DAT REPORT 2019

SHORT VERSION SHORT VERSION

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Key points of the DAT Report 2019

Ostfildern, Berlin (17 January 2019) – Deutsche Automobil Treuhand GmbH (DAT) will present the results of the current DAT Report 2019 on 17 January 2019, earlier than ever in the 45-year history of the DAT Report. The study is based on a representative survey of almost 4,000 consumers and considers car purchases (new and used cars) and workshop behaviour in Germany. For the first time, it will include a special chapter examining the private sale of own cars as well as a detailed discussion on the state of affairs of electromobility and the associated questions on the availability of charging facilities or the installation of an own charging station. The chapter on repairs has been extended to include numerous special topics relating to oil changes and car accident repairs.

Below is a selection of the findings.

1 General automotive topics

A2 Attitudes to the car 2018

Figures in percent

	New-car buyers	Used-car buyers	Car owners
Driving is fun	93	91	83
Without a car I would feel restricted in my mobility	94	93	89
Small rust spots and scratches are removed immediately	88	70	46
My car must always be in a technically fl awless condition	96	91	88
Regular servicing and care increase the resale value of my car	95	89	83

Source: DAT

There is no forgoing the car

More than 90 per cent of all car buyers (94 per cent of new-car and 93 per cent of used-car buyers) feel that their mobility is restricted without a car. Similarly, car owners confirm that they enjoy driving and that their own car must always be in perfect working condition. Further information is available on page 8 (figure A2) of the DAT Report 2019.

A2

Interest in car subscription

Eleven per cent of used-car and 20 per cent of new-car buyers could envisage using a car subscription service; that is, a mobility solution without a deposit or final payment, but at a fixed monthly rate (usually excluding fuel costs). Seventy-five per cent of used-car and 68 per cent of new-car buyers dismiss such a solution, while the remaining 14 and 12 per cent respectively are undecided. Further information is available on page 9 (figure A4) of the DAT Report 2019.

Women are more likely to make the car-purchase decision alone than men

When asked about the decision-making process (alone or together with others) when buying a car, it turns out that when either buying a new or used car, more women decide on their own than men. For new cars it is 49 per cent of women and 44 per cent of men who decide alone. For used car it is 53 per cent of women and 49 per cent of men. Higher investments are more likely to be decided together. Further information is available on page 10 (figure A5) of the DAT Report 2019.

2 Topics related to the car purchase and selling an own car

The importance of the car dealer as a source of information has increased

On average, 26 days elapse between beginning to research and actually purchasing a used car, and 33 days in the case of a new car. The car buyer conducts intensive research, both online and offline, throughout this period. It is noteworthy that: the importance of the car dealer as a source of information has increased and, in the case of new-car buyers in particular, has regained the top position in the list of offline sources; and in the wake of the numerous diesel initiatives and associated benefits, contact with local dealers has flourished. Further information is available on pages 16 and 38 (figures P3 and P36 respectively) of the DAT Report 2019.

P36

Readiness to invest a large amount in a car

In 2018, an average amount of €11,780 was invested in buying a used car and €31,130 in buying a new car. Prices vary significantly by brand or buyer group (first-time buyers paid significantly less than those who replaced their car with the purchase). Buyers paid €7,730 for a used car from a private owner, €7,890 from a non-franchised dealer and €15,610 from a franchised dealer. Further information is available on pages 31ff. and 42f. (figures P25 and P42 respectively) of the DAT Report 2019.

P25

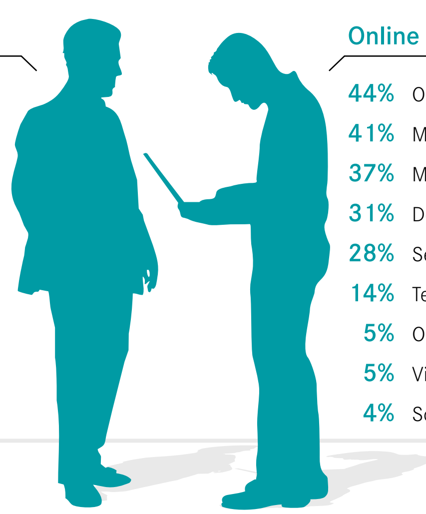
Private owners selling their own cars are viewed critically

Irrespective of the price obtained, a quarter of the respondents rate sales by private owners 'rather negative to very negative'. In comparison, trade-ins that are viewed critically are merely in the single digits; quite the contrary, 40 per cent of the respondents viewed the trade-in process very positively. Only a quarter of the respondents rated sales to private individuals similarly. Further information is available on page 20f. (figure P10) of the DAT Report 2019.

