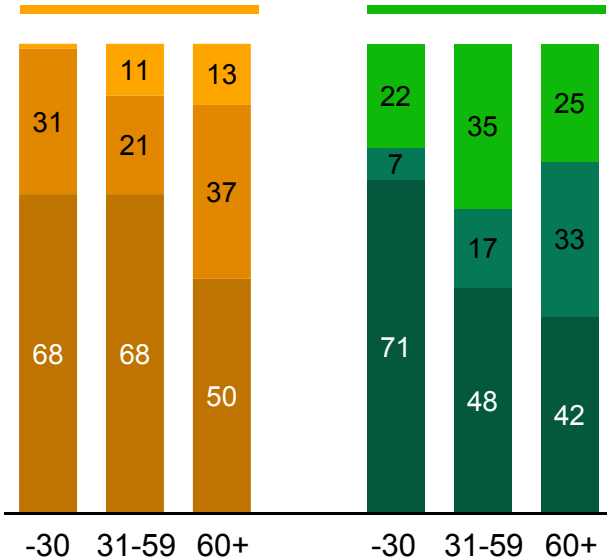
# Driving License and Car Ownership

## Financial Aspects Most Important

Reasons for no driving license

› Germany

› USA

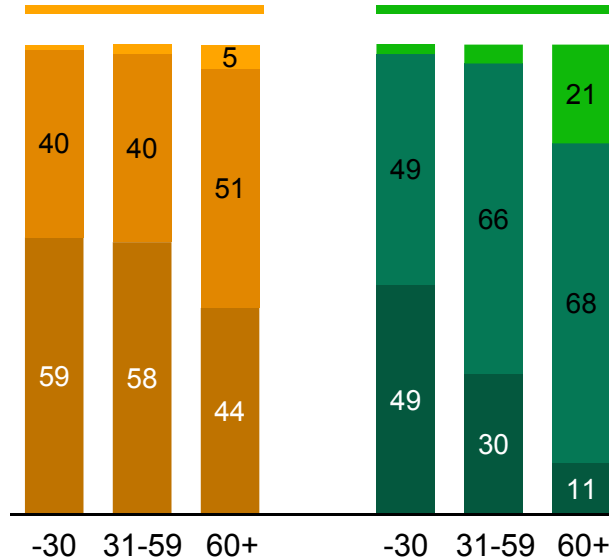


NON-driving-license-holders (16% in Germany / 14% in the USA)

Reasons for no personal car ownership

› Germany

› USA



Drivers WITHOUT a personal car (17% in Germany / 6% in the USA)





German people **enjoy driving -**  
in spite of rising **traffic congestion.**



Driving in  
day-to-day life

...is convenient.

> 97

...is fun.

> 93

...is sensible.

> 92

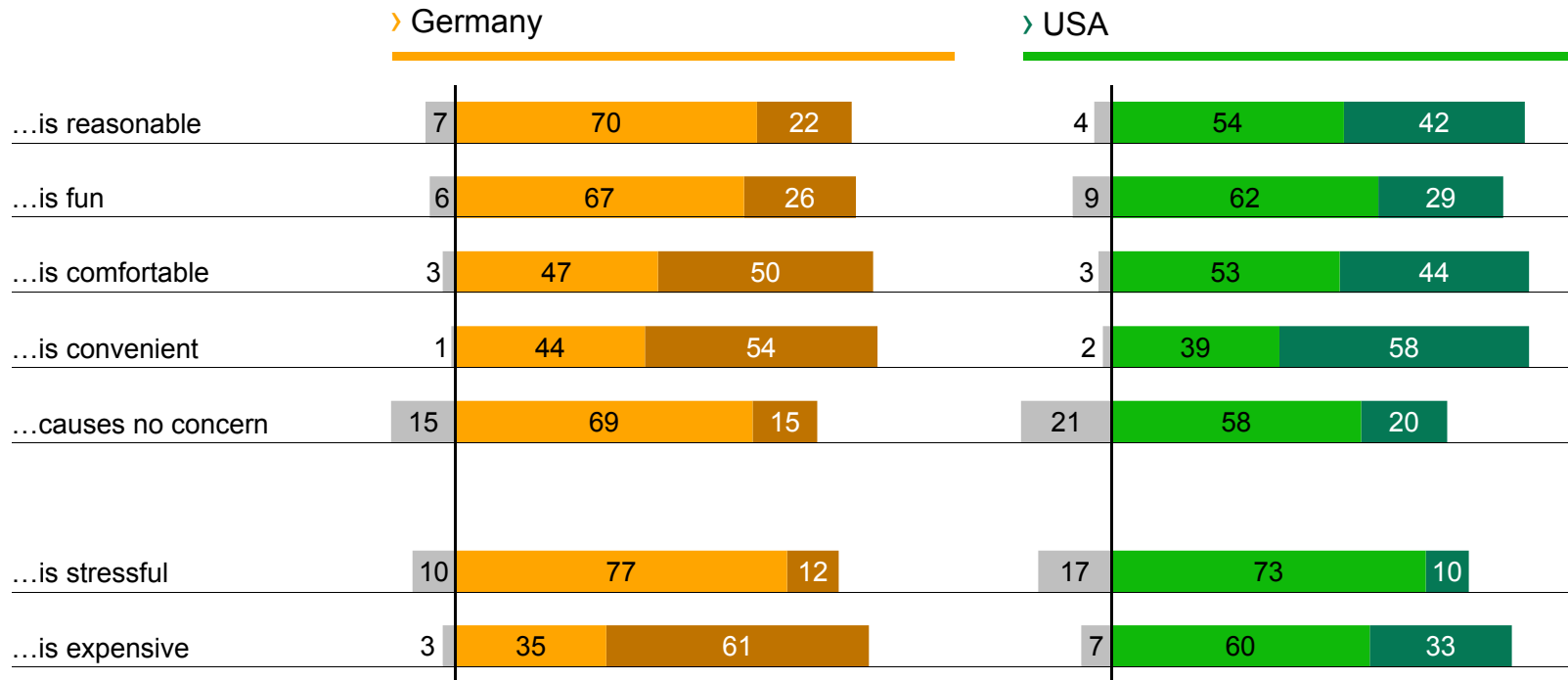
Source: Continental Mobility Study 2015

in %

“Driving is  
convenient and fun.”

