



DAT REPORT 2025

ENGLISH VERSION

Automotive excellence
starts with us.



Dear Reader,

In recent years, we have both frequently emphasised in our presentations and talks that the current DAT Report is the most exciting ever.

After all, the developments were often surprising, and some findings were revolutionary. The changes in the automotive industry from 2009 to 2019 brought growth, new technologies, the launch of electric mobility as another drive type, and consolidated the role of the car as a basic means of transport. The Covid years reinforced this, and the phase of multiple shortages introduced new aspects to our study.

And 2024? This DAT Report, too, is exciting and, what's more, also the most challenging DAT Report either of us has ever produced.

Why is that? 2024 is the second year of recession, which has hit the automotive industry particularly hard; we have a location crisis in Germany; and factory closures and redundancies are looming. The self-proclaimed 'traffic light of progress' ran out of steam before the end of its legislative period. All of this is having an impact on consumer behaviour. Electric mobility is taking off, but more slowly than many politicians and manufacturers had imagined. There is uncertainty on the consumer side, a reluctance to buy, and good advice is more in demand than ever.

DAT was founded almost 100 years ago by the automobile associations as a neutral data authority, and with the DAT Report, a tool has now been available for the past 51 years that provides a very good understanding of the consumer's perspective. After all, almost 90% of all cars in this country are registered to this group of persons: they determine the market, they determine the speed with which changes take place.

We would very much like to see political and business objectives reconciled without losing sight of the consumer. And that requires insightful, representative information from which conclusions can be drawn, enabling us to rethink the way things are done. For example, are consumers actually being reached where they're at? And is the industry communicating appropriately to their needs?

Along with everyone else at DAT, we hope you find this an insightful read.



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Survey method/time frame

For the DAT Report 2025, a representative survey of 4,664 persons was conducted by market research institute GfK on car purchases and attitudes to garages. For the car purchases, 2,602 private individuals who had bought a car during the period March to October 2024 were surveyed.

These face-to-face (CAPI) interviews were conducted between July and October 2024.

For the repair and servicing section, 2,062 car drivers/owners were surveyed (questionnaire via access panel/CAWI) in October 2024. All samples are weighted and therefore representative of private car buyers and all car owners in Germany.

For a more readable style, we have avoided the use of the language forms 'male', 'female', 'other' at the same time. Unless explicitly stated in the text, any terms used to denote persons refer to all genders equally.

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Buying a car

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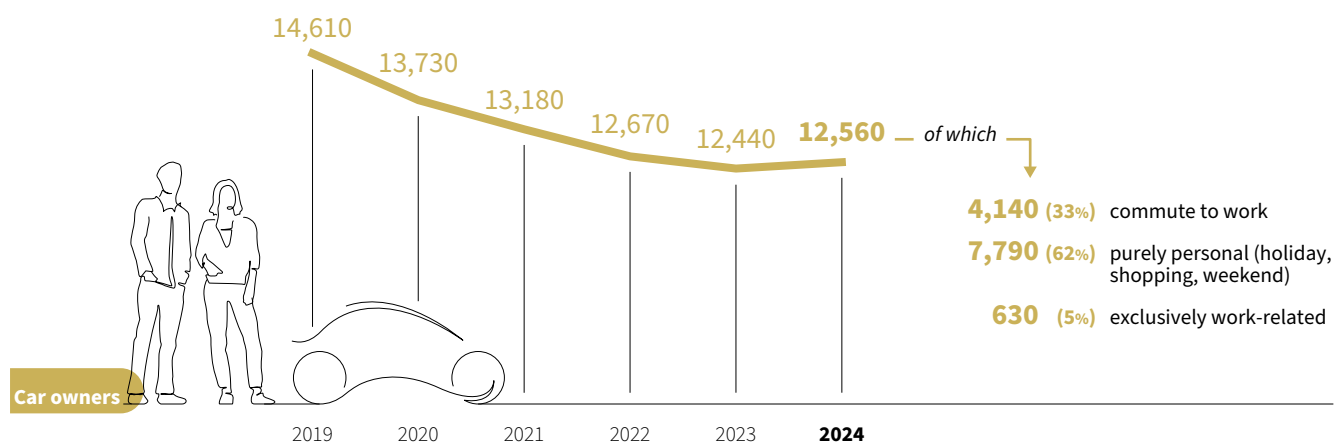


Status quo

**Attitudes to the car,
to buying and owning**

A1 Annual kilometres covered and purpose of car journeys of private car owners

In kilometres



Source: DAT

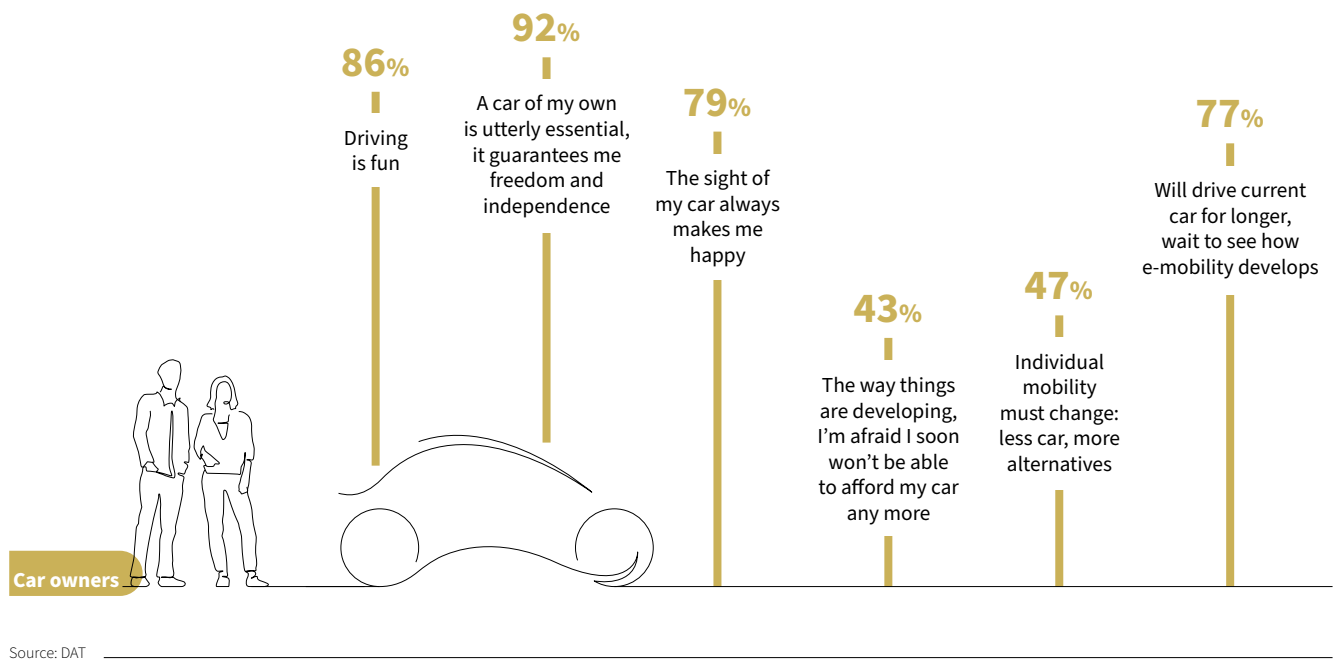
1.1 Usage habits and attitudes to the car

1 Getting safely from A to B

Whichever way you look at the automobile – whether emotionally or objectively – it always accompanies its owner safely and spontaneously from A to B. This apparent banality has been of crucial importance to people in Germany ever since the invention of the car. In this respect, the question as to how or why you're travelling from A to B is not of primary relevance, but also the question of how far A is from B. Extrapolated to the whole year, this gives the annual mileage of every car owner in Germany. According to information from the German Federal Motor Transport Authority (KBA), just under 90% of the 50 million cars in Germany are in the hands of private consumers – and that for a period of five to nine years. Figure A1 shows the distances these car owners travelled in their vehicle, and for what purposes. Since 2019, annual mileage has fallen continuously from 14,610 to 12,440 kilometres. This was an all-time low since this important figure was first calculated. The Covid pandemic, working from home, to some extent the Deutschlandticket public transport pass, high fuel prices, etc. are likely to have played a role

here. The trough now seems to have bottomed out, and mileage rose slightly again in 2024 (+1% to 12,560 km). When analysed by drive type, it can be seen that the diesel is still the drive of choice for high-mileage drivers at just over 15,500 km per year. However, this figure fell below the 16,000 mark for the first time (-3.4% compared to the previous year). Petrol engines gained slightly (+3.3% to 10,800 km), and there has also been a slight increase in the mileage of alternative drive systems (+2.5% to 14,760 km). The percentage distribution of journeys in the graph shows that a third of all kilometres travelled were for the home/work commute. Just under two-thirds were purely private journeys for shopping, holidays or weekend trips. According to the representative survey of private car owners, only 5% of these journeys were purely for work-related purposes. These percentages are identical to the previous year. What is noticeable is that car owners in small and large cities covered more kilometres than in the previous year – which may be a sign that more commuters are back on the road, as many companies have tightened their rules for working from home.

A2 The car owner and his relationship with the car 2024



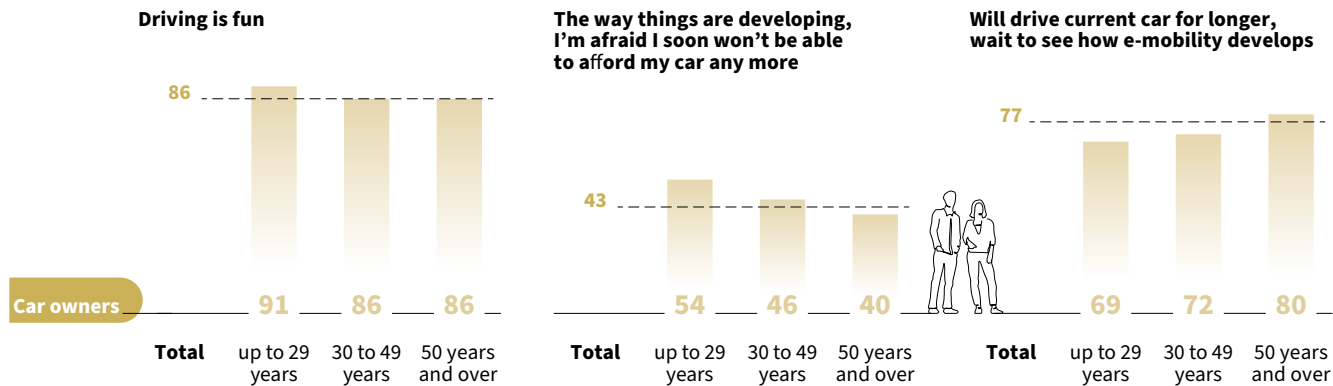
2 Emotional companion in everyday life

For the average car owner in Germany, who covers an average 12,560 kilometres a year in their own car, motor-ing is not just about objective factors such as distances travelled: the emotions play a major role too. In essence, this can be summed up in various statements, which are portrayed in Fig. A2. For example, 86% of car owners af-firmed that they find driving fun – this high fun factor has

been observed for many years despite the rising volume of traffic. The freedom and independence that owning a car guarantees every day and at all times is also elementary in the view of 92% of car owners. In addition, 80% say the sight of their car never fails to give them a happy feeling. These three aspects have each risen slightly compared to the previous year, with the most significant increase of six percentage points being the joy that is felt at seeing

A3 Selected attitudes towards the car by age group 2024

Figures in percent



one's car. The perspective on alternatives to owning a car is similar to the previous year, i.e. the group of people who are more critical of individual transport and call for the use of alternatives such as public transport, e-scooters, e-bikes, car sharing, etc. has neither expanded nor shrunk at 47%. The proportion of car owners who fear that they will soon no longer be able to afford their car has fallen slightly. A year previously, their number was at 46%, but is now a little lower at 43%. Nevertheless, this aspect as well as the above-mentioned attitude to individual mobility are relevant factors. The group of car owners who say they will drive their current car for longer in order to wait for the technological or political development of electric mobility or drive types, is still extremely high at 77% (2023: 80%).

Significant differences by age group

A3

Looking at selected statements by age group, as shown in Fig. A3, a simple conclusion can be drawn right away: younger car owners not only enjoy driving the most, they are also the most open to new technologies such as electric mobility. However, they are the weakest financially when it comes to the current personal economic circumstances. They have significantly fewer financial reserves and so are most anxious about not being able to afford their own car any more. Going into greater depth, the chart makes it very clear: the fun factor of the average car owner is very high already, but it is easily surpassed by the younger owners at 91%. However, they stand out even more when it comes to the fear of soon no longer being able to afford their car: 54% of owners up to 29 years old compared with 40% of the 50+ generation is a clear statement.

Young car owners are also less likely to want to wait for developments, or they believe that now is the time to embrace a new drive technology such as electric mobility. This mixture of curiosity and open-mindedness leads to the differences

compared to car owners aged between 30 and 49 or the 50+ generation. Of the latter, 80% will continue to keep their existing vehicle and wait and see how things develop; they have their long-term experience with combustion technology and don't currently see the need to switch. Among young people, only 69% agreed with this statement. Industry and retail should therefore take a two-pronged approach in their communication, by addressing young people specifically to promote the topic of electric mobility and make it future-proof. But the older people are the ones who currently need to be won over through communication. After all, they are in a better financial position to afford the switch to electric mobility: they simply don't want to take the step at the moment.

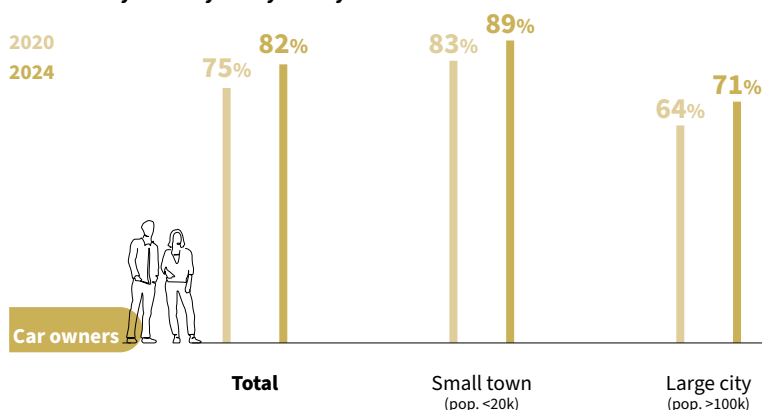
Mobility almost impossible without a car

The question of the extent to which everyday mobility needs can be managed without a car hardly arises for 82% of all car owners, as Fig. A4 shows. For them, owning a car is essential to ensuring their mobility in everyday life. Without a car of their own, they cannot manage their day-to-day mobility needs. This is a significant increase of +7 percentage points compared to 2020. And the need has risen significantly not only in small towns (+6 percentage points to 89%), but also among car owners in large cities (+7 percentage points to 71%), although the vast majority of city dwellers describe their public transport system as 'good' or 'very good'.