P36 **Information sources for new-car buyers 2018**

Offline

- 60% Dealer/garage (buyer is customer)
- 58% Talking with colleagues/friends/relatives
- 50% Test drive
- 43% Manufacturer brochure
- 30% Visit different dealers
- 17% Test reports in print media
- 10% Ads in print media
- 4% TV commercials
- 4% Test reports on TV

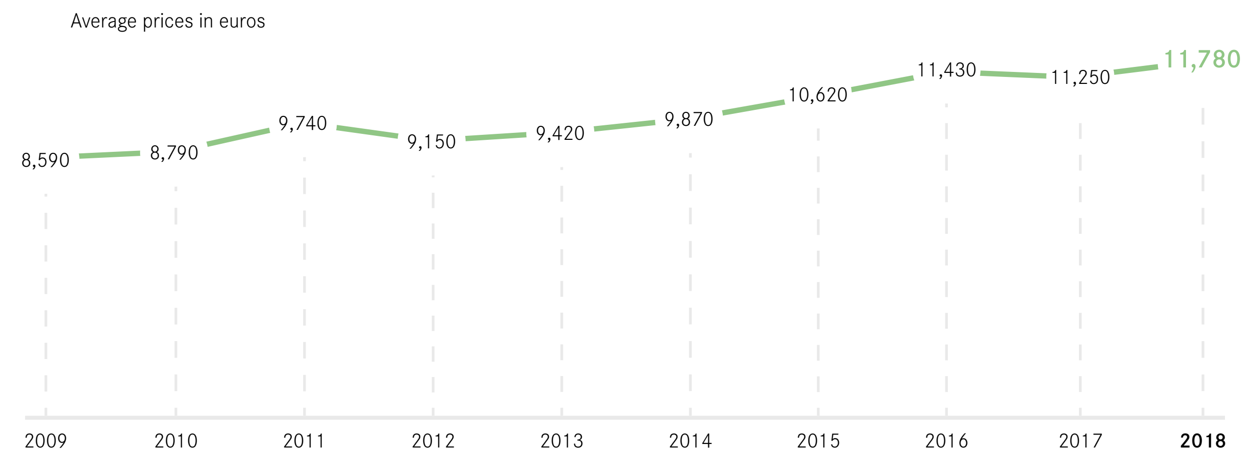


Online

- 44% Online car-selling portals/new-car portals
- 41% Manufacturer website
- 37% Manufacturer's car configurator
- 31% Dealer website
- 28% Search engines (Google, ...)
- 14% Test reports
- 5% Online ads/advertising
- 5% Videos on internet (YouTube, ...)
- 4% Social networks/forums/blogs