# Driving in Everyday Life

## Convenient, Comfortable but Also Expensive



Population  
 Drivers  
 Representative

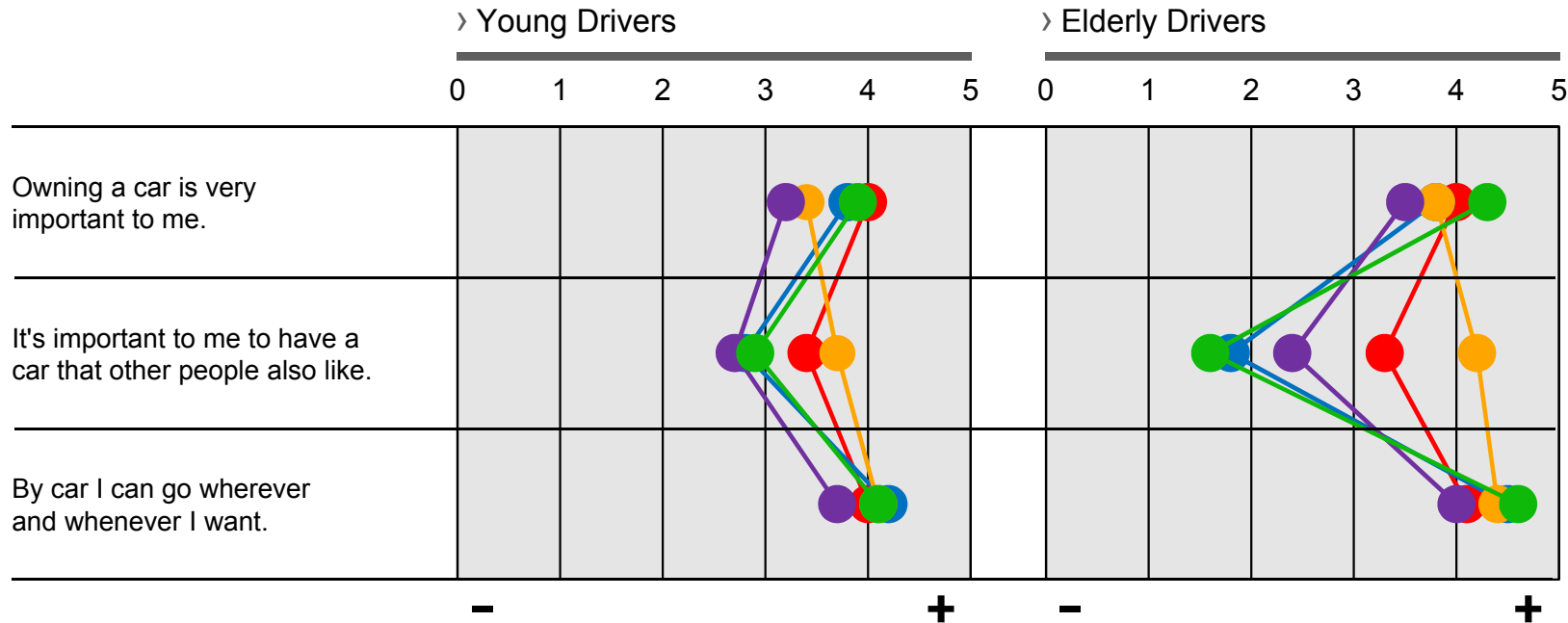
**Question:** Driving in everyday life is experienced differently. How do you experience driving? Would you say: Driving in everyday life ...