A4

A4 Having your own car is a must

Having a car is indispensable to me to ensure my mobility in day-to-day life



Source: DAT

1.2 Buying a car

1 Planned car purchase with obstacles

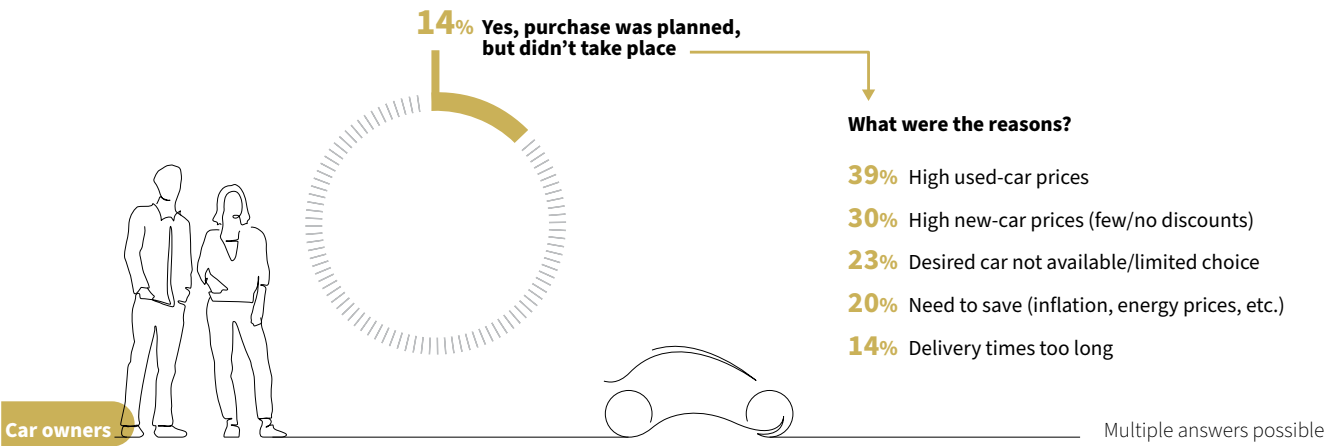
For many people who rely on their car on a daily basis, at some point the question will arise of whether to buy a new vehicle or spend money on making urgent repairs to the existing one. In the past few years of multiple shortages and an economic situation that is still uncertain today, many car owners put off buying a new car as long as possible. While the economic circumstances remain strained for many people, the supply situation on the new- and used-car market has at least changed to the effect that more goods are available again – albeit at only slightly lower prices. As a result, many car owners have once again put their purchase plans on hold. How this looked in detail for 2024 is shown in Fig. A5. The basis was the following question: “Thinking about your household, had you planned or attempted to buy a car this year, but it didn’t work out?” It found that 14% of car owners, and thus even slightly more than in the previous year (2023: 11%), did not carry through with a firmly planned car purchase. This is still a high figure and one that is significant

for the entire automotive industry in particular. For while the used-car market grew slightly over the previous year, the lack of incoming orders for new cars was felt above all by car manufacturers and their suppliers.

High prices pump the brakes on car purchases

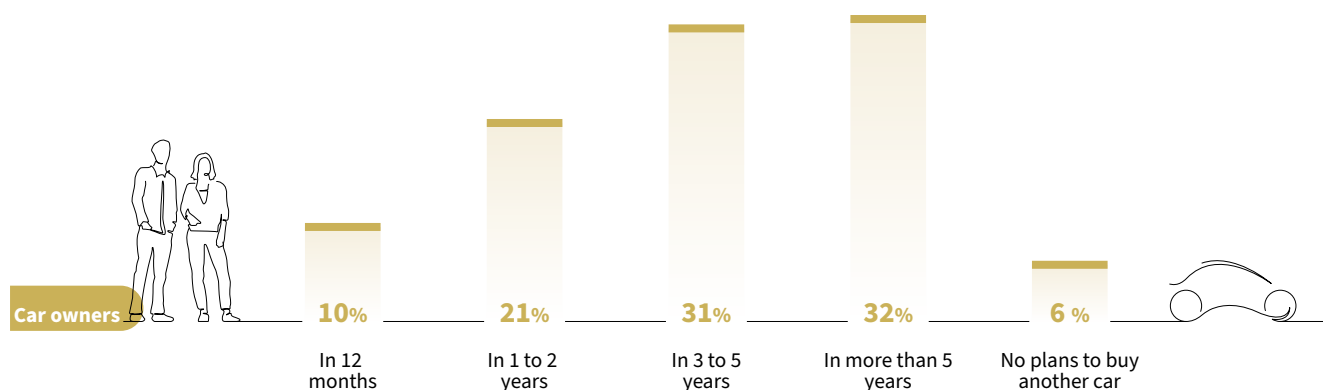
But what specific reasons did people give for not seeing through their car purchase? The first two places in the diagram were taken by high car prices. They put the brakes on the car-buying plans of used-car and new-car buyers alike. The statement “Desired car not available on the market” followed in third place at 23%. The statement next down, “We have to make savings because of generally high prices or inflation”, showed a decrease of ten percentage points compared to the previous year, at 20%. As in the previous year, the long delivery times (an obstacle for as many as 27% in 2022) were much less of an issue at 14%. Thus for many, 2024 was a year in which, despite definite plans, they did not part with their existing car, but continued to invest in maintenance and repairs.

A5 Car purchase 2024: planned, but didn’t take place



Source: DAT

A6 Prognosis of car owners 2024: timing of next car purchase



Source: DAT

2 Forecasts for the next car purchase

If all car owners are asked when they will buy their next car, it becomes clear that the car market is likely to develop fairly tentatively over the next year or two. As depicted in Fig. A6, just 10% of all car owners in the representative survey plan to make a purchase within the next twelve months. 21%, or one in five, plan to do so in the next one to two years. Adding these two groups together, less than one-third (31%) of all private car owners are entertaining plans to buy a car within the next 24 months. An identical 31% of all car owners foresee a purchase in three to five

years, and a similar number (32%) in more than five years. Six percent stated that they are no longer planning to buy a car at all.

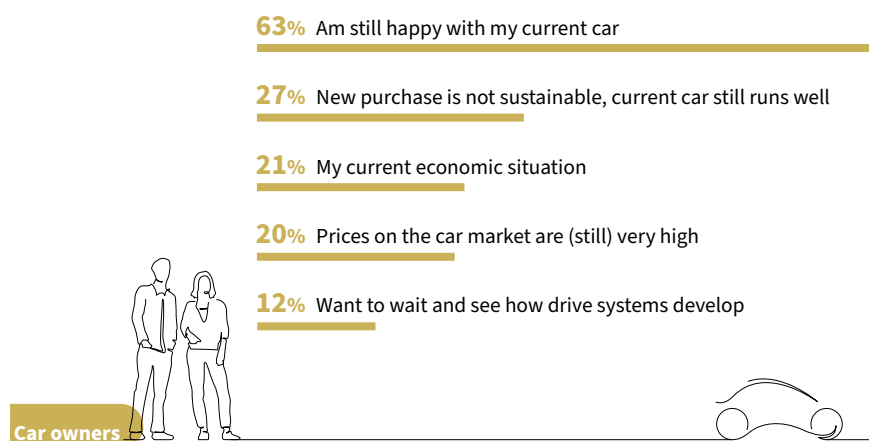
High level of satisfaction with the current car

But what reasons motivated owners to delay their planned car purchase? The ranking of reasons shown in Fig. A7 refers to those who are planning to make a purchase in one to two years at the earliest. What is interesting about their answers is that the vast majority are simply still satisfied with their current car (63%). Despite

the higher average car age, this figure has risen slightly compared to the previous year (2023: 61%). In a distant second place (at 27%) was a statement that is not based on monetary reasons either, but says that it is not a sustainable choice to buy a new car when the existing one is still in good working order. This was followed by two monetary reasons for not buying a car in 2024: their personal financial situation (21%) and what they see as the “still very high prices” (20%). Waiting for further developments in the drive systems was ranked fifth by car owners at 12%.

A7 Reasons for not buying a car soon 2024

Basis: Car purchase planned, but in 1–2 years at the earliest; multiple answers possible



Source: DAT

3 Attitude towards new cars

For many years now, private car buyers' new cars have only accounted for one-third of all first-time registrations. With the increase in new list prices over the years and decades, but also the rise in actual purchase prices, it is permitted to question whether private car buyers in general still have their sights set on a new car. So for the DAT Report 2025, private car owners were surveyed representatively for the first time about their fundamental assessment of the topic of buying new cars or factory-new vehicles. The results are summarised in Fig. A8. It shows that just over half of all respondents (56%) would consider buying or leasing a factory-new car. Since there are no comparisons from the past, this means that as things currently stand, the other just under half of all car owners in Germany are no longer considering buying a new vehicle.

Alarming signal for the entire industry

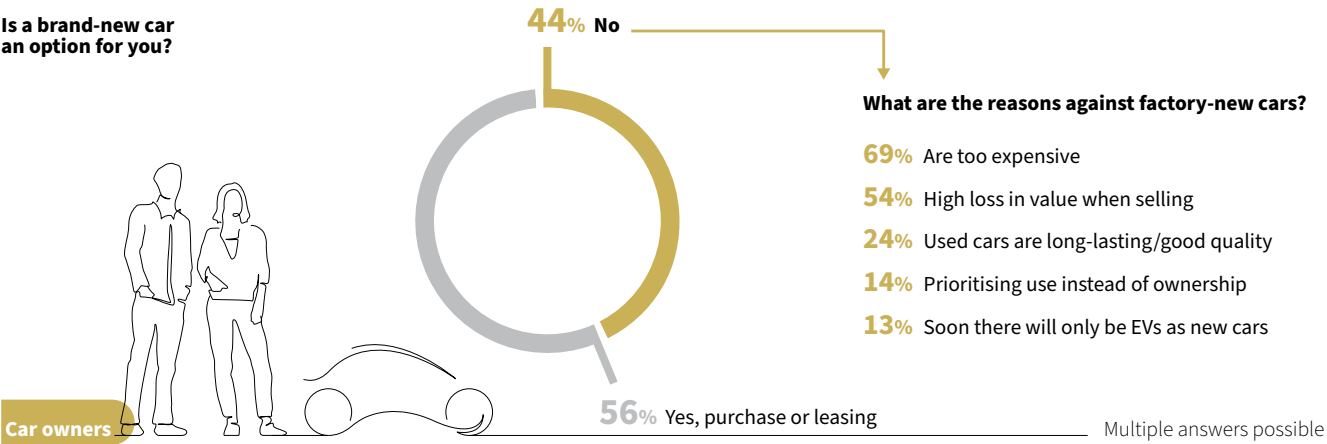
The fact that for 44% it is out of the question to buy a brand-new vehicle can be seen as an alarming signal for the entire industry. Of course, commercial registrations of new cars are as before an important pillar for car manufacturers, and company cars in particular play an important role among all commercial registrations. But

why such a large group of private car buyers are not (or no longer) willing to buy a new car was analysed further for the DAT Report. The wording of the question was: "In your opinion, why does it (perhaps) no longer make sense to buy a brand-new car?" The results are also depicted in the chart. It shows that the vast majority (69%; multiple answers were possible) affirmed that they consider new cars too expensive. Moreover, 54% were worried about the steep loss in value when it eventually came to selling the car they had bought new. This view is relativised to a certain extent if you consider the ownership period of the vehicles and are aware that the resale plays only a very minor role at the time of purchase (see p. 51).

Used cars as a rewarding alternative

For almost one in four car owners (24%), a new car was out of the question because, they stated, a used car represents a high-quality alternative. This was followed at a considerable distance by two other aspects, which focus on benefit rather than ownership (14%) and also reveal a clear stance against electric mobility (13%). New cars are no longer of interest to this latter group of people because they will (probably) only be available with an electric drive in the future.

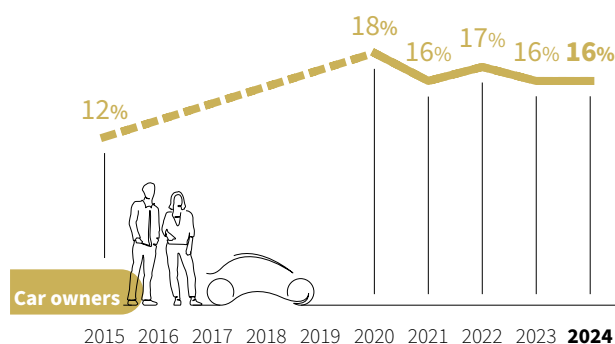
A8 Assessment 2024: buying a new car in the future



Source: DAT

A9 Car-sharing as an alternative to owning a car

2016 to 2019: not surveyed



Source: DAT

4 Alternatives to owning a car

Ignoring the use of public transport, e-bikes/cargo bikes or walking for a moment, car-sharing and car subscriptions offer people in Germany two alternatives to owning their own car.

Every year, the German Car-Sharing Association determines the supply of Car-Sharing vehicles in cities and municipalities. According to a recent report, it has been possible to improve the supply of cars in the major cities by an average of 29% in the last two years. However, as the figures from the DAT Report of recent years show, car-sharing is only considered as an option by car owners to a very limited extent. As in the previous year, it is still true for 2024 that only 16% would actually give serious consideration to car-sharing as an alternative to a car of their own. In the first survey on this topic in 2015, the figure was just 12%. It peaked at 18% in 2020 and is now stagnating at 16%, as Fig. A9 shows.

