

3F - Global Strategies for Activating EV Consumers

German Emobility User survey 2015 - Reasons why even electro mobility friendly people are not buying electric cars!

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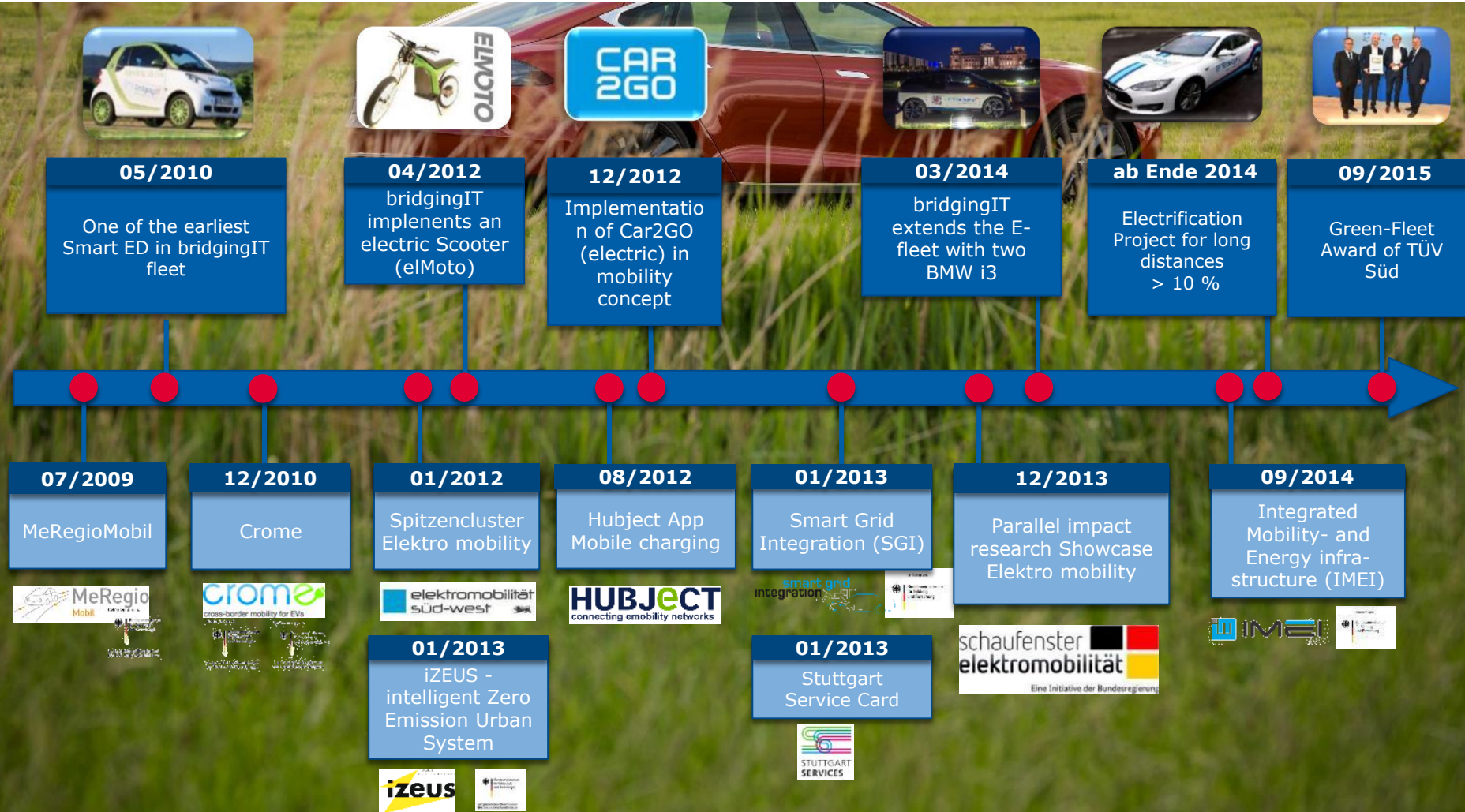