**Germany USA**  
■ ■ always  
■ ■ from time to time  
■ ■ never

Figures in percent ; answer category "I am unable to say" not displayed

# Driving in Everyday Life – International Perspective

## Free to Go Whenever, Wherever



Population – 18-30 and 60+  
 Qualitative  
 Online

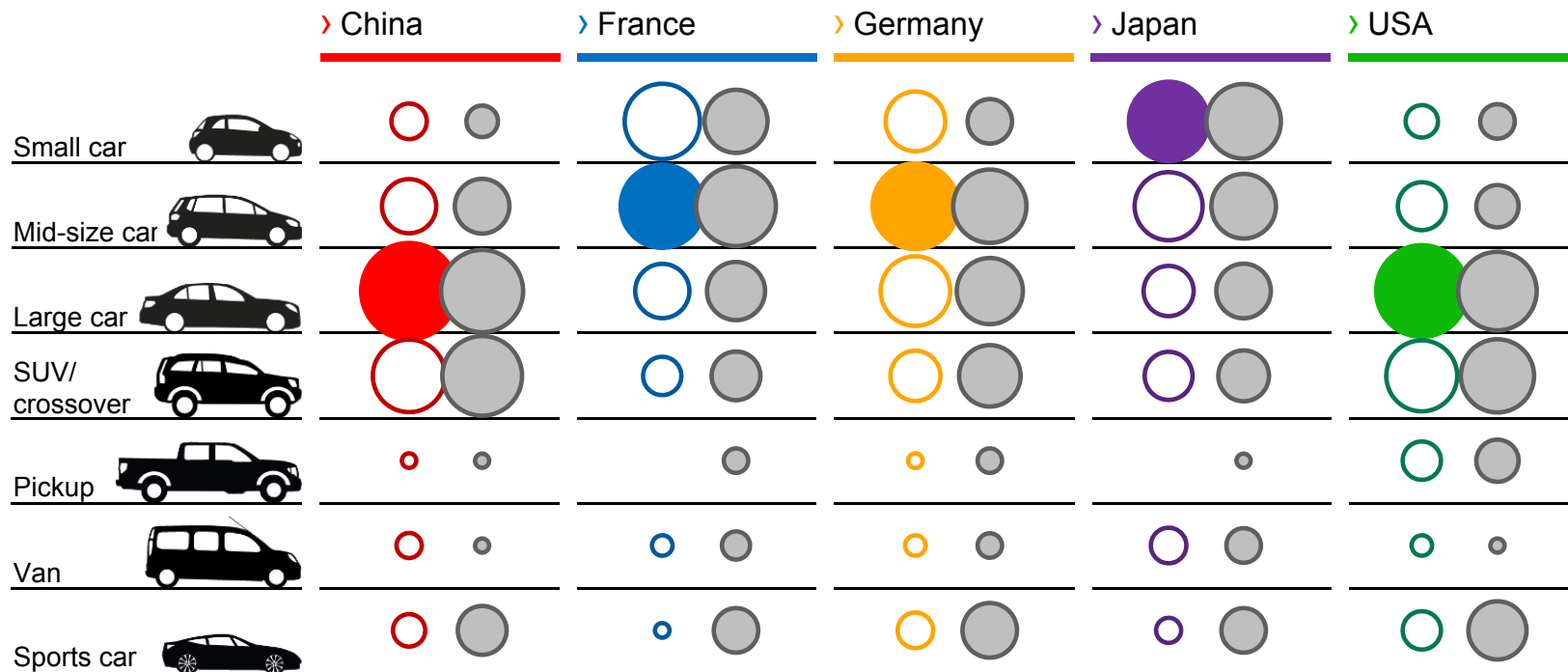
**Question:** To what extent do you agree with the following statements about driving?

● Germany  
● USA  
● France  
● Japan  
● China

Mean values of "0=I don't agree at all" to "5=I agree completely"

# Preferred Car

## All-Rounder Still First Choice



Population – 18-30 and 60+  
 Qualitative  
 Online

**Question:** Given your available budget and your everyday needs: which of the following cars would you rather buy?

Germany    China  
 USA    Japan  
 France

And now regardless of your available budget and your everyday needs. Which of the following cars would you prefer - given the same equipment and features?