A9

Younger car owners are more open-minded

It is without question true to say that the sub-group of car owners up to the age of 29 is much more open to this topic. The level of approval in 2024 was 29% in this group. The other two age brackets (30 to 49 years: 19%; 50+ years: 13%) do not see sharing a car with others as an alternative to owning a car. Breaking these numbers down by the size of the home town: small towns also have little interest, with only 13% in favour, while 15% of car owners in medium-sized towns approve of the idea. These two settings account for the vast majority of the population. As for car owners in large cities, 22% could definitely imagine

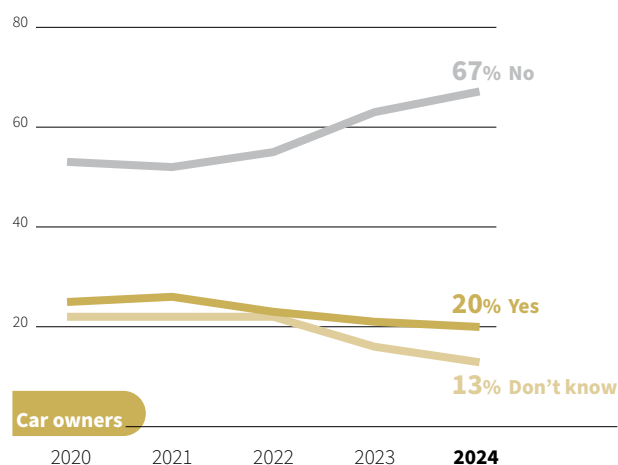
car-sharing as an alternative to owning a car. In 2020, at the peak of its popularity, the percentage of car-sharing advocates in large cities stood at 26%.

Clear trend towards a 'no' for car subscriptions

Since their launch, car subscriptions have been a kind of competitor to long-term hire, as they too offered a temporary mobility solution instead of long-term ownership. The activities of many manufacturers, but also cross-brand suppliers, have remained fairly tentative in recent years, presumably because they had hoped for more opportunities on the private market in addition to the commercial subscribers, but these have not materialised. This is also shown by the results over time: since 2020, as can be seen in Fig. A10, the rejection rate has risen from 53% to 67%, while approval has fallen from 25% to 20% over the same period. This suggests that the market has done its research and sorted itself out. Someone who already owns a car is increasingly less likely to imagine taking out a subscription as an alternative to ownership. This doesn't mean that there is no potential, as a subscription allows consumers to familiarise themselves with new manufacturers without having to make a concrete commitment. In essence, as can be seen from the figures of recent years, this seems to be an option that is more relevant to commercial users.

A10

A10 Willingness to drive a car on subscription



Source: DAT

5 Necessity of car purchase

All those who didn't postpone their car purchase in 2024, but actually saw it through, were asked the following question for the DAT Report 2025: "Please recall the background to your purchase – would you describe the purchase of your current vehicle as absolutely necessary?" After all, car buyers also have alternatives such as car-sharing or car subscriptions (see p. 13) to choose from. However, the addition of the word "absolutely" was intended to remind respondents once again how relevant they considered their purchase decision to be in the car year 2024.

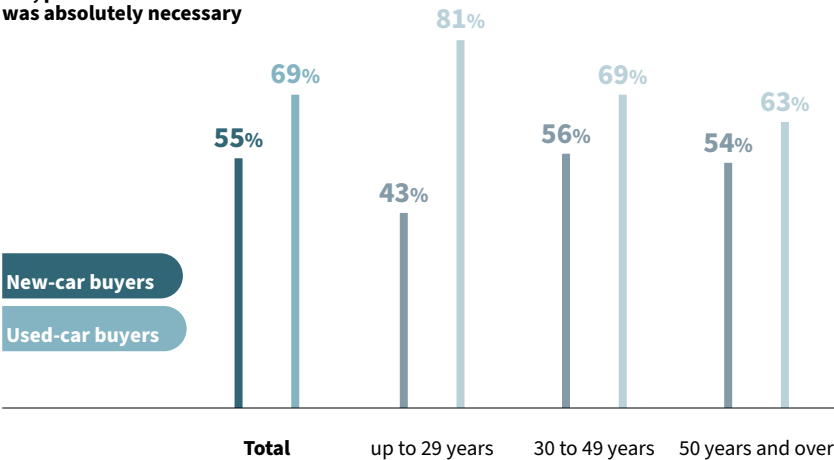
Used-car buyers more than new-car buyers

A11 Looking at the responses of car buyers, as shown in Fig. A11, it is immediately apparent that used-car buyers saw a much greater need to buy a car in 2024 than new-car buyers: 69% of all used-car buyers and 55% of all private new-car buyers affirmed this. Both figures show a slight increase of one percentage point on the previous year. After several years of a dearth of offers, of high prices on the car market and of waiting for prices to fall, many of the postponed purchases were apparently now realised in 2024. There are also several interesting aspects to the question of necessity: the breakdown by age group shows, for example, that the subgroup "up to 29 years" had the greatest need among used-car buyers at 81%. These are likely to include many first-time buyers, 92% of whom affirmed that the car purchase was necessary. For all these young people, buying a used car is obviously not a 'nice-to-have', but a 'must-have', as this age group's entry into working life is often associated with a change in mobility behaviour. In the buyer group aged between 30 and 49, the need was also very pronounced at 69%. The large age group of the 50+ generation saw the purchase as an absolute necessity in no less than 63% of cases. The change over the previous year (2023: 60%) was most pronounced there.

92%
of first-time used-car buyers
considered their car purchase
an absolute necessity

A11 Necessity of car purchase 2024

Yes, purchase of current car
was absolutely necessary



Focus on older new-car buyers

In the case of private new-car buyers, it can be seen that only just over half (55%) considered buying a car in 2024 to be absolutely necessary. As the need to buy a car among new-car buyers was significantly lower than among used-car buyers, this suggests that many purchases were also made for emotional reasons and not out of necessity. Due to the upcoming changes in the model policies of many manufacturers, a lot of new-car buyers may, for example, have considered

Source: DAT

purchasing a new vehicle before the end of a model cycle. As in the previous year, the need was lowest among young new-car buyers (43%) and highest among buyers aged between 30 and 49 (56%). The 50+ generation made a sharp jump compared to the previous year, with 54% stating that the car purchase was absolutely necessary, up from 48% a year earlier. Similar to with used-car buyers, a purchase backlog seems to have been cleared here. At the same time, the figures suggest that the remaining 46% had bought a new vehicle simply because they wanted to or could afford it.

Life changes were a decisive factor in new-car purchase

For the DAT Report 2025, all new-car and used-car buyers were asked about the main reasons for their car purchase. It is striking that changes in their professional and/or private situation are mentioned in first place by 24% of all new-car buyers in Fig. A12. This is an increase of four percentage points compared to the previous year and a rise from third to first place. 22% wanted a more reliable car, and for a similar number (21%) the leasing contract had expired. In a figurative sense, one could speak here of a 'normative force of the factual', which makes the next car purchase necessary more or less by contract. This was followed by two very different items at 17% each:

A12

A12 Main reasons for car purchase 2024

Multiple answers possible

24% New family/work situation

22% Wanted a more reliable car

21% Leasing contract expired

17% Bought on impulse/good offer

17% Wanted alternative drive

13% Had actually planned to buy in 2023

New-car buyers



33% Wanted a more reliable car

28% High repair costs/old car not economically viable

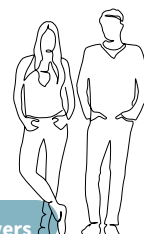
20% New family/work situation

20% Bought on impulse/good offer

11% High fuel consumption of old car

11% Had actually planned to buy in 2023

Used-car buyers





2

Drive systems

**Assessments, decisions
and scenarios**

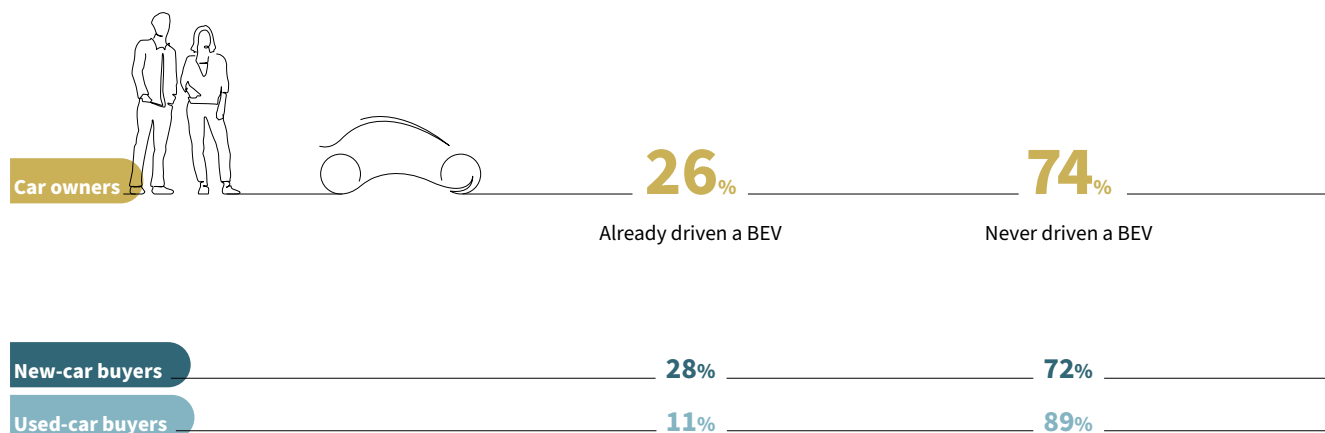
2.1 The current situation

Electric mobility in its current form is still a young drive technology which, strictly speaking, has only established itself in the past 10 years rapidly and in short development cycles alongside the combustion engine. Many new manufacturers are now offering the emission-free and silent drive form, but established companies have also electrified their model ranges. Electric mobility is also firmly anchored in the political agenda at European and German level and has been promoted through various measures. Prior to its collapse in late 2024, the German government published a paper in July entitled “Growth initiative – new economic momentum for Germany”. In it, they announced numerous activities to give new impetus to the ramp-up of electric mobility in 2024 after the end of the state EV subsidy in December 2023 (including a BEV special depreciation allowance until the end of 2028 or an increase in the cap for the gross list price from EUR 70,000 to EUR 95,000 for company EV taxation). However, the ramp-up stagnated noticeably in 2024. This was due to several factors, because

electric mobility is a drive technology that has to be experienced to be appreciated. That is the only way to break down prejudices and give people insights into its suitability for everyday use. That there is still room for improvement in this area becomes clear when all car owners, private new-car buyers and used-car buyers are asked whether they have already driven an electric car (BEV) themselves. The vast majority of all three subgroups – as shown in Figure E1 – have never driven a BEV themselves: 74% of car owners, 72% of new-car buyers and 89% of used-car buyers have no hands-on experience of an electric car. The more EV-experienced private individuals are most frequently found among new-car buyers (the smallest of all three groups) – here the proportion is 28%. Among car owners, the figure was 26%, while only 11% of used-car buyers have had their own EV experience to date.

E1

E1 Experiences with BEVs 2024



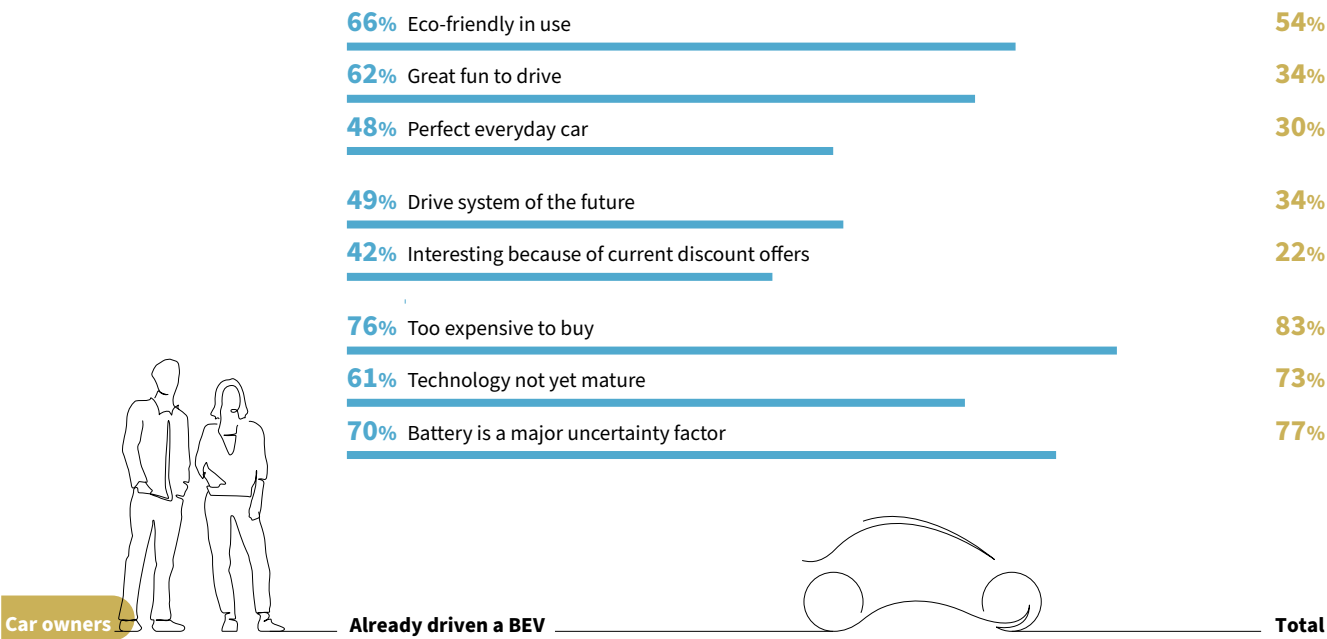
Source: DAT

2.2 Car owners' perspective

Almost 90% of the 50 million cars in the vehicle population are privately owned. This makes it highly relevant how these people view electric mobility. Without their trust in this drive technology, it will take a long time for EVs to become established. So we compared the average car owner with the BEV-experienced drivers, i.e. people who have already driven an electric car, in Fig. E2. Around two-thirds of people with BEV experience rated their use as eco-friendly and the driving pleasure they afford as high (in the "Total" group, only 54% and 34% respectively did so). The view that BEVs are perfect everyday cars was shared by almost half of those with BEV experience, compared with 30% of the population as a whole. This shows that if a person has experience of driving a BEV, they assess many aspects much more positively. The fact that this group of people has real-world e-experience and can then transfer