- **BridgingIT GmbH** is an IT consulting company founded in 2008
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- Well-developed application and technology partner network

nearby – independent – sustainable



More than 6 yers electromobility experience





1. The showcase program

2. Targets and Setup of German User survey 2015

3. Results

4. Conclusion



1. The showcase program





- 4 showcases in 6 German states
- 145 projects (90 federally sponsored, 40 state sponsored, 15 associated federally sponsored)
- Duration 2012 – 2016
- Vehicles:
2.500 cars (90% BEV),
1.000 pedelecs,
8 lightweight vehicles
20 motorcycles
65 busses
71 commercial vehicles
15 municipal vehicles
- 2.100 charging stations

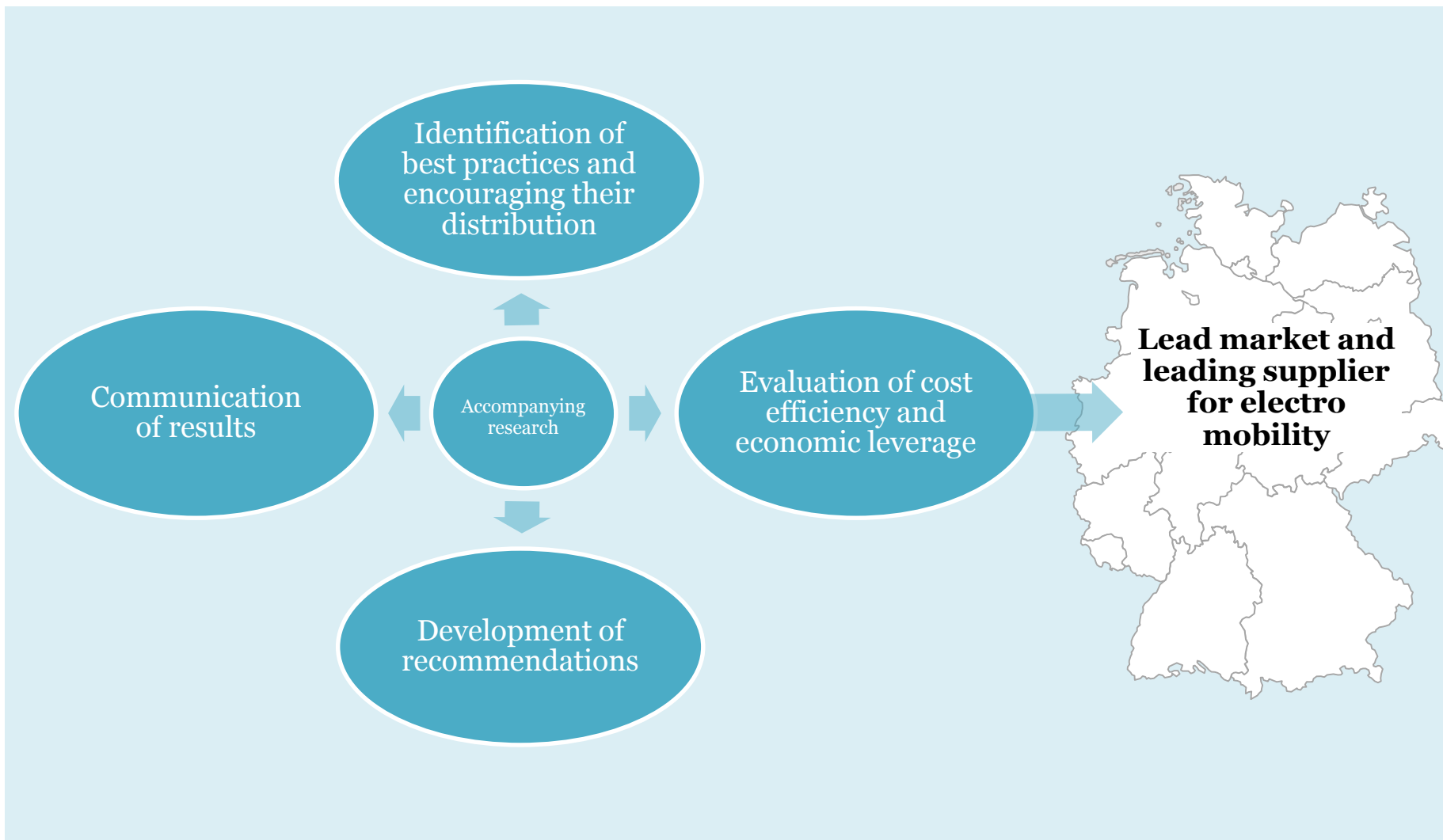


eMobilität
in Niedersachsen.

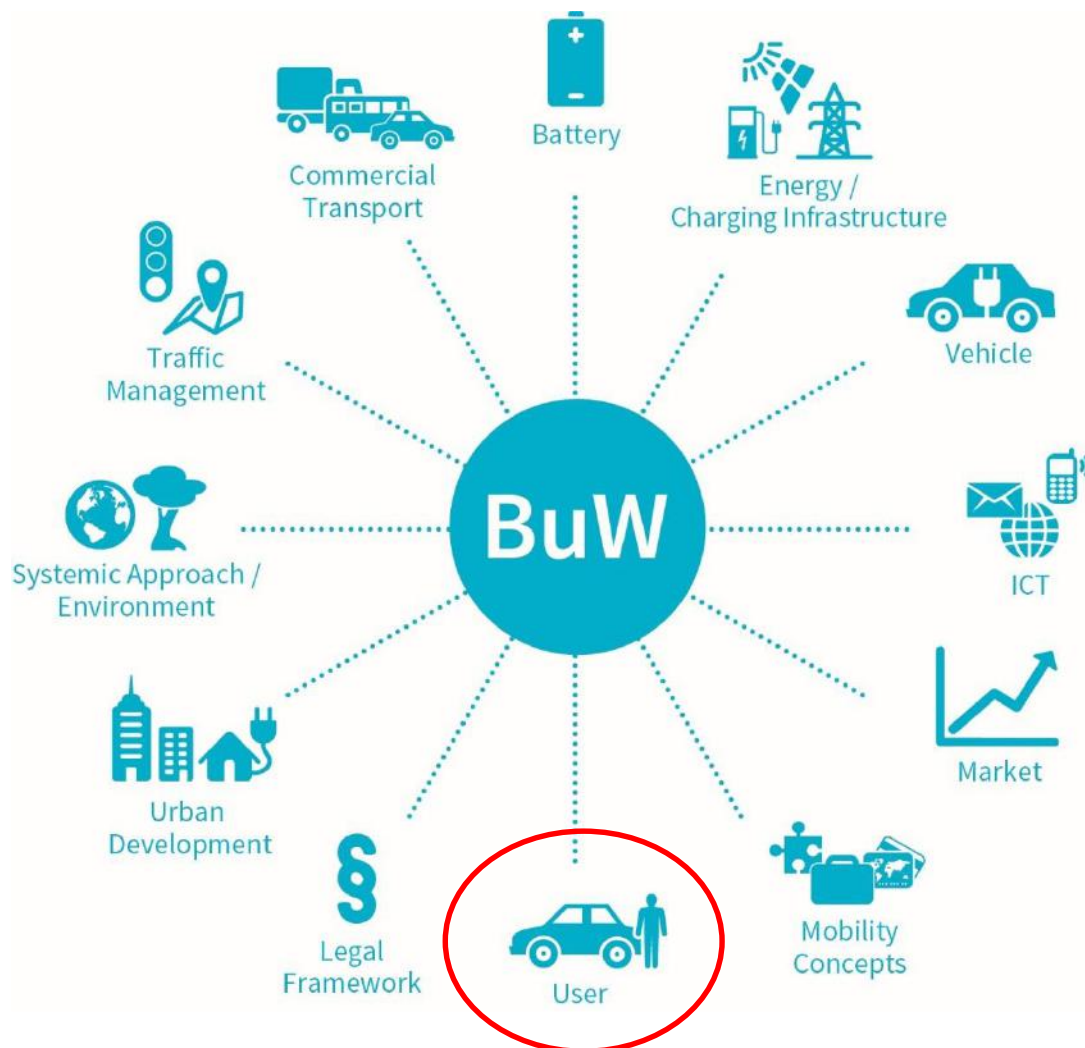


BAYERN – SACHSEN
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12 Cross section issues of accompanying research