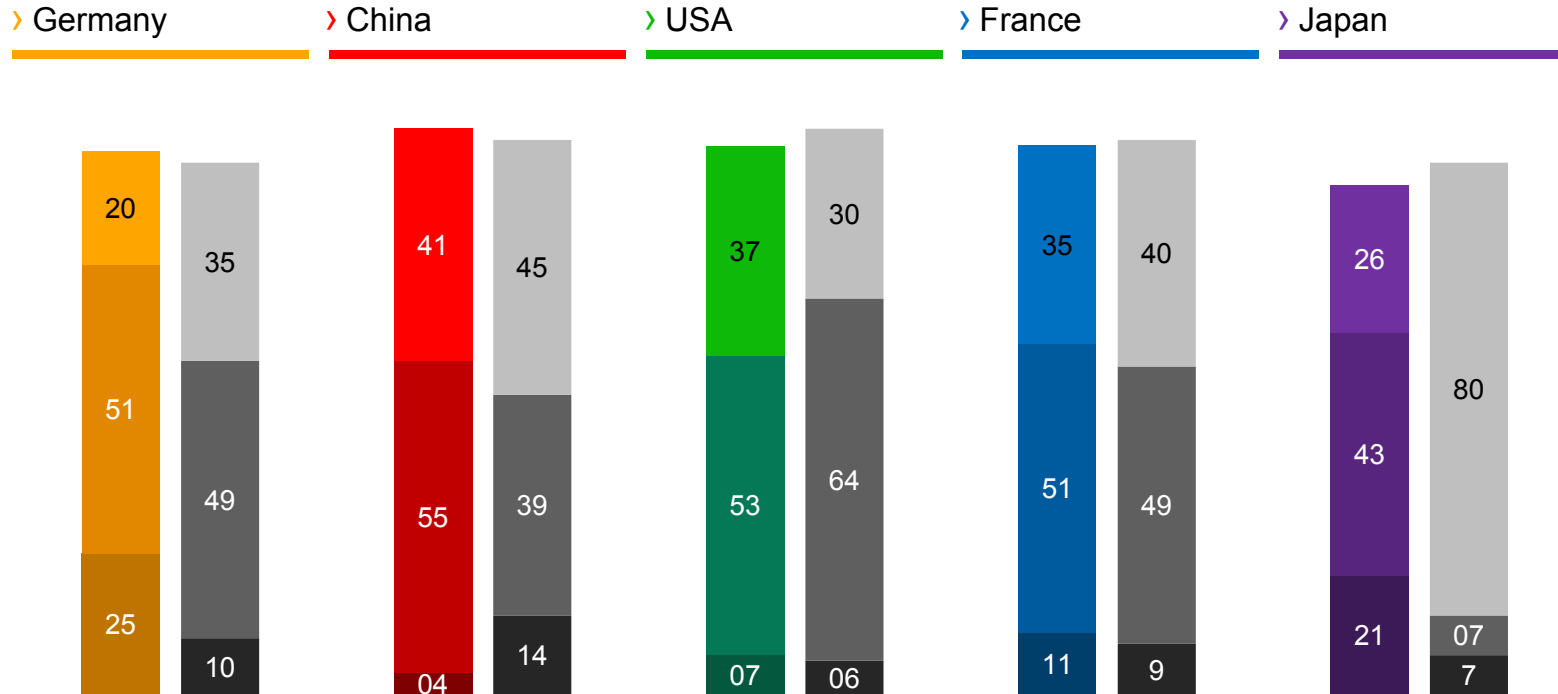
Preferred Car

Figures in percent; answer category "I do not need a car", "I am afraid I could not afford a car" and "I would rather not say" not displayed



# Comparison of Groups

# Importance of Owning a Car – Compared to Parents Rather More Important Today



Population – 18-30 and 60+  
 Qualitative  
 Online

**Question:** When you think of your parents and yourself: Would you say that owning a car is for you compared to your parents...

**young drivers (18-25 years)**

more important  
 more or less the same  
 less important

**elderly drivers (60 years and older)**

more important  
 more or less the same  
 less important

Figures in percent; answer category "I am unable to say" not displayed

Owning your own car as a first choice is not a question of age.



Ownership is preferable

18-30 years

> 85

> 60 years

> 93

Source: Continental Mobility Study 2015

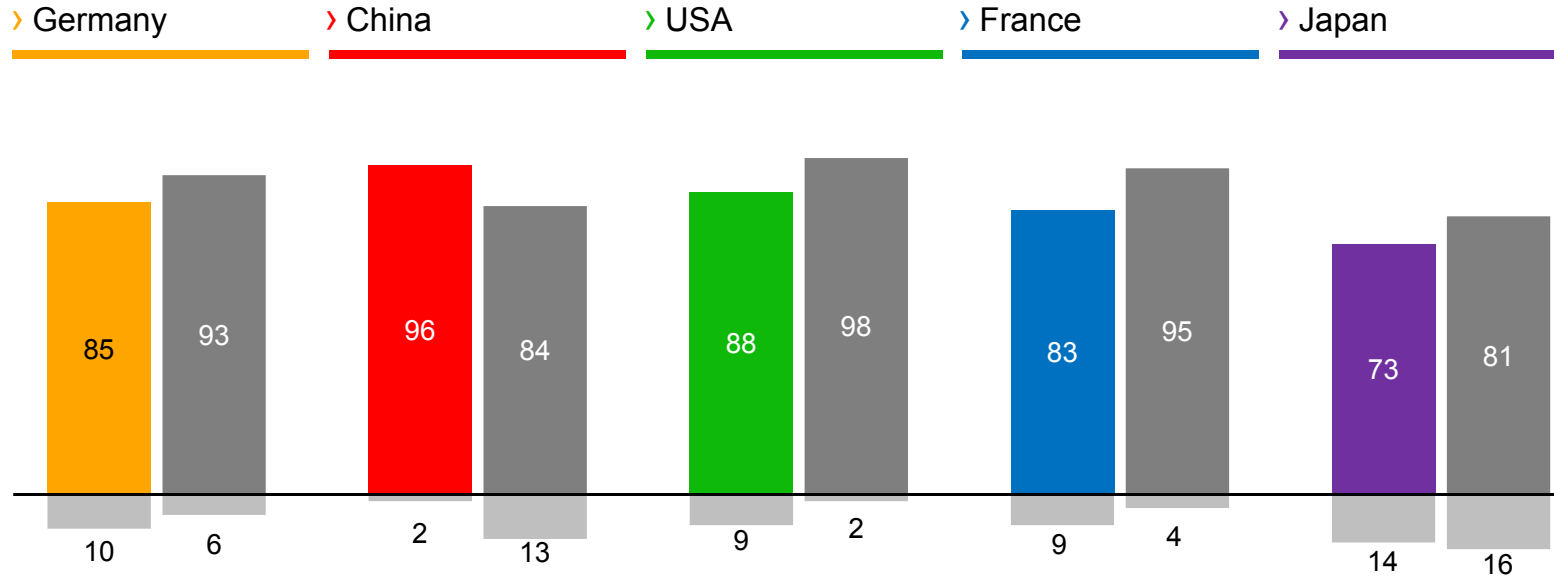
in %



“Finances permitting, we don't want to forgo owning our own car.”