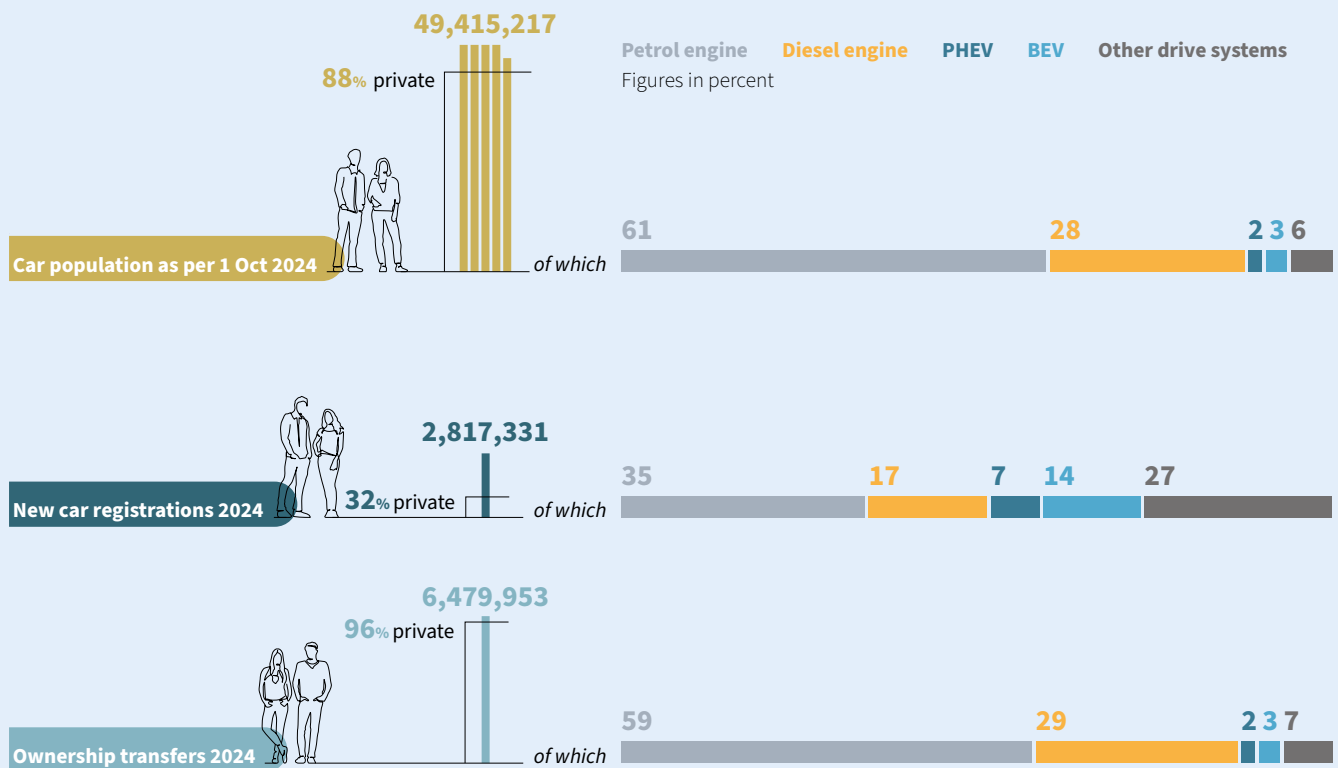
it into practice is also shown in the following items: just under half saw BEVs as the drive type of the future ("Total": 34%), and 42% found them interesting due to the current attractive offers from manufacturers, who were actively promoting them as a result of the sudden discontinuation of the e-bonus at the end of 2023 ("Total": 22%). However, despite the popularity of electric mobility, the attitude of the EV-experienced is not exclusively positive: in the survey, three-quarters were convinced that BEVs were too expensive to buy, 61% thought that the technology was not yet mature, and 70% considered the battery to be a major uncertainty factor. Even if these figures appear very high at first glance, they were significantly lower than in the population as a whole (purchase too expensive: 83%; technology not yet mature: 73%; battery major uncertainty factor: 77%).

E2 BEVs: assessments of car owners 2024



Source: DAT

E3 SPECIAL TOPIC KBA figures on drive types



Source: KBA

Makeup of the passenger car markets

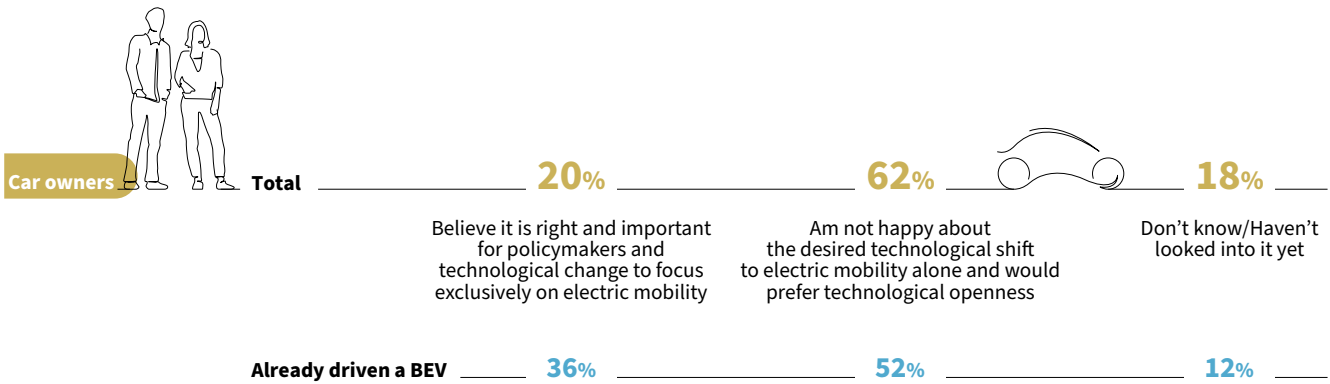
The Federal Motor Transport Authority (KBA) distinguishes between the passenger car population (all cars on German roads as at the reporting date), new registrations (cars registered for the first time) and transfers of ownership (new owners of previously registered cars). Figure E3 shows the relative sizes of each category, but also the differences broken down by drive type. In 2024, the 49.4 million or so cars in the car population was 'rejuvenated' by 2.8 million new registrations. In the same period, 6.5 million cars went to new owners. Besides these volume ratios, there are also significant differences in the types of drive: while the passenger car population is mainly dominated by combustion engines (petrol: 61%, diesel: 28%), 'real' electric cars accounted for just 5%. The latter comprise 3% BEV and 2% PHEV. It is a different picture for new registrations: although combustion engines are also in the majority here (35% petrol and 17% diesel), BEVs now account for 14% of registrations, with PHEVs contributing a further 7%. The ratio of combustion engine types among the transfers

of ownership are almost identical to those in the vehicle population as a whole (59% petrol, 29% diesel). Battery-electric cars, on the other hand, are underrepresented at just 3% BEV and 2% PHEV.

Focus on the private market

The makeup of the new-car market, with its high proportion of commercial registrations at 66%, is often wrongly thought to apply to the car population as a whole. In actual fact, just 12% of all cars in the vehicle population are actually registered to commercial owners. The majority (88%), and therefore almost every car on Germany's roads, belong to a private owner. This fact is a very important aspect in the context of the transition to electric mobility. Because converting such a large number of private owners to electric mobility takes time.

E4 Technological change: assessment of car owners in 2024



Source: DAT

1 Criticism of political plans

Numerous incentives have already been offered in the past to boost electric mobility in Germany, primarily in monetary form. The background to this is that new cars and light commercial vehicles are required to become emission-free by 2035 to meet the carbon reduction targets of European policy (e.g. Fit for 55). Without the availability of climate-neutral fuels ('e-fuels'), all manufacturers can do is to focus on full battery-electric vehicles. Car owners and car buyers in Germany were therefore confronted with the following question: "The automotive industry is in the throes of a technological shift, which is also being politically promoted and accelerated. What is your opinion on this topic?" The possible answers are depicted in Fig. E4. 20% of car owners believe it is "right and important for policymakers and technological change to focus exclusively on electric mobility." At the time of the survey, 62% were not happy about the desired technological shift to focus exclusively on electric mobility and would prefer technological openness. The remaining 18% did not know or had not yet looked into the issue. These responses are roughly on a par with the previous year, which indicates that such major changes take time. To quote Kurt Tucholsky: "The people get most things wrong, but they feel most things right." For the majority of car owners, electric mobility did not yet feel right in 2024; it had not yet become part of everyday life or their consciousness. There was significantly less scepticism, however, among car owners who have already driven a BEV. 36% of them considered the exclusive

focus on electric mobility to be correct and important. A good half (52%) rejected this idea, and the proportion of those who had not yet considered it or did not want to commit themselves was 12%.

Car service life: combustion engine vs. BEV

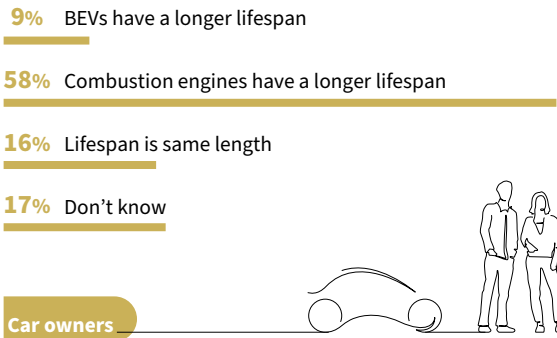
The combustion engine is a technology that was born at the end of the 19th century and so has shaped mobility worldwide for over 100 years. So it is not surprising, as is depicted in Fig. E5, that the majority of car owners believe that combustion engines have a longer service life than BEVs. In their eyes, the technology, which is still very young by comparison, obviously still has to prove itself. It would be relevant at this point to mention that at times in the

E4

E5

E5

BEVs: assessments of car owners 2024: BEV versus combustion engine lifespan



Source: DAT

early 20th century there were more cars with electric drives than with combustion engines, but this is irrelevant for car owners and their current experiences. And since the development steps undergone by BEVs have so far been very short and big, this question was difficult to assess for many car owners, depending on their level of knowledge: only 9% believed that cars with electric drives will 'live' longer than combustion engines; 16% thought that both lifespans would be the same; and 17% did not give an answer. Negative experiences with battery-operated (small) appliances could also play a role here, but – and scientists from various disciplines agree on this – humans also have a certain inherent scepticism towards new things. If you then look at the KBA statistics, the average service life of a car is around 14 years. If only full battery-electric cars are considered, 90% of these almost 1.6 million cars are less than five years old. Only 1,087 BEVs were older than 14 years as of 1 October 2024. This shows that there is still a lack of long-term experience.

2 Chinese manufacturers move into focus

Most passenger cars from Chinese manufacturers have electrified drives. They are coming to Germany at a time when both the demand for electric cars and knowledge of Chinese car manufacturers is still very limited. Under these circumstances, these manufacturers are currently still finding it difficult to sell their vehicles in large numbers. If we add up all passenger cars from Chinese manufacturers in the passenger car population that were registered as of 1 October 2024, it comes to a good 66,000 units, 90% of which are BEVs. The brands listed in this KBA statistic were Aiyas, BYD, GWM, LEVC, Lynk & Co, Maxus, MG, NIO and XPENG. Strictly speaking, we should add Polestar, Volvo and Smart (the last two only with the unit numbers since these brands joined the Chinese group Geely). Overall, Chinese cars have already achieved a certain level of visibility on the roads in Germany in 2024. This was flanked by measures such as the sponsorship of BYD as the official electric mobility partner of UEFA Euro 2024. This general visibility can be gauged on the basis of the statements of all representative car owners in the survey. They were confronted with several statements about cars from Chinese manufacturers, which they could agree with or reject. The results are summarised in Fig. E6, which shows that 10% of all respondents

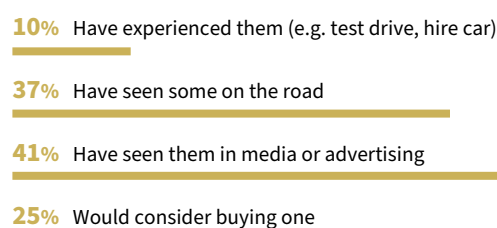
E6 have already had experience with vehicles from Chinese manufacturers. This may have come about with a test drive or when using a hire car. 37% of private car owners said they had encountered them in road traffic. A slightly higher percentage had noticed them in the press or in advertising. This was true of 41% of respondents, which can again be attributed to BYD's activities during the European Football Championship. As many as 25% of all respondents would consider buying such a vehicle. However, if a new manufacturer is not successful, the situation could arise where the owner is left alone with an electric car for which there are no more updates (Fisker is one such example).

25%

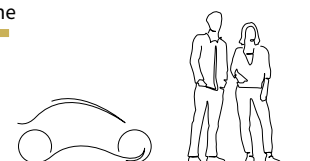
of car owners stated that they would consider buying a car from a Chinese manufacturer

E6 Statements on Chinese manufacturers' cars 2024

Multiple answers possible



Car owners



Source: DAT

3 Planning the switch to EVs

For electric mobility to be accepted by the broader public, the vast majority of car owners must be made to feel enthusiastic about this technology, prejudices must be overcome and confidence in this form of drive must be strengthened. However, since the end of the e-bonuses, in 2024 it has again been mainly the technology nerds who have bought an electric car, while the broader public continues to wait and see how things develop. Reports of greater ranges, higher energy density in the batteries and improved charging capacity are causing people to hesitate rather than to buy.

The specific situation surrounding people’s plans to go electric is shown in Fig. E7 for the first time as a trend over time, beginning in 2021. Three years ago, just under half of all car owners (46%) were still able to imagine switching, but this willingness has now fallen to 38%. This is certainly also due to the fact that technology nerds (‘early adopters’) have purchased a BEV: the proportion of those who have already switched to electric mobility has grown from one to four percent.

Also visible in the chart are those who cannot imagine making the switch. Their percentage has risen from 31% to 38% since 2021. In the same period, the proportion of those who are not sure has fallen from 22% to 20%. This means that within the large group of private car owners, the situation has become somewhat clearer in that a) an

equally large group for and against electric mobility has formed (38% each); b) those who were unwilling/unable to decide at the time of the survey have become fewer; and c) those who have already purchased an electric car have increased in number in the past five years.