Source: DAT

P25 Used-car prices

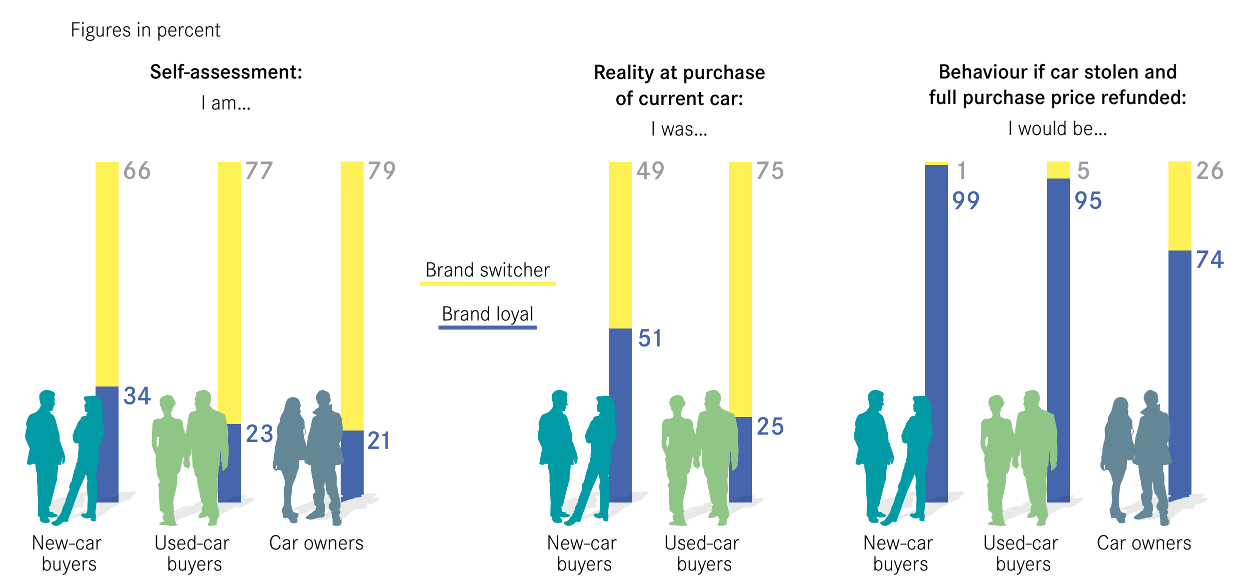


Source: DAT

Car brand loyalty remains high

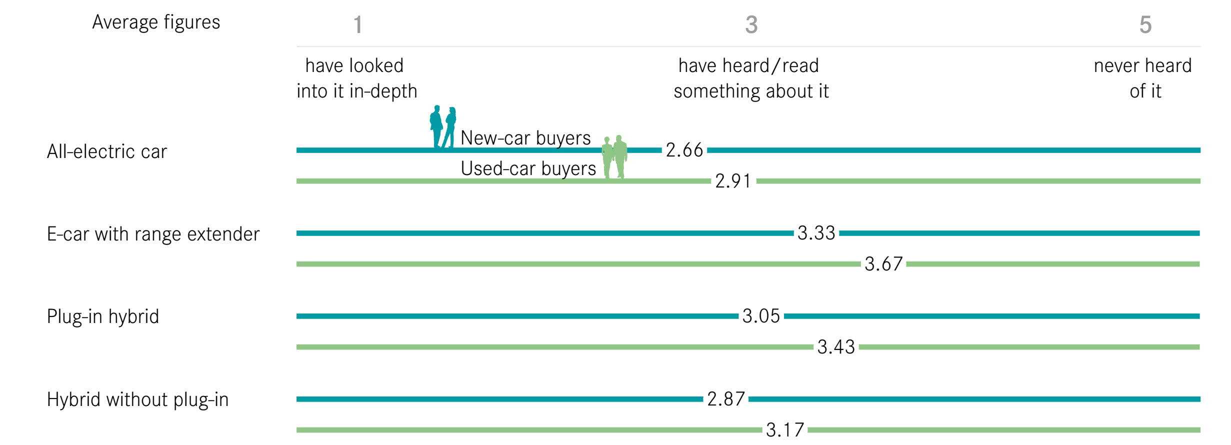
Fifty-one per cent of all new-car and 25 per cent of all used-car buyers decided to buy a brand of car they had previously driven, even though they considered themselves to be less loyal to their brand (34 per cent of new-car and 23 per cent of used-car buyers). Only 16 per cent of new-car and 30 per cent of used-car buyers considered the brand to be completely irrelevant. The rest stated that they switch between two or three brands at most. If the current car were stolen and the full purchase price reimbursed, 74 per cent would still remain loyal to their brand after owning the car for about 4.5 years. Further information is available on page 11 (figure A7) of the DAT Report 2019. A7