# Preferred Model of Car Ownership

## Owning Preferred – Even by Younger Generations



Population – 18-30 and 60+

Qualitative

Online

**Question:** Given your available budget and your everyday needs: Do you prefer to...

own a car for yourself

something else

**young drivers (18-25 years)**

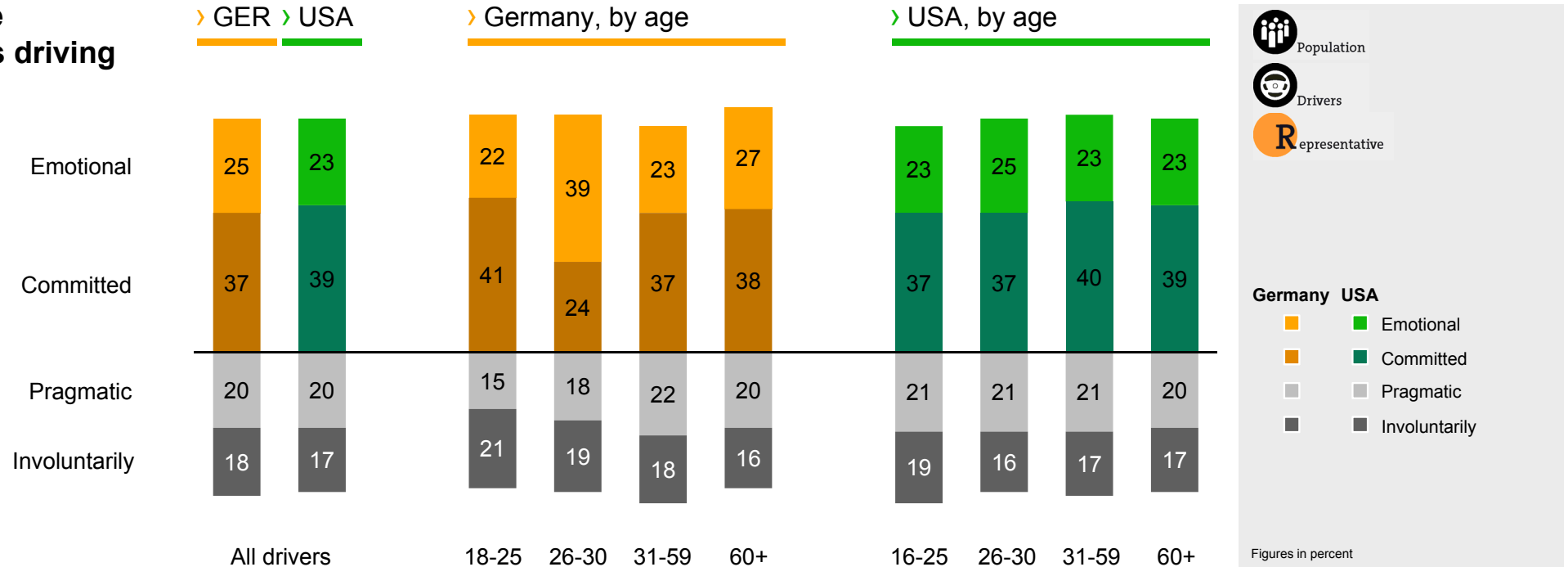
**elderly drivers (60 years and older)**

Figures in percent; "something else": "lease a car for yourself", "rent a car whenever you need it", "use a car of a car sharing organization"; answer category "I do not need a car" and "I would rather not say" not displayed

# Car Driver Segmentation – Germany vs. USA

## Similar Results, Low Differences between Age Groups Only

Attitude  
towards driving





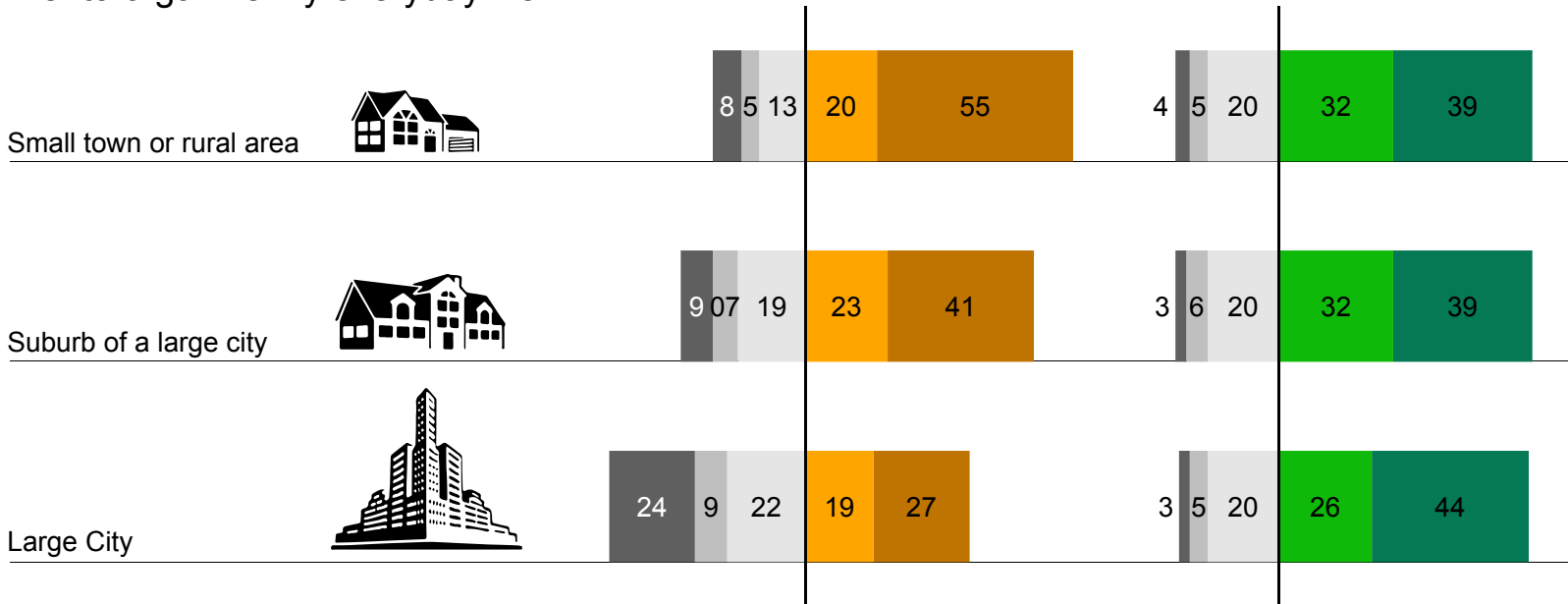
# Living Place

## Effect on Car Dependency Lower Than Expected

Access to a car is necessary for me to organize my everyday life.