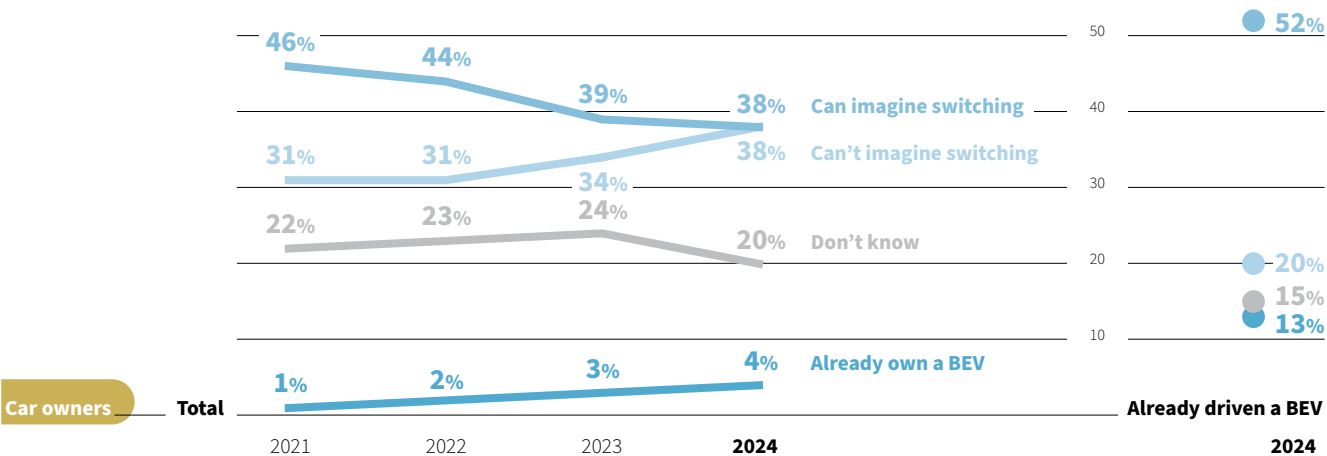
Willingness to switch increases with more knowledge

In this context, it is interesting to look at the switching plans of people who have already driven a BEV: at 52%, one in two of this subgroup could imagine switching to electric mobility – significantly more than the average (38%). And as many as 13% already owned a BEV (average: 4%). However, a hard core of 20% could not imagine switching from a combustion engine to a BEV despite their BEV experience.

Transformation takes time and knowledge

These results show that a transformation process as far-reaching as the switch to electric mobility in a country as large as Germany, with all its very special relationships with the automobile, takes time. However, a basic prerequisite is also the knowledge level of the consumer. Many prejudices and concerns still need to be overcome, while knowledge and experience need to be systematically built up. With 50 million cars in Germany, almost 90% of which are registered to private owners, the changeover will not be realised overnight.

E7 BEVs: car owners’ plans to go electric



Source: DAT

2.3 New-car buyers' perspective

1 Role of electrified drives

Previous surveys for the DAT Report have shown that the customer journey of a new- or used-car buyer usually takes around four weeks. During this time, different options, brands, segments, etc. are weighed up, and since the introduction of plug-in hybrids (PHEVs) and full battery-electric cars (BEVs), two additional drive types have been added to the combustion-only engines. The consumer can therefore choose whether to drive from A to B using electricity, liquid fuel, or a mix of the two. This decision-making phase is shaped by rational and emotional factors. However, it is also guided by reports in the media and political decisions on the subject of electric mobility. This type of drive was specifically promoted by the German government at the time in order to achieve the original target of 15 million fully electric cars by 2030. To this end, the German government had already initiated the first eco-bonuses/incentives in May 2016, which went through various adjustments and additions (e.g. the 'innovation premium') but came to an abrupt end in December 2023.

BEVs and PHEVs lost attractiveness by 2024

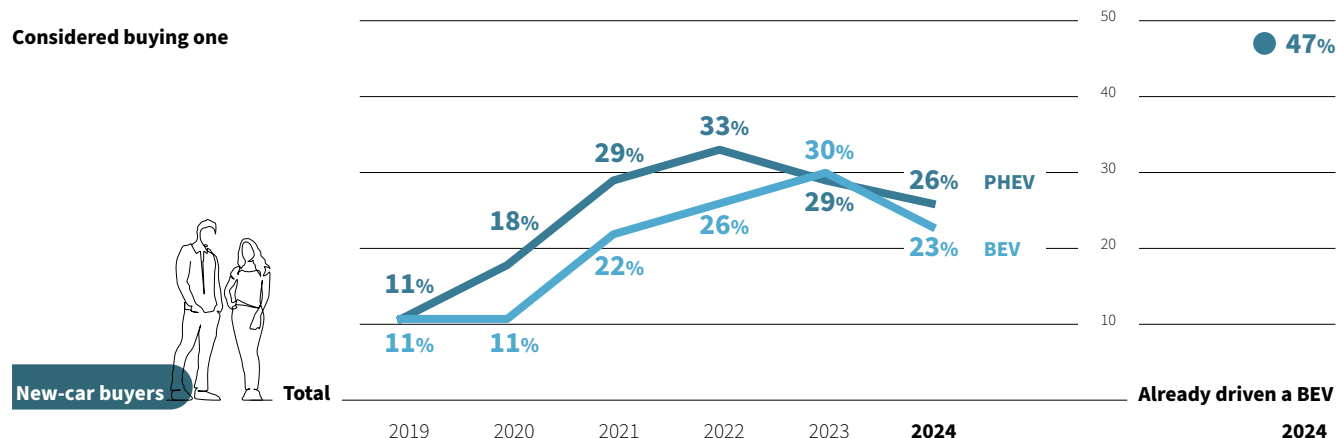
As a result, most consumers have kept on hearing about electric mobility over the past eight years and, depending on their interests, have followed the development steps to a varying degree. BEVs were much more often on the shortlist of new-car buyers than used-car buyers or car owners. This is why in recent years the DAT Report has always asked private new-car buyers to what extent they have considered a BEV and/or PHEV as an option. Figure E8 shows that interest rose sharply from 2019 and reached 33% for PHEVs in 2022. The peak for BEVs then followed in 2023 at 30%. In the car year 2024, approval rates fell significantly to 23% for BEVs and 26% for PHEVs. This may be due to the increased complexity of the models, but also to uncertainty among consumers as to whether now is the right time to make the switch. However, BEVs and PHEVs were considered significantly more often by people who had already driven a BEV: 47% of them considered a PHEV in the purchase decision process, and as many as 57% considered a BEV.

E8 E8 shows that interest rose sharply from 2019 and reached 33% for PHEVs in 2022. The peak for BEVs then followed in 2023 at 30%. In the car year 2024, approval rates fell significantly to 23% for BEVs and 26% for PHEVs. This may be due to the increased complexity of the models, but also to uncertainty among consumers as to whether now is the right time to make the switch. However, BEVs and PHEVs were considered significantly more often by people who had already driven a BEV: 47% of them considered a PHEV in the purchase decision process, and as many as 57% considered a BEV.

E8 Role of BEVs and/or PHEVs in purchasing process

Multiple answers possible

Considered buying one



Source: DAT

2 Pros and cons of combustion engines

At the end of the customer journey, every car buyer has decided on a drive type. The extent to which a careful consideration of the alternatives or a spontaneous impulse played the main role remains unknown. However, what is very clear is that in 2024 most private new-car buyers opted for a combustion engine and thus against a BEV. To get to the bottom of this purchase decision, the combustion-engine buyers were asked to indicate the three most important aspects that put them off buying a BEV. Figure E9 shows this in detail, and one thing is very clear compared to the previous year: the main reasons are no longer doubts about the manufacturers and their technology, but rather doubts about the capability of the charging infrastructure. For the first time, this is just ahead of range at 42% and thus represents the biggest rise in scepticism. All other points such as range (41%; 2023: 50%), costs (36%; 2023: 43%) and charging times (30%; 2023: 35%), i.e. topics for which the manufacturers are responsible, follow in the next few places and are all well below the previous year's figures. A lot has happened here and, if the industry is to be believed, a lot will happen in the future. What has not yet increased significantly is confidence in the drive battery (lifespan and uncertainty factor). At 29% and 27%

E9

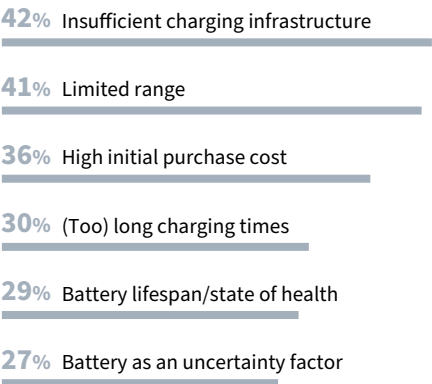
respectively, these last two points have even risen slightly compared to the previous year. However, according to the industry, there are a lot more innovations in the pipeline for EV drivers in the near future.

Technology nerds in particular bought BEVs

If you ask BEV buyers for their reasons for not buying a combustion engine, a different picture emerges. Since the end of the e-bonus programme, demand for EVs among consumers has declined. While this state subsidy was still the number one purchase criterion in 2023, in 2024, as can be seen from Fig. E10, the buyers of new BEVs were mainly and to a high degree those who simply fancied this new technology. At 59%, an increase of 24 percentage points, this was the main reason. This not only indicates the attractive technological development that EVs embody; but also that the EV is still – to exaggerate somewhat – a fan article. People who are enthusiastic about it will buy it, but the broader masses aren't yet convinced. For 48% of all private BEV buyers, this type of drive also suits their mobility needs, a substantial increase of eleven percentage points. This also illustrates the progress made in terms of range and suitability for everyday use. At 39%, the eco-aspect of electric cars remains one of the top three

E10

E9 Combustion-engine buyers 2024: reasons not to buy a BEV

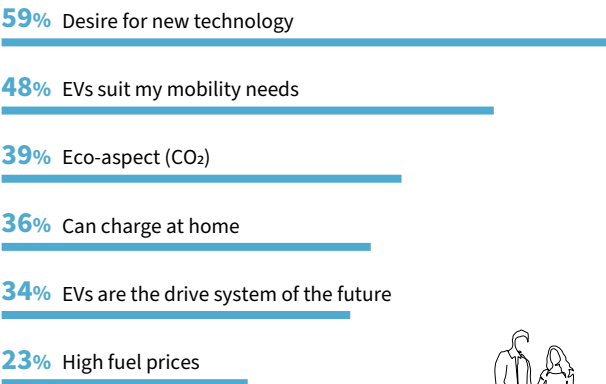


New-car buyers



Source: DAT

E10 BEV buyers 2024: reasons not to buy a combustion engine

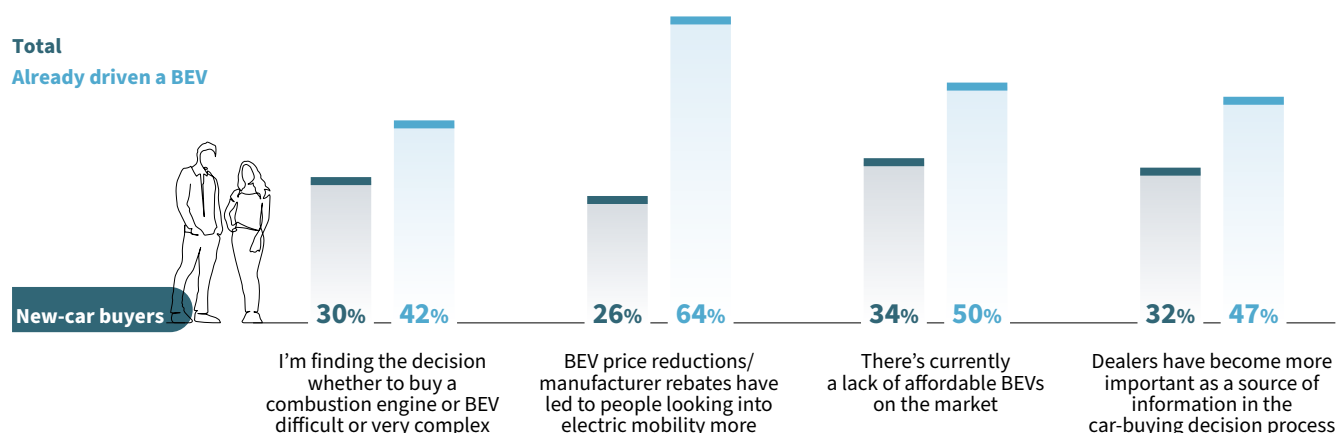


New-car buyers



Source: DAT

E11 Behaviour and assessments of new-car buyers in 2024



Source: DAT

reasons for purchasing and has played a key role in the decarbonisation of the transport sector since the introduction of the electric car. Another decisive factor for buyers was the private charging situation (36%) and the conviction that the electric drive is the drive system of the future (34%). At 23%, the issue of (high) fuel prices played a much lesser role in the purchase of a new BEV in 2024.

Level of BEV knowledge shapes behaviour enormously

E11 Figure E11 shows the extent to which experience with BEVs impacts (purchasing) behaviour. Basically, if people have a certain level of knowledge about electric cars, they see the purchase decision as more complex. No less than 42% of new-car buyers with BEV experience confirmed this. The average was just 30%.

When it comes to purchase prices and the activities of manufacturers in this regard – if we recall how many manufacturers partially overcompensated for the cancelled eco-bonus at the beginning of 2024 – 64% of new-car buyers who had already driven a BEV were aware of this development and therefore also looked more closely at electric mobility. For the average new-car buyer in 2024, however, these price adjustments played less of a role in their consideration of electric mobility: they led only 26% of them to look at electric mobility in greater depth.