EP 01 User Definition Network

EP 10 User Survey

EP 23, 24, 25 User Scenario Flyer: Overview, Commuters and social services



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Only german!



2. Targets and Setup of German User survey 2015





Target:

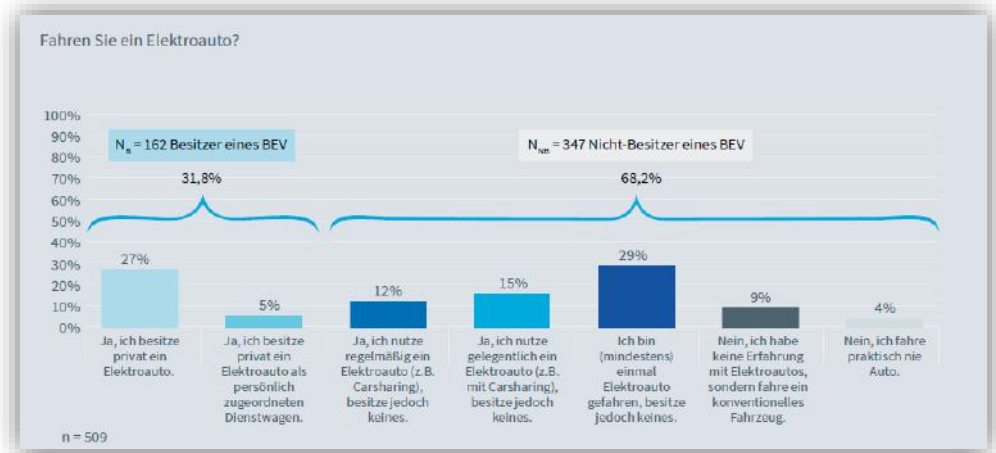
- Analysis of the reasons for or against the decision to buy an electric car
- Development of appropriate measures to support the electro mobility market

Setup:

- Online survey
- Only battery electric cars (BEV) were investigated in the survey, no Plug-In Hybrid cars (no PHEV)
- Persons with high knowledge concerning electro mobility
→ Persons have adequate background and can give valid answers

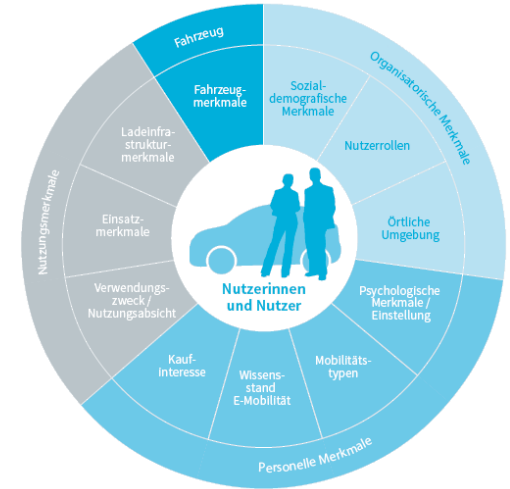
Sample:

- 509 valid Datasets
- 32% Owner
- 68% Non-Owner



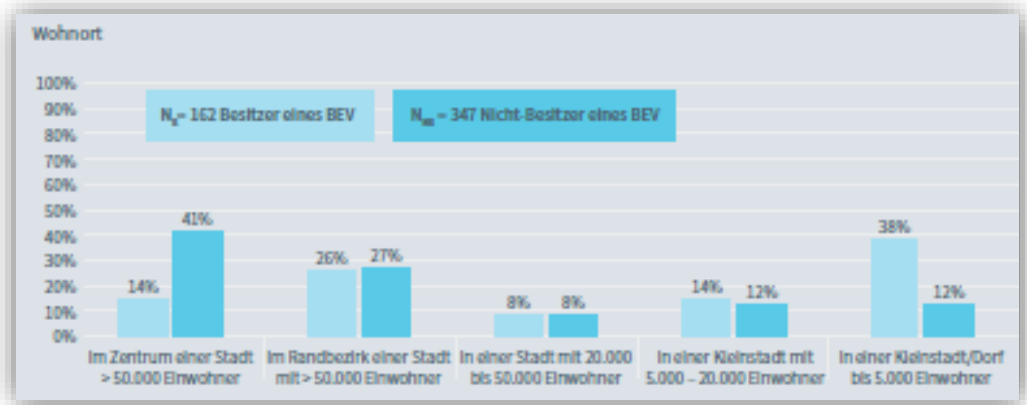
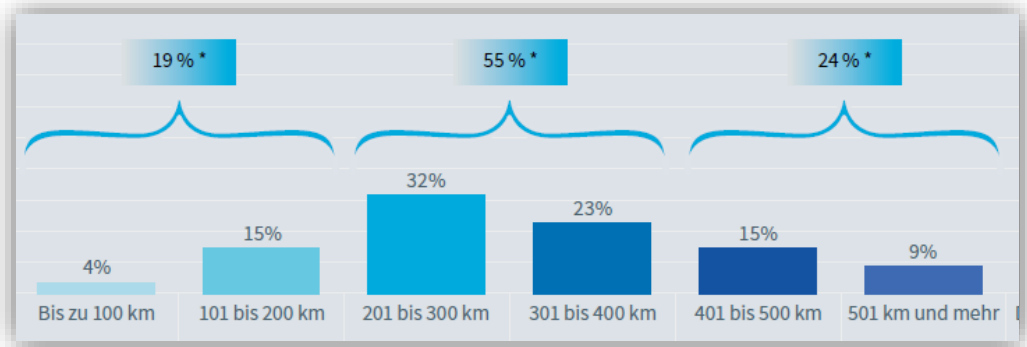


3. Results of User Survey



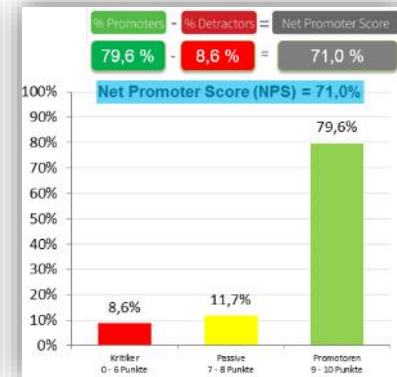
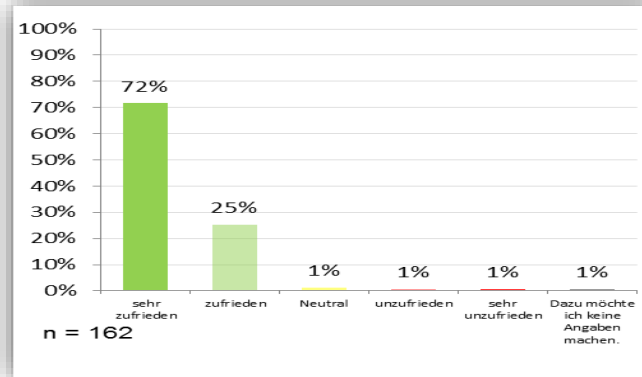


- 80% of asked persons expect a realistic range of more than >200 km (125 mls)
- Electro mobility today is more popular in smaller cities than in large cities
- Parking situation and charging possibility is significant for electric car ownership
- Owner in in larger cities have larger requirements concerning range than inhabitants of smaller cities
- Persons who already have Experience with electric cars, judge the road capability of electric cars better than persons without experience