A7 Car owners and car buyers and their relationship to the car brand 2018



Source: DAT

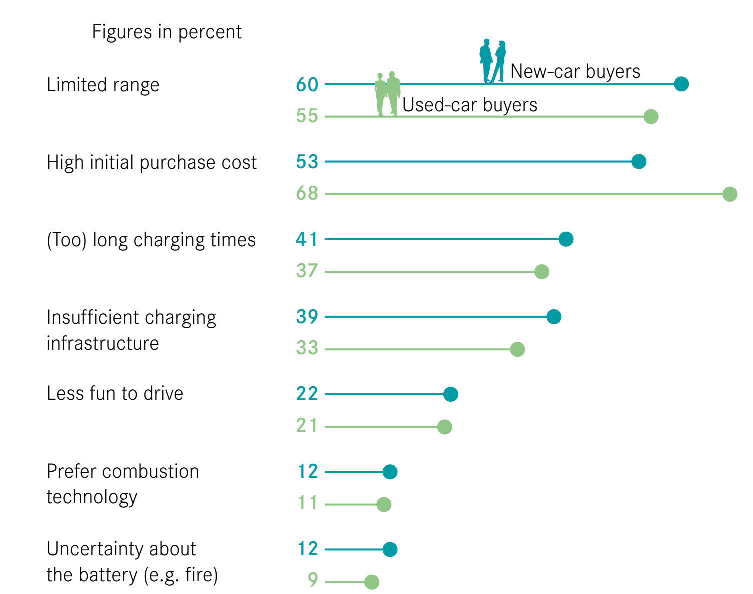
EA2 Knowledge about electric alternative drive systems 2018



Source: DAT

3 Topics related to alternative drive systems and electromobility

EA4 E-cars: Top reasons not to buy 2018



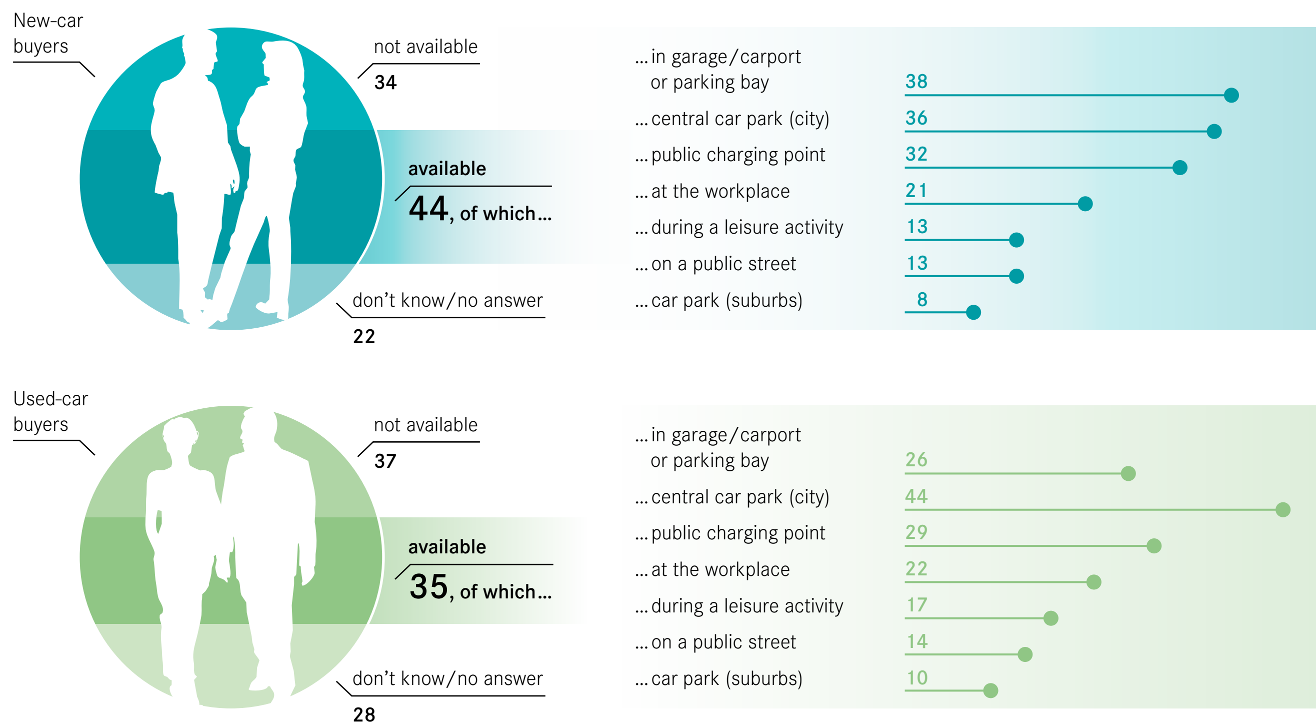
Source: DAT

Considerable knowledge of electrified alternative drive systems

Car buyers were asked to rate their knowledge of pure electric vehicles (EVs), extended range EVs, plug-in hybrids and non-plug-in hybrids on a scale from 1 (very knowledgeable) to 5 (never heard of it). New-car buyers were generally more open-minded and knowledgeable about the technology than used-car buyers. Knowledge of pure EVs was the most marked, with an average score of 2.66 for new-car and 2.91 for used-car buyers. Further information is available on page 49 (figure EA2) of the DAT Report 2019. EA2