BEV-experienced buyers lacked affordable e-car models

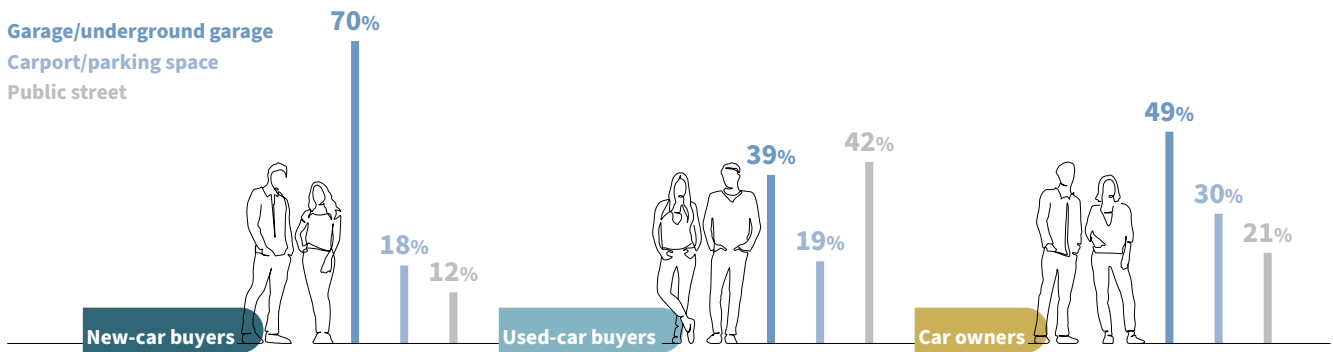
There is also a distinct difference between these two target groups when it comes to the question of affordable electric car models. While 34% of average new-car buyers

complained that there was a lack of affordable BEVs on the market, the figure for the group of BEV-experienced buyers was as high as one in two (50%). This means that although this group of people has experience and interest, and would be prepared to buy an electric car, the available choice did not match their financial expectations. They would have liked to see more affordable models on offer from manufacturers and importers.

More knowledge means a greater need for advice

Leaving the purchase price aside, though, the whole issue of buying a car was by no means trivial from the consumer's point of view. Given the increasing breadth of decisions that have to be made, virtually every private new-car buyer needed advice on electric mobility and everything that goes with it. Here, too, the statements of people who have already driven a BEV were particularly interesting: 47% of them confirmed that the dealer had become more important as a source of information in the purchasing decision process. Among the average new-car buyers, on the other hand, only just under a third (32%) agreed that this was the case. This shows that someone who has looked into the topic of electric mobility more than average actually needs more advice, not less. This is partly due to the increased complexity – be it battery size, charging capacity or information on private charging options.

E12 Parking options for the car 2024



Source: DAT

3 Parking options for one's own car

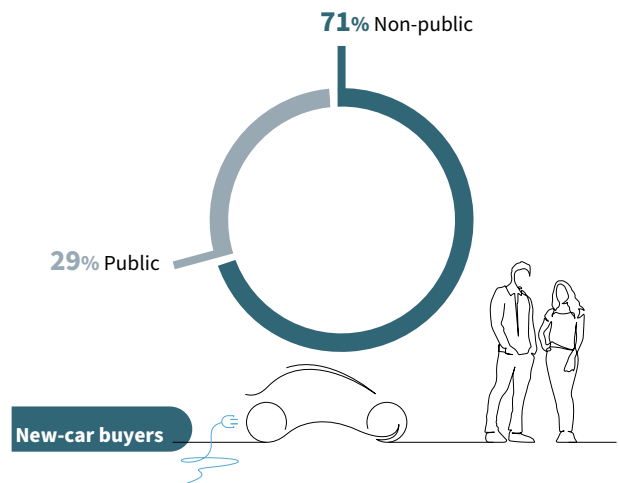
The ease with which an electric car can be charged at home is highly relevant for its use. It requires the owner to have access to a garage, underground car park or carport at their place of residence. To find out whether this was the case, we asked about the private parking situation.

E12 Figure E12 shows that 70% of all private new-car buyers (around 665,000 people) were in the comfortable situation of owning a garage or having their own parking space in an underground car park. They could park their car there and charge it if necessary. Furthermore, 18% of new-car buyers confirmed that they had a carport and/or a permanent parking space. However, this was not true to the same extent for either used-car buyers or the average car owner. 42% of the more than six million used-car buyers parked their car on a public road. As many as 39% said they had a garage or underground parking space, while 19% had a carport or permanently allocated parking space in 2024. Of the more than 42 million average private car owners, 49% had a garage/underground car park, 30% parked in a carport/parking space and 21% on the street. But why is this parking situation so important? There is a close correlation between parking at home and the acceptance of electric mobility in general: 85% of all car owners, 85% of all new-car buyers and 92% of all used-car buyers stated that they would not consider buying an electric car if they could not charge it at home. In other words, the basic prerequisite for a successful ramp-up of electric mobility is always the issue of private charging, and this in turn requires a permanent parking space with an appropriate (eco) power supply.

Private charging is the rule

A look at BEV buyers confirms this. 71% of all charging processes by private BEV buyers, as shown in Fig. E13, took place in 2024 in a non-public i.e. private setting (and, where permitted, also at the workplace). 29% charged in public spaces, i.e. at charging points that are accessible to the general public and therefore are subject to different tariffs. This is roughly in line with a study by the National Centre for Charging Infrastructure, which examined the charging behaviour of private individuals with electric vehicles and a wallbox of their own in 2024. According to the analyses, 70% of respondents used private charging more than once a week.

E13 BEV buyers' most frequent charging location 2024



Source: DAT

2.4 Used-car buyers' perspective

1 Fundamental stance on electric mobility

The used-car market for full BEVs is still very small compared to the numbers of ownership transfers for combustion-engined vehicles. Between 2013 and 2018, only a four-digit number of BEVs changed hands each year (in 2013 there were only 1,189; five years later there were already 7,490 units). In 2019, the number of BEVs changing hands exceeded the 10,000 mark for the first time with 11,376 units. In the years that followed, the number of transfers of ownership increased significantly from year to year, reaching almost 100,000 units for the first time in 2023. The year 2024 saw no less than 157,887 transfers of ownership of BEVs between January and November, but this is still only a small proportion of less than three percent compared to the just over six million used combustion vehicles that changed hands.

BEV transfers of ownership vs. new private registrations

What is interesting about the development of BEV transfers of ownership is that during 2024, these were at times significantly higher than the number of new BEVs registered by private individuals: in November 2024, for example, the KBA registered a total of 10,831 new private BEV registrations and 16,660 transfers of ownership of BEVs. From the beginning of the year until November 2024, there was a cumulative total of 157,887 BEV transfers of ownership, as mentioned above, compared with 125,462 new private BEV registrations. Speaking of new registrations: in the times of the high subsidies, the shares of new private and commercial BEV registrations were 50:50. In 2024, this shifted strongly in favour of new commercial BEV registrations. They now account for over 63% of all newly registered BEVs. Due to the sharp increase in new commercial BEV registrations, especially in 2022 and 2023, which could still benefit from a government subsidy until August 2023, these vehicles will return to the used-car market in larger numbers. These are often lease returns that received a subsidy and were also chosen by company car drivers because of the tax advantages (0.25 percent taxation).

Reasons against a BEV

All used-car buyers who opted for a combustion engine in 2024 were asked why they chose a combustion engine and not a BEV. The answers are illustrated in Fig. E14.

E14

48% stated that the high purchase costs had put them off buying a BEV. This is a decrease of six percentage points compared to the previous year and shows that prices for used BEVs have also fallen slightly. At 45% (2023: 50%), the limited range was in second place, followed by the (too) long charging times and the lack of charging infrastructure. Both points were cited by 29% as a reason for not buying, and both points have become noticeably less relevant compared to the previous year, as a lot has changed in terms of technology and infrastructure. Similar to the previous year, 24% confirmed that they prefer combustion technology on principle, and only one in five (22%) still saw the drive battery as an uncertainty factor and so decided against buying a used electric car. This last point also played a less important role in 2024 than the year before (26%).

E14 Combustion-engine buyers in 2024: reasons not to buy a BEV

48% High initial purchase cost

45% Limited range

29% (Too) long charging times

29% Insufficient charging infrastructure

24% Prefer combustion technology

22% Battery as an uncertainty factor

Used-car buyers



Source: DAT

2 Used BEV as a purchase option

The following question, which was posed to both new- and used-car buyers, seeks to analyse the general attitude towards used BEVs: “Would you at all consider buying a used battery-electric vehicle (BEV) as your next car?”

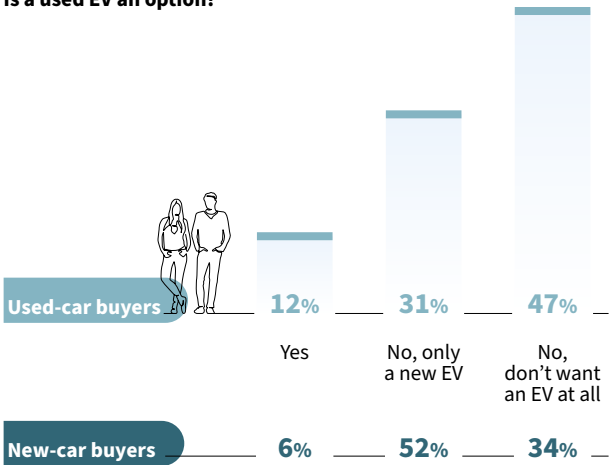
E15 The answers are shown in Fig. E15. A greater resistance to electric mobility was evident among used-car buyers than among new-car buyers, as almost half of the used-car buyers surveyed (47%) were fundamentally against an e-car – whether new or used. Just 31% of used-car buyers would consider a BEV generally, but then only if it were brand new. Only 12% could imagine buying a used BEV – including 6% if it were a year-old car – at the time of the survey. The situation is completely different for new-car buyers. 52% could imagine getting a BEV, but only as a new car. 34% were completely against an electric car, which is five percentage points more than in 2023, and only 6% could imagine buying a used BEV (5% if it was a one-year-old car).

Warranty on the battery is seen as essential

One of the key questions that the industry is increasingly asking itself is how to boost the attractiveness of used electric cars. The number of these vehicles is increasing from month to month as these previously new cars are returned from leasing arrangements in larger numbers and are then placed back on the market. In order to determine

E15 Pre-owned BEV as a purchase option in 2024

Is a used EV an option?

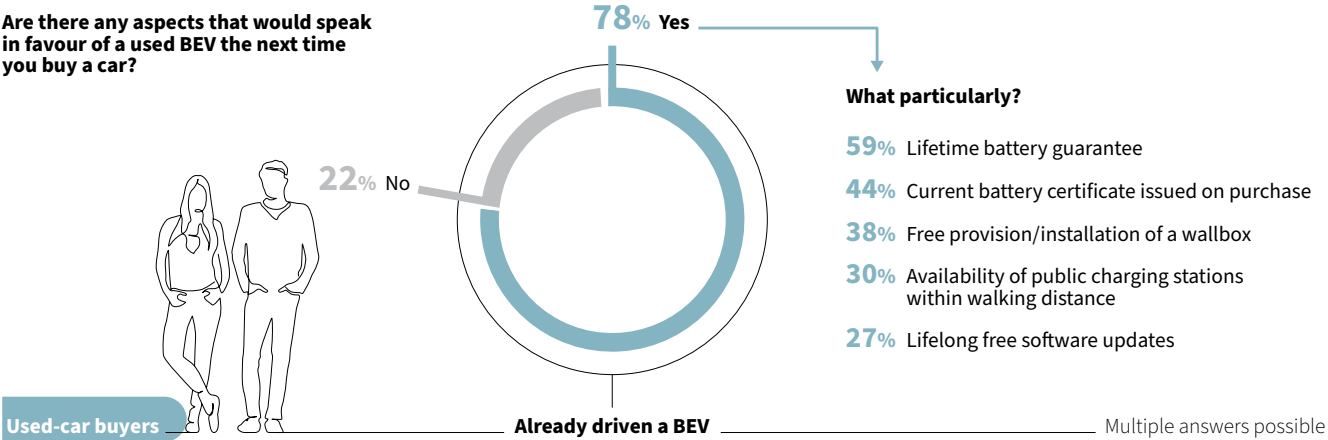


Source: DAT Difference to 100% = no answer

for the DAT Report how the attractiveness of such cars could be increased, used-car buyers who already have BEV experience (11% of all used-car buyers) were told to assume that the purchase price of used BEVs is identical to that of used combustion engines. This question was asked for Fig. E16: “Which of the following aspects would make you think about buying a used BEV the next time you buy a car or would make it interesting for you?” This prompted question resulted in the following insights: 22% of this sub-

E16 Used-car buyers’ assessment of used BEVs in 2024

Are there any aspects that would speak in favour of a used BEV the next time you buy a car?



Source: DAT

group did not find any of the aspects mentioned appealing and so would generally not consider a used BEV. However: 78% found the topic generally worth considering. The top three mentions that would make used BEVs more attractive were the following – and one possible factor stood out in particular: a lifetime warranty on the battery (59%). This underscores people's need for security with respect to this still young technology. For 44%, a battery certificate would be a positive argument in favour of used BEVs, as for them it would contribute to the transparency of used electric vehicles. For 38%, this was followed by the provision of a free wallbox. However, it should be borne in mind that many used-car buyers would have no chance of installing a wallbox at their place of residence.

Used-car leasing not yet a solution

Due to the increasing numbers of young used BEVs, manufacturers are also launching some activities in the leasing of used BEVs. Private car buyers have nothing at all against leasing a brand new BEV – in fact they prefer it as a form of purchase. But for used-car buyers, this form of use plays an almost negligible role. Although used-car buyers are increasingly financing their vehicles with a loan, leasing is only taking place in the very low single-digit percentage range. The idea of many manufacturers is that they could make it easier for used-car buyers to access electric mobility through leasing. To find out whether this might work, we

posed the following question: “Would you consider leasing a used electric vehicle (max. three years old) when you buy your next car?”. Of all used-car buyers with BEV experience, Fig. E17 shows very clearly that 17% could imagine doing so, while 68% could not.