> Germany

> USA





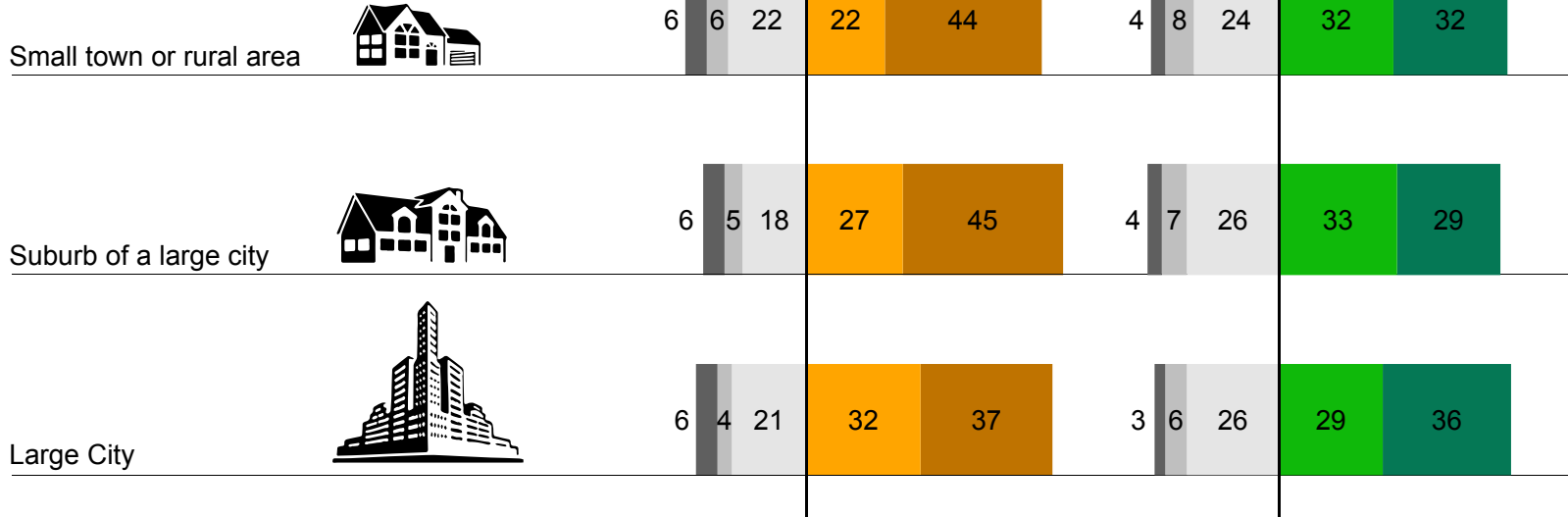
# Living Place

## No Effect on Joy of Driving

Driving a car  
is something I enjoy.

> Germany

> USA



Population
 Drivers
 Representative

**Question:** Driving a car is something I enjoy.

**Germany**
**USA**

5 = I agree completely
 4

3
 3


2
 2

0+1=I don't agree at all
 0+1=I don't agree at all

Figures in percent; answer category "I am unable to say" not displayed

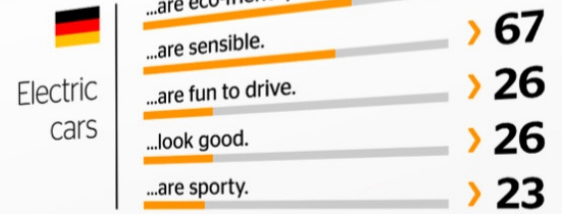
# New Technologies





“Electric cars are good for the environment, but they aren't fun to drive.”