EA5 E-cars: Availability of charging infrastructure 2018

Figures in percent; availability: multiple answers possible



Source: DAT

Limited range and high acquisition costs are obstacles to purchasing EVs

Sixty per cent of new-car buyers cited limited range as the reason for their decision against an EV. In the previous year, it still came in second at 51 per cent, ahead of the acquisition costs. Used-car buyers cited the latter as the major reason and, at 55 per cent, were somewhat less concerned about the range than new-car buyers. Overall, only 12 per cent of used-car and 24 per cent of new-car buyers had considered a car with an alternative drive system. EA4 Further information is available on page 49f. (figures EA3 and EA4) of the DAT Report 2019.

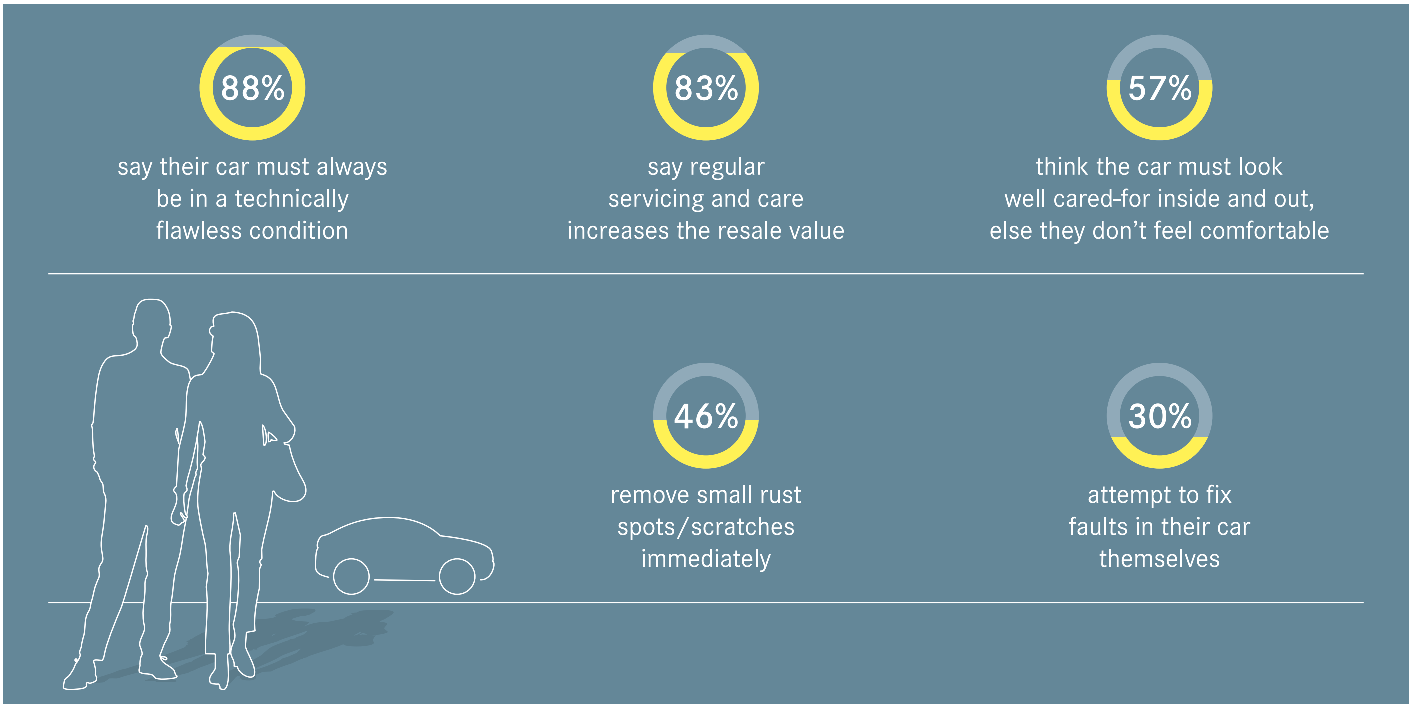
More than a third of car buyers have no charging facility