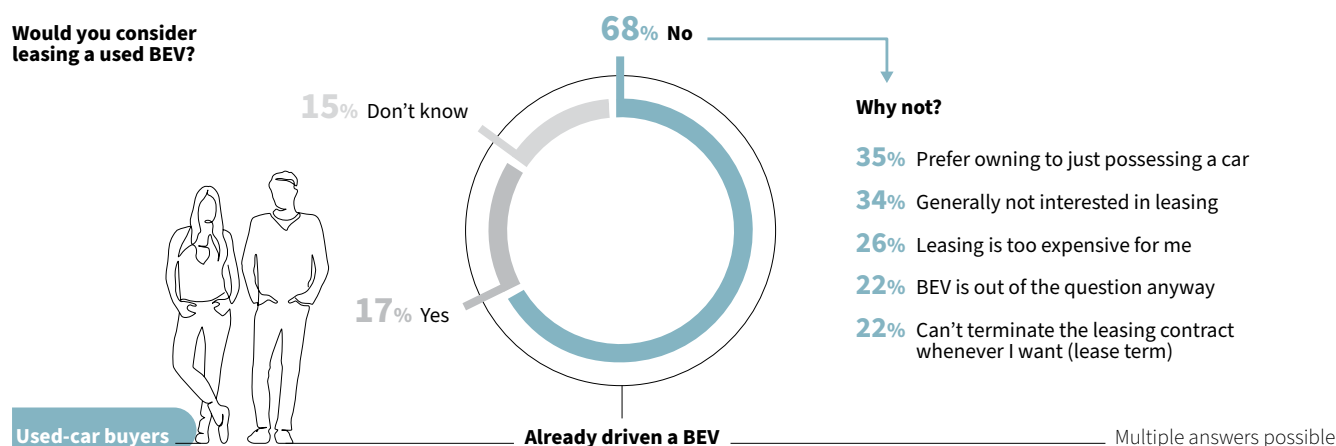
E17

Lukewarm interest in BEV used-car leasing

The used-car buyers who rejected BEV used-car leasing were specifically asked for their reasons. Where multiple answers were possible, the responses were quite close to each other: 35% rejected BEV used-car leasing because they value ownership rather than just possession. A further 34% were generally not interested in leasing. This form of vehicle use generally plays hardly any role for used-car buyers; it is not (yet) anchored in their consciousness. 26% stated that the leasing offers were too expensive for them. The final two reasons for rejection given were the general rejection of BEVs (22% each) and again the leasing contracts, which are criticised for their lack of flexibility.

E17 Opinion of used-car buyers on leasing of used BEVs 2024

Would you consider leasing a used BEV?



Source: DAT



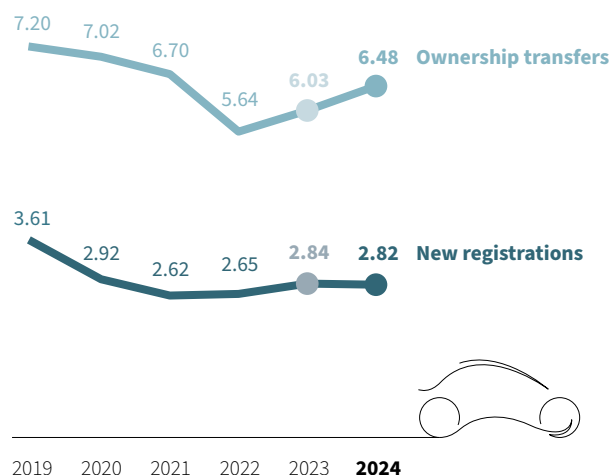
Buying a car

**Customer journey of used-car
and new-car buyers**

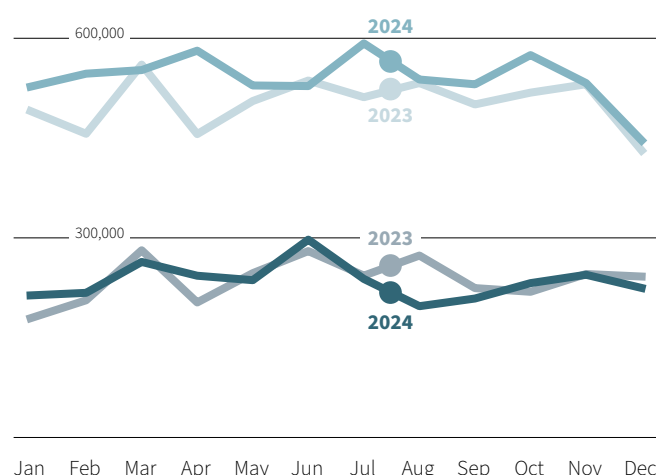
3.1 Market situation

P1 Ownership transfers and new registrations

Annual figures in million units



Monthly figures in units



Source: KBA

1 Automotive market 2024

The 2024 car year was characterised by a slight decline in new registrations and strong ownership transfer figures. According to data from the Federal Motor Transport Authority (KBA), the cumulative number of newly registered vehicles was only very slightly below the previous year (-1.0% less than 2023) and reached 2,817,331 units. In contrast, transfers of ownership rose by a significant 7.4% over 2023, to 6,479,953 cars. Private owners accounted for 32.5% of all new registrations, or just 915,633 units. Over two-thirds were commercially registered new vehicles (1,901,698 units), i.e. registrations for company fleets, vehicle dealerships, vehicle construction and car hire companies. Looking at the new- and used-car market over time, as shown in Fig. P1, a continuing stagnation in new registrations in recent years is very noticeable. 2024 was 21.9 % lower than the last pre-Covid year 2019. Transfers of ownership were just under 10% less than in 2019. Comparing the different months, 2024 was characterised by a slight spring upturn, which lasted until the middle of the year in terms of new registrations. The market then fell sharply and was barely able to make up any ground towards the end of the year. Given the poor overall economic situation, the companies with their commercial registrations couldn't make up for the few private new registrations. There were three small peaks in transfers of ownership in April, July and October. The market then fell sharply towards the end of the year. There are several reasons for the general reluctance to buy, including the uncertain economic situation of the country and its individual citizens. Consumers' critical perspective on electric mobility also remains an issue. 77% stated that they intend to keep their current vehicle for longer in order to wait and see how electric mobility develops. Speaking of electric mobility: the desired ramp-up ground pretty much to a halt in 2024. In total, 380,609 BEVs were registered, which represents over a quarter less full BEVs (-27%) than in 2023.

2 The previous car

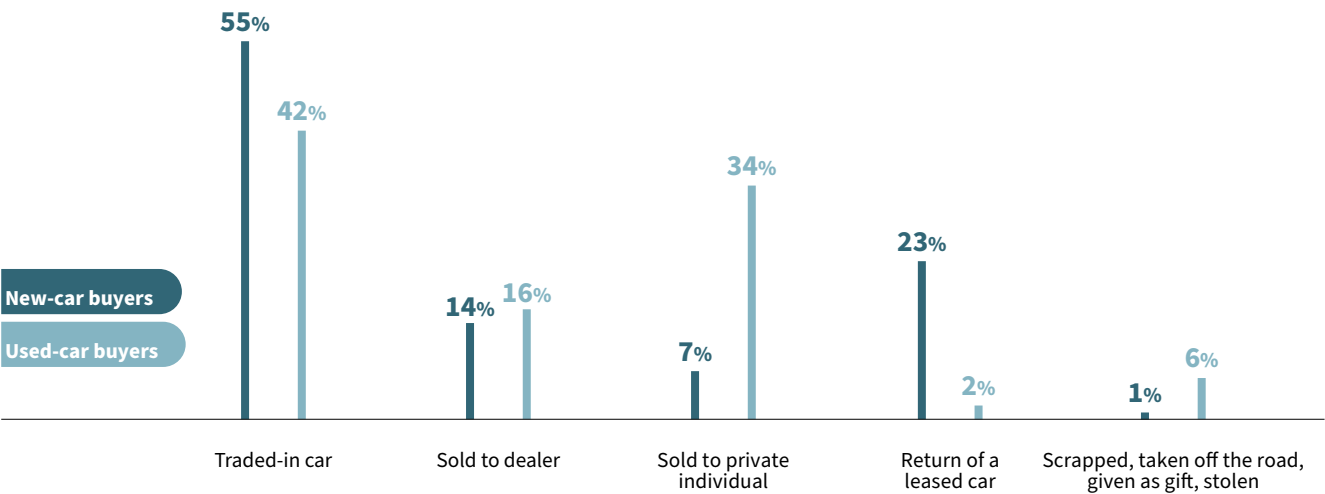
When a car is purchased, the vehicle that it replaces has been referred to in the DAT Report as the ‘previous car’ for over 50 years. From the car buyer’s point of view, previous cars are either sold on the private market, given away, scrapped or sold to dealers. In the latter case, this can take the form of a trade-in transaction when the new vehicle is purchased from the dealer, or the previous vehicle may be sold to a dealer without another purchase being made. If the vehicle is leased, it is also returned to the dealer or directly to the leasing company at the end of the term. As mentioned above, other takers for the previous cars can be family or friends – or, as a last resort, the scrapyard. Around 50 years ago, the life cycle of almost one in four previous vehicles purchased by a used-car buyer ended in this way. Today, the scrapping rate is in the low single-digit range.

Takers of previous cars

P2 Figure P2 shows the ‘channel’ used by car buyers in 2024 to sell or dispose of their previous car. As in the previous year, the majority of new-car (55%) and used-car buyers (42%) opted for a trade-in. From a car buyer’s point of view, this is the simplest option: the dealer takes the

previous vehicle in payment and offsets its value against the purchase price or the amount owed on the new car. However, the two buyer groups differ significantly when it comes to who else took over their old car. The second most common channel for previous cars of used-car buyers was private buyers. However, their importance has fallen again compared to the previous year – from 38% to 34%. At a lower level, this is also true of new-car buyers. Here, just seven percent sold their previous car to a private individual. This is connected to the fact that, as in the previous year, there was a reluctance to buy on the private market. In contrast, the relevance of sales to dealers increased. Selling to a dealer without a making another purchase was relatively close for new- and used-car buyers at 14% and 16% (2023: 10% and 12%). Dealers had apparently advertised this channel more heavily and presumably also paid higher prices in order to enrich their range with older vehicles. Dealers are free to determine their own product strategy when it comes to buying from private owners – unlike with leasing returns. The return of leased vehicles was on the agenda for 23% of new-car and 2% of used-car buyers in 2024. As in the previous year, the scrapping rate for previous cars is in the low single-digit range for both buyer groups.


P2 Buyer of car buyers’ previous car 2024
Basis: Replacement buyers



Source: DAT

P3 Used-car buyers' previous car 2024

Basis: Replacement buyers




Previous car was ...	Avg. age	Avg. kilometres	Avg. ownership
... used	12.5 years	145,784 km	72 months
... new	11.1 years	132,299 km	130 months
Avg. total	12.3 years	143,611 km	81 months

Source: DAT

P4 New-car buyers' previous car 2024

Basis: Replacement buyers



Previous car was ...	Avg. age	Avg. kilometres	Avg. ownership
... used	11.1 years	119,131 km	77 months
... new	6.7 years	86,068 km	78 months
Avg. total	7.6 years	92,622 km	77 months

Source: DAT

Characteristics of the previous cars

P3 Figure P3 illustrates the characteristics of the used-car buyers' previous cars. What is striking in comparison to the previous year: the age and ownership period were roughly on a par with the previous year, but the overall reduction in mileage is very noticeable. Instead of 153,012 kilometres in 2023, used cars were sold with an average of 143,611 kilometres in 2024. This was particularly pronounced if the previous car had also been bought pre-owned – which was the case for 84% of used-car buyers who had previously owned a car. These previous cars which had been bought used were owned for 72 months and had 145,784 kilometres (2023: 157,446 km) on the clock at the end. The situation is completely different for new-car buyers and their previous cars. Their characteristics are depicted in Fig. P4. On average, these vehicles were 7.6 years old, were owned for 77 months

and had 92,622 kilometres on the clock at the end of the ownership period. What is striking here: in contrast to the previous year, this represents a significant increase in age and ownership period with almost identical mileage. The ownership period has increased in particular for those vehicles that were previously purchased as used cars – this was the case for 20% of new-car buyers with previous cars. The majority of new-car buyers had also previously purchased a new car, which they had also owned for slightly longer (78 months instead of 74 months in the previous year).

Due to the increased supply of new cars, including numerous discounts, more former used-car buyers opted for a new car in 2024. They parted company with their previous car after 77 months. Last year, such vehicles were sold after just 65 months.

3 Buying a car in times of change

For the current DAT Report, buyers of new and used cars were once again asked about compromises they made in the purchasing decision process – in the following words: “Was a change of plan necessary during the decision process that led to the purchase of your current vehicle? In which areas were you ultimately forced to choose something other than you had originally planned?”

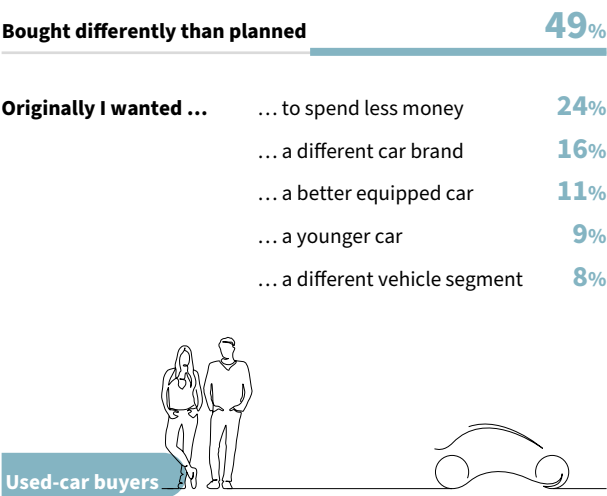
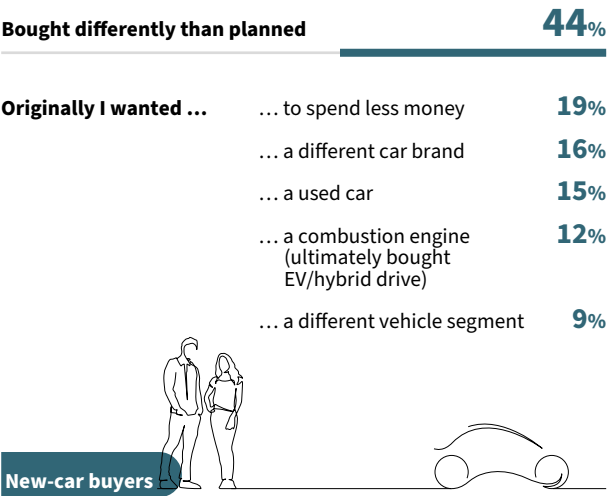
P5 Figure P5 illustrates the answers separately for new- and used-car buyers. Among new-car buyers, 44% stated that they had bought differently than planned. The top five answers show what this meant. In first place once again was “Wanted to spend less money”. This is hardly surprising in times when purchase prices remain high. The answer “Bought a different car brand” was in second place in 2024. In terms of the brand, it is noticeable that once again many more buyers of import brands gave this answer than those who bought a car from a German manufacturer. This is understandable, given the wide variety of brands among importers. “Bought a used car” took third place (4th place in the previous year). This shows that more new-car buyers than in the previous year had also considered buying a used car (20% instead of 15% in the previous year), but ultimately decided in favour of a new car. 12% of new-car buyers underwent a rethink in favour of an electrified car, and 9% had initially planned to buy a different vehicle segment.