Electromobility is **not yet** associated with **driving pleasure.**



Source: Continental's 2015 Mobility Study

in %



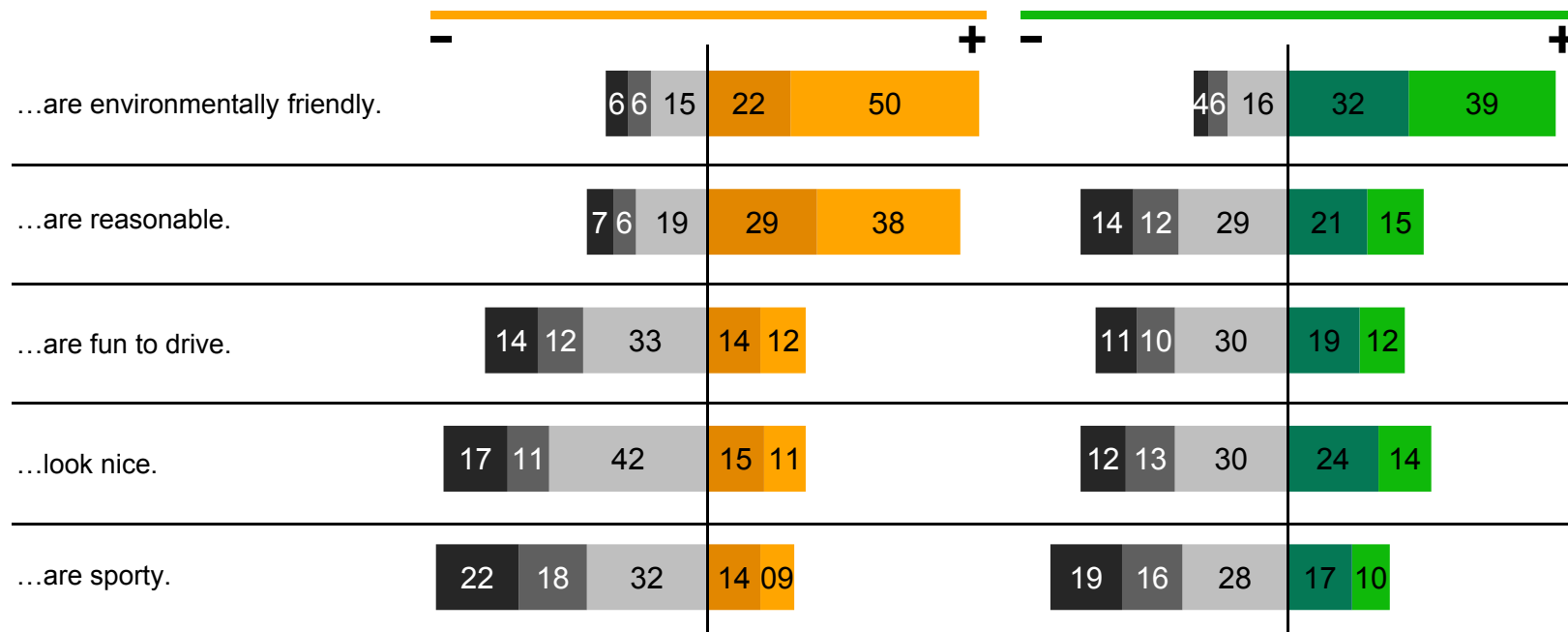
# Assessment of Electric Cars

## No E-Mobility without Emotion

Electric cars...

> Germany

> USA



Population



Drivers



Representative

**Question:** To what extent do you agree to the following statements about electric cars?

If you have no experience with these cars please rate the statement based on what you heard about it or expect from it.

**Germany USA**



Figures in percent; answer category "I am unable to say" not displayed

# Expectations Towards Usage of Electric Cars

## Contrasting Age Groups

	› 16-30		› 31-59		› 60+		
	2011	2014	2011	2014	2011	2014	
<1 year	0	1	0	0	0	1	› No intention to purchase in the short term across the age groups
1-3 years	3	4	6	5	7	4	›
4-10 years	47	34	46	35	32	29	› Intention to purchase in the medium and long term has declined over time
10 years +	34	31	26	27	11	12	›
Never	12	10	16	17	<b>44</b>	<b>40</b>	› The older people are, the more likely they are to refuse to buy
Only when no other available	0	<b>20</b>	0	11	1	10	› There is a strong rise in passive attitudes (especially among young people!)