When asked about charging facilities for EVs, 37 per cent of used-car and 34 per cent of new-car buyers replied that they have no nearby charging facility. More than 20 per cent either stated that they do not know or provided no information. Thirty-five per cent of used-car and 44 per cent of new-car buyers confirmed that they have a charging facility (such as at a centrally located car park or a public charging station). Further information is available on page 50 (figure EA5) of the DAT Report 2019. EA5

Car buyers prefer hybrids to EVs

When asked about the type of drive system they would prefer in the absence of pure combustion engines, 67 per cent of new-car and 64 per cent of used-car buyers would opt for a hybrid vehicle. Only 33 per cent of new-car and 36 per cent of used-car buyers would opt for an EV. Further information is available on page 51 of the DAT Report 2019.

W37 **Statements on value retention and care 2018**



Source: DAT

4 Topics related to workshops

An own car – still the Germans' favourite

Eighty-eight per cent of all car owners think it is important that their car is always in perfect working condition. Eighty-three per cent are of the opinion that regular care and maintenance checks increase the resale value. Almost every fourth person (24 per cent) has developed a fondness for their car and considers repairs, even if they don't make economic sense. Fifty-seven per cent believe that a car must look well-cared-for both inside and out, otherwise they would feel uncomfortable. Thirty-six per cent wash or have the car washed once a month. Further information is available on page 71f. (figure W37) of the DAT Report 2019.

W37

A third think that online customer workshop reviews are important

Thirty-one per cent of car owners stated that good customer reviews are important to them when choosing a workshop. The younger the respondents, the more important this is to them. One must stress the overall high loyalty of German car owners to their preferred workshop: 80 per cent always have their repairs carried out in the same workshop, while only 17 per cent feel that they frequently do not get the best advice at their workshop. Further information is available on page 72f. (figures W39 and W40) of the DAT Report 2019.

W39

Almost half would dare to document car accident damage using a smartphone

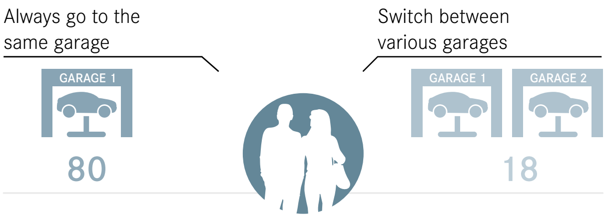
After an accident, 45 per cent of car owners would dare to compile effective (photographic) documentation of the damage to their car, similar to that produced by a surveyor, using a smartphone, and subsequently send it to their car insurance company. The insurance company would then determine the extent of the damage from this information. Thirty per cent stated they would not dare do this. Further information is available on page 70 (figure W35) of the DAT Report 2019.

W35

W39

Garage loyalty: Choice of provider for service and repair work 2018

Figures in percent



Always go to the same garage		Switch between various garages
81	German premium brands	16
79	German brands	19
82	Import brands	17
81	Small town (<20,000 POP)	18
76	Large city (>500,000 POP)	22

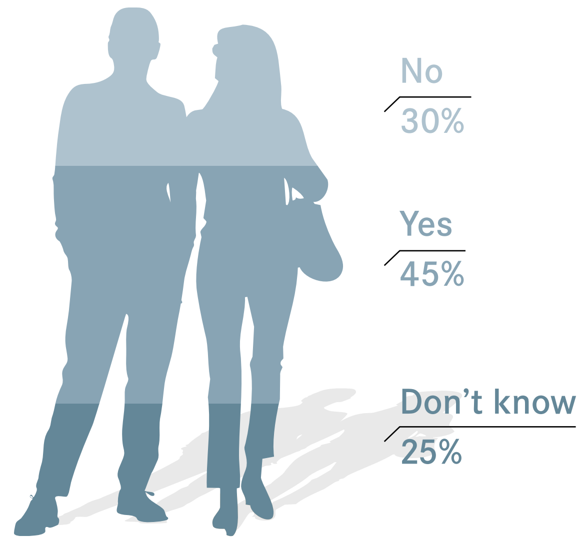
Difference to 100% = no answer

Source: DAT

W35

Documenting of damage by app to insurer 2018

Would be capable of doing this:



Source: DAT

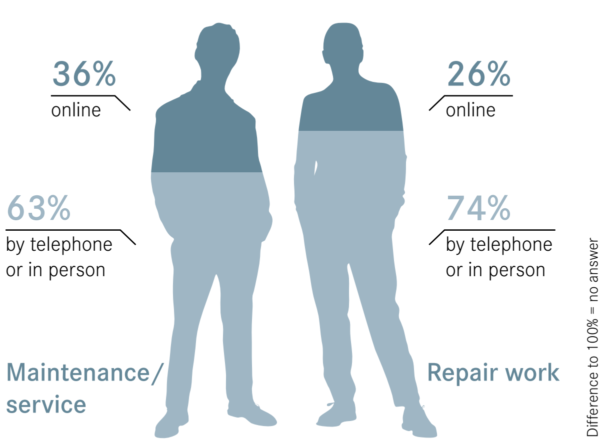
Readiness to book repairs and maintenance checks online remains unchanged

Thirty-six per cent of car owners would irrevocably book a maintenance check online. This is one percentage point more than in the previous year. Twenty-six per cent (one percentage point less than in the previous year) would do this for pending repairs. Overall, only 15 per cent of car owners made an online search for information prior to visiting a workshop. This figure rose to about 80 per cent for a car purchase. Further information is available on page 76 (figure W45) of the DAT Report 2019. W45

W45

Willingness to make bookings 2018

Basis: Car owners with online access



Source: DAT

In addition to the facts mentioned above, the DAT Report addresses many other topics, including satisfaction with the workshop and car seller, and reasons for choosing a car dealer. Data on repaired and non-repaired car accident damage was also collected. The emotions involved in buying a car, the role of warranty and finance providers as well as the effects of the Internet on buying a car were also researched. Visit report.dat.de to find out how to acquire the report.

About the DAT Report

The DAT Report is an annual publication of Deutsche Automobil Treuhand GmbH (DAT) and has been published for 45 years. It has been the reliable and impartial source of information on the purchase of used and new cars and workshops since the 70s. The DAT Report is considered a standard reference of the automotive industry that annually provides accurate information on automotive issues in Germany in a unique manner. Since the inception of the DAT Report, the market behaviour of German drivers has become transparent and perceptible. Hence, this comprehensive study has been established as an important tool for strategic planning in the automotive industry for more than four decades. The DAT Report is consistently based on a representative consumer survey conducted by an impartial market research institute on behalf of DAT.

The current DAT Report 2019, which comprises 84 pages and 131 figures, will be presented to around 250 political and business guests in Berlin on 17 January 2019, marking the start of the new automotive year. The new DAT Report 2019 will be available to the public as from 26 February, subject to a fee. All information on how to acquire the report is available at report.dat.de.

The market research institute GfK surveyed the car purchases and workshop behaviour of a total of 3,943 private individuals for the DAT Report 2019. Face-to-face interviews on car purchases were held with 2,628 people–the only condition was that the car purchase was to have occurred between March and June 2018. The interviews were held between July and October 2018. Questionnaires on repairs and services were sent by post to 1,315 drivers and car owners. Responses were returned in October and November 2018.

Report figures, among other things, will be regularly posted on Twitter (twitter.com/datgroup) with the #datreport hashtag.
Specific figures and additional information are available at report.dat.de.
Additionally, the DAT Diesel Barometer® at dieselbarometer.dat.de and the free SilverDAT newsletter, which includes additional information from the DAT Report or special topics and flashbacks to earlier years or decades, are published once a month. You may register at www.dat.de/newsletter.

About DAT

Deutsche Automobil Treuhand GmbH (DAT) is an internationally active company in the automotive industry that collects, augments, compiles, processes and structures comprehensive vehicle data, and subsequently makes it widely available to the industry across a large variety of media and software solutions.
DAT considers itself an impartial intermediary between the various interest groups in the automotive industry and has enjoyed the support of its partners VDA, VDIK and ZDK for almost 90 years. An advisory board formed by various consumer associations under the leadership of the ADAC monitors the activities and, in particular, the continued unrestricted impartiality of DAT for the benefit of private and commercial consumers alike.

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