- 97% of electric car owners are satisfied or highly satisfied with their cars
- The Net Promoter Score with 71% is absolutely outstanding
- Almost every owner has his own parking lot and 82% of them have a charging possibility at home
- Reasons for purchase:
 1. Driving pleasure and driving comfort
 2. Getting experience with electro mobility
 3. Ecologic motivation

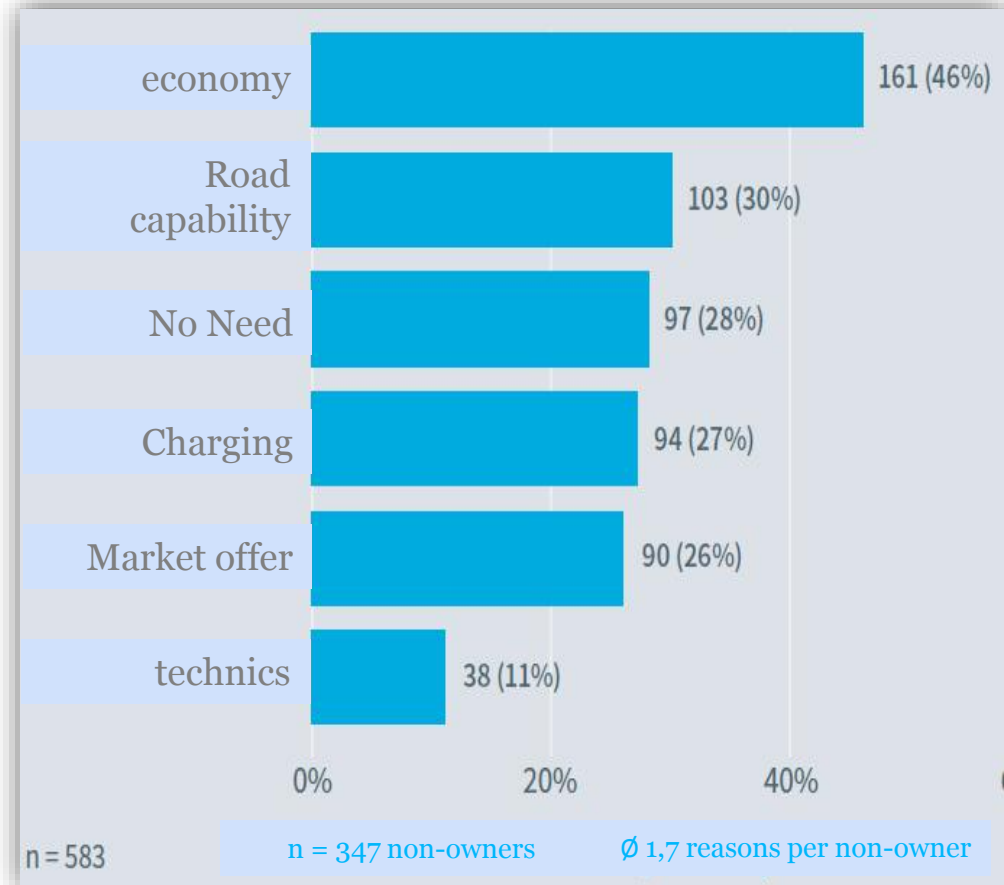


Was waren Ihre Beweggründe, sich ein Elektroauto anzuschaffen?





- (insufficient) economy is the main impediment (46%)
- Doubt at the road capability of electric cars are existing (30%)
- No Need of owning a car at all (28%)
- Problems with charging the car expected (27%)
- No suitable electric cars on the market available (26%)
- Electric cars were expected very reliable except for the battery





4. Conclusions





- Awake **curiosity** – sustainable inspired
- **Higher range** enables access to new customer segments
- **Battery costs** as key for better economy of electric cars
- Economy by **cost transparency**
- **Reliable charging solutions** giving confidence
- Extend **market offer** in all relevant car segments

Thank you for your attention!

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