Population



Drivers

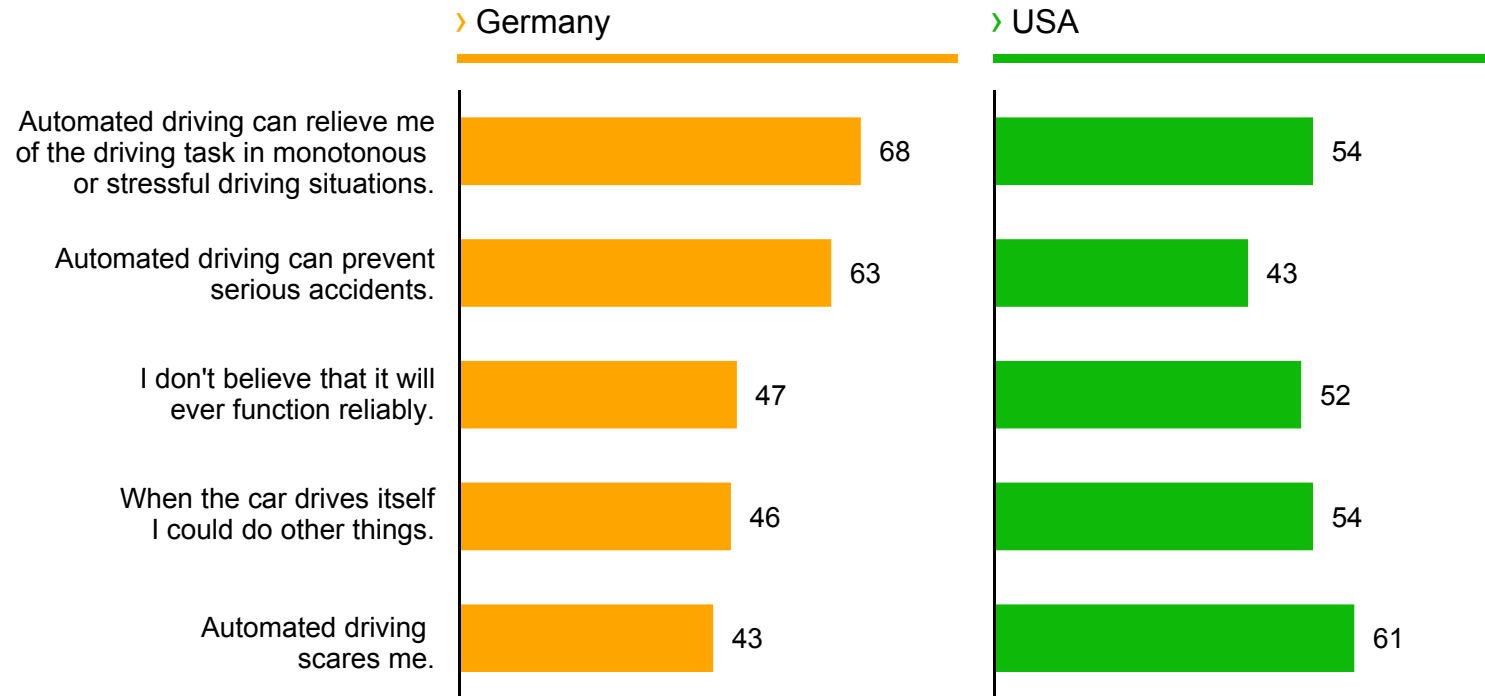





Representative

**Question:** And what do you think: When will you drive a car with an electric drive in your everyday life?



# Assessment of Automated Driving

## Preferred for Monotonous or Stressful Driving Situations



 Population  
 Drivers  
 Representative

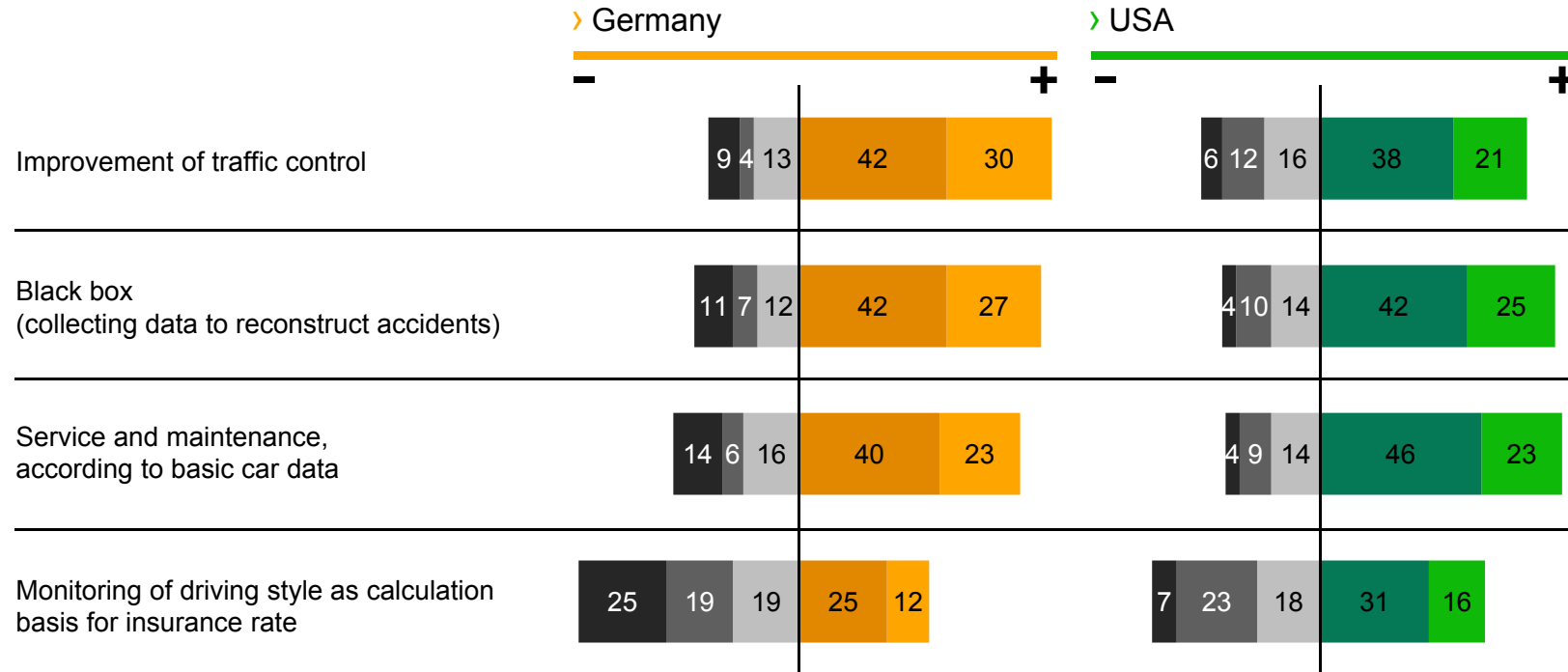
**Question:** One can have different opinions about automated driving. Therefore, we'd like your input on the following statements. Please advise if you agree or disagree with each statement.

**Germany USA**  
  I tend to agree

Figures in percent; answer categories "I tend to object" and "I am unable to say" not displayed

# Assessment of Connectivity Applications

## Acceptance of Digitalization Use Case Based



**Population**  
**Drivers**  
**Representative**

**Question:** Recent car models are connected to the internet and enable the exchange of information between car and environment. How do you rate the following use cases?

**Germany USA**

- very desirable
- somewhat desirable
- not really desirable
- not desirable at all
- unnecessary

Figures in percent; answer category "I am unable to say" not displayed

# Driving beyond 2020 – Reason or Emotion?

## Key Findings

- › Driving is, and will remain, driven more by emotion than reason
- › Car ownership is extremely popular, even among younger generations
- › Above all, driving is more a question of money than of age or location
- › Young people want large, powerful, and prestigious cars
- › Drivers mainly see electric cars as eco-friendly. Only a few consider them sporty and fun to drive. Many older drivers do not want an electric car, and younger drivers increasingly reject them
- › Automation and networking ride high among drivers
- › Data protection is, and will remain, a decisive criterion when it comes to introducing networked services
- › To further increase the attractiveness of cars, there must be further developments in their features in particular – not their form of ownership or marketing. Digitization and automation form the basis here since they have the potential to redefine individual mobility



# Continental Mobility Study 2015

[www.continental-mobility-study.com](http://www.continental-mobility-study.com)