Wider range of available cars makes itself felt

Among used-car buyers, the number of those who bought (completely) differently than originally planned is significantly lower than in the previous year at 49% (2023: 56%). The evidently greater variety of available choice was particularly noticeable in this question. After years of shortages, prospective buyers were once again able to choose from numerous young and older used cars. Nevertheless, the statement “wanted to spend less” was once again right at the top of the list (2024: 24%). This was also mentioned much less frequently than in 2023 (32%), which can be attributed to the slight decline in used-car prices. “Bought a different car brand” was next in the list at 16%. This is also consistent with the finding that more buyers remained loyal to their brand in 2024 – they had originally intended to buy a different brand, but then stuck with the existing one. A better-equipped or younger car was favoured by 11% and 9% respectively. However, both aspects played a much lesser role than in the previous year due to there being a good supply of somewhat younger and therefore better-equipped used vehicles. As in the previous year, rounding off the top five responses at 8% was the statement that they had planned to buy a used car from a different vehicle segment.

P5 Car buying: plan vs. reality 2024

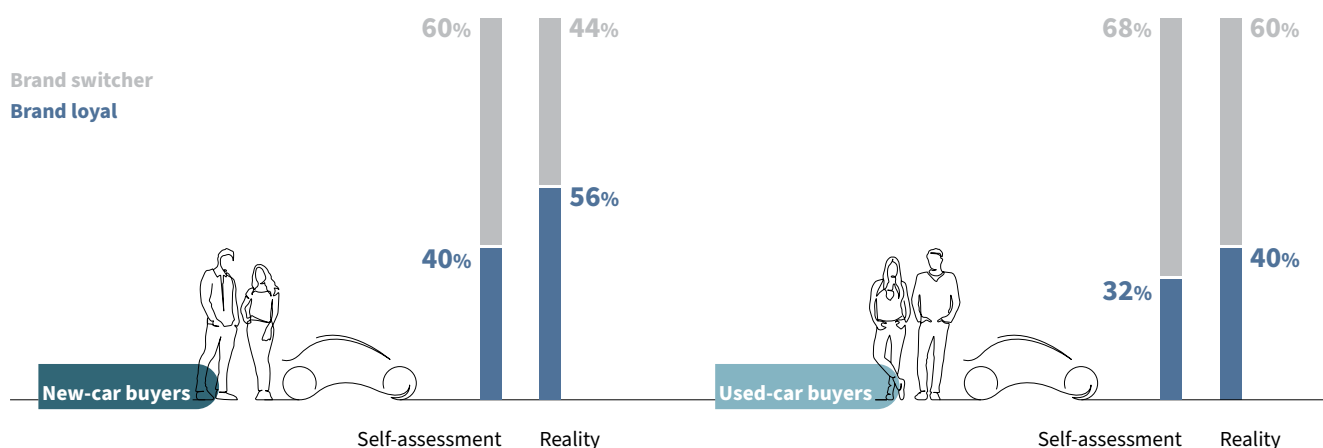
Multiple answers possible



Source: DAT

P6 Car buyers and their relationship to the car brand 2024

Basis: Replacement buyers



Source: DAT

Brand loyalty

P6 Figure P6 shows how buyers feel about their car brand. First, new- and used-car buyers were asked to state their personal view of their brand loyalty ('self-assessment'); then we looked at whether or not they had switched brands at the time of purchase ('reality'). We found that in reality, people are more loyal when buying a car than in their own assessment. 40% of all new-car buyers said of themselves that they were loyal to a single brand, whereas 56% actually ended up being faithful to the brand in their current car purchase (both an increase on the previous year).

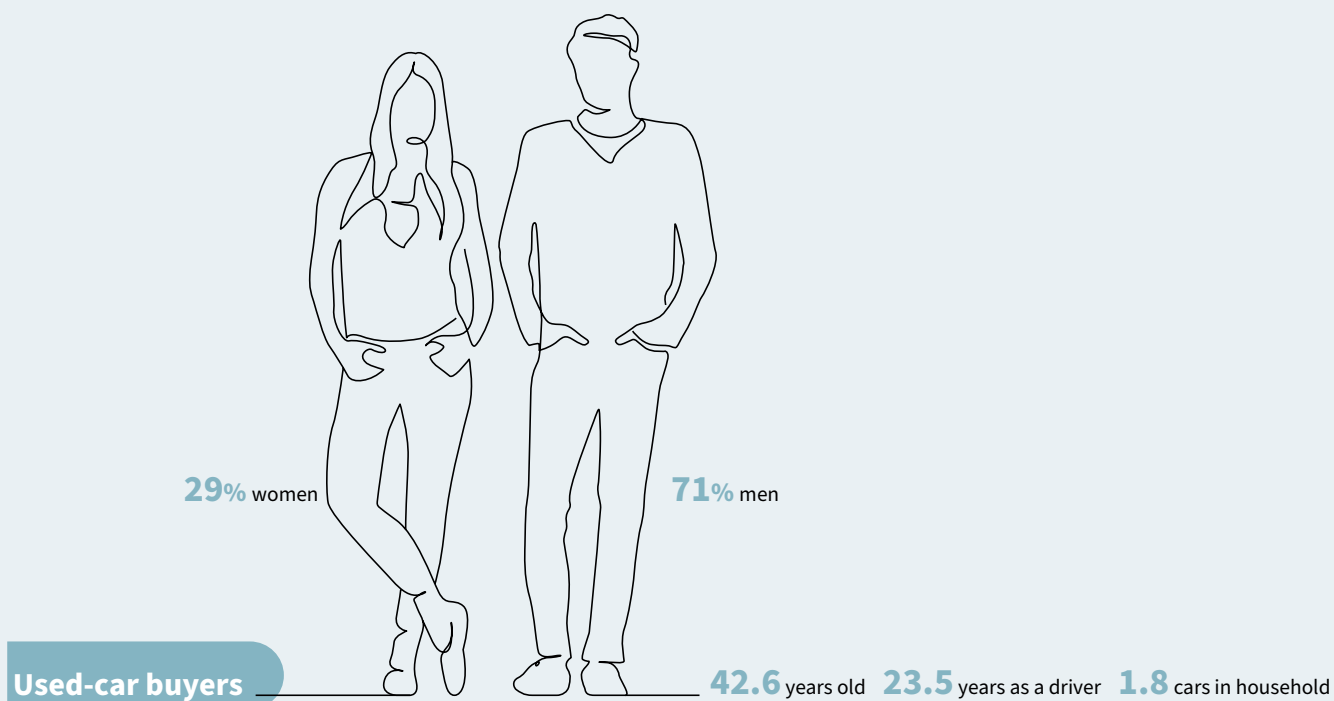
Among used-car buyers, actual brand loyalty (40%) was also higher than the self-assessment (32%). The group of brand switchers can be broken down even more granularly. Two-thirds switch between two to three brands, while the remaining third are completely indifferent to the brand. The latter group remained at the same level as the previous year, meaning that the proportion of buyers who switch between two or three brands has decreased.

Brand experience plays an important role when buying

Another aspect in this context is the experience that a car buyer has had with a brand. In response to the question: "I chose my current brand of car because I have had positive experiences with it in the past", 45% of all used-car buyers said this was the case. This attitude is more pronounced among buyers who purchased their used car from a franchised dealer (51%). The experience with a brand is even more clearly measurable among new-car buyers: 61% confirmed that they had ultimately decided in favour of their current car brand because of their previous positive experience with the car brand.

45%
of used-car buyers
opted for a particular
brand because they had
already had positive
experiences with the
brand in the past

P7 The average used-car buyer 2024



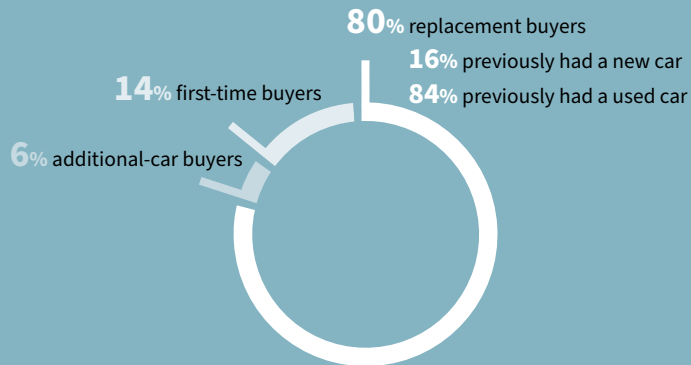
14% considered buying a factory-new car too

69% considered current purchase an absolute necessity

32% are generally not firmly attached to one brand

42% park on public street, have no parking space

49% bought differently than originally planned



▼

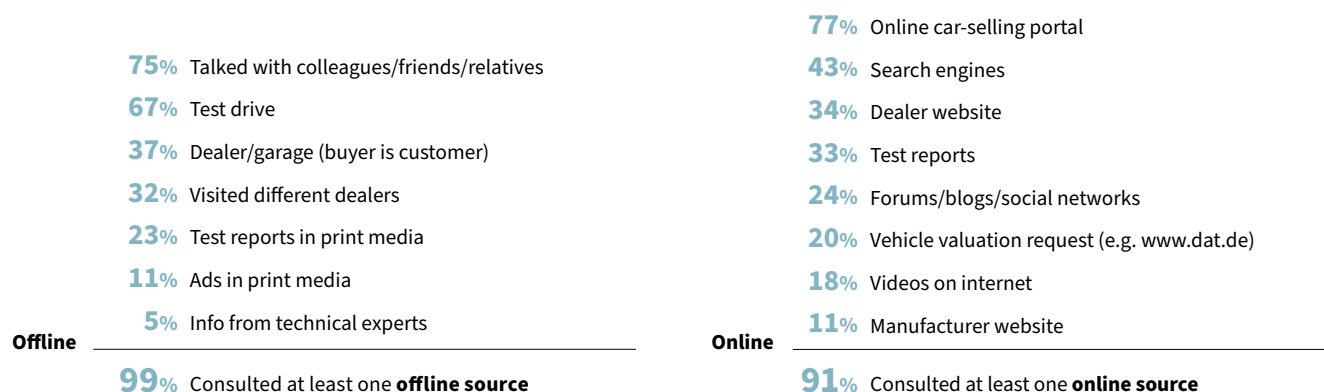
The used-car buyer had a monthly net household income of **EUR 3,690**

The used-car buyer spent **EUR 18,600** on his car

▲

3.2 Used-car purchase

P8 Information sources for used-car buyers 2024



Source: DAT

1 Information behaviour

The car was as indispensable as ever for many people in 2024. Despite the climate debate, changes in mobility behaviour and continued high prices, the importance of owning a car in Germany remained as high as ever. No wonder, then, that there was a slight rise in the number of people who felt that their current purchase could not be postponed any longer. Figure P7 shows that for more than two-thirds of all used-car buyers (69%), the car purchase was absolutely necessary. Owning a car was particularly relevant for young buyers up to the age of 29, as 81% of them stated this. In this context, it is striking that the percentage of (mainly young) first-time buyers has risen noticeably over the previous year, from 11% to 14%. In contrast, the general characteristics of used-car buyers in 2024 have hardly changed compared to the previous year.

Relevance of direct contacts continues to increase

Used-car buyers sought information intensively from online and offline sources. 99% of all used-car buyers used at least one offline source. The number one source in 2024 was talking with people in one's personal environment.

Figure P8 shows that its relevance rose to 75% (previous year: 70%). There was also a slight increase to 37%

(2023: 34%) in direct contact with the dealer or the garage where buyers have their servicing done. In addition, the test drive remains in the top three places at 67%. Clearly, used-car buyers were looking even more for 'real' contacts. From the dealer's point of view, this is advantageous because it allows them to inspire their customers and turn them into 'fans'.

The general use of online sources has fallen slightly to 91% (2023: 95%). The car-selling portals lost out significantly: at 77% (previous year: 82%), they reached their lowest level in the past five years. Search engines and social networks were also used less. The dealer website, on the other hand, increased slightly to 34% (2023: 32%). It is noticeable that test reports became more important. At 33%, car buyers used online test reports significantly more frequently than in the previous year (2023: 22%). Printed test reports also increased slightly. Used-car buyers wanted to boost their own knowledge with facts and precise information. Evidently, such publications served the needs of buyers better than 'expert' knowledge of doubtful reliability on social media. Vehicle data queries also increased (2023: 15%), which confirms the desire for fact instead of fiction.

2 Role of the internet

Buying a car is nowadays unthinkable without the internet. 91% of used-car buyers used this medium as a source of information. Although its share declined compared to the previous year, it remained a central component of the customer journey. The slight downward trend indicates that personal contacts with one’s own environment were in greater demand. This is also supported by the high popularity of offline sources (99%). Direct contacts with dealers also increased. More cars were once again available at dealerships, which meant that used-car buyers were often able to avoid extensive research on the internet. This is also shown in Fig. P9, for which used-

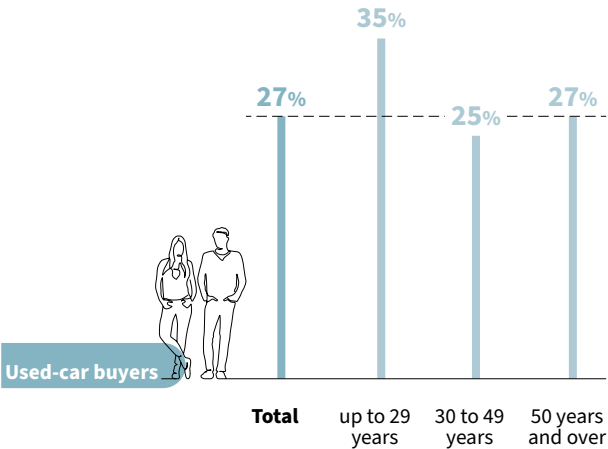
P9 car buyers were asked to assess the statement “I found my current car via a vendor/used-car exchange on the internet and then bought it”. Overall, 27% of all used-car buyers confirmed this, three percentage points less than in the previous year. This also shows that used-car buyers once again cultivated more direct contacts. It is particularly noticeable in the 30 to 49 age group. They tended more to obtain information directly and drove to the dealership to look at available used cars. 25% (-6 percentage points compared to 2023) of them found their car online and bought it offline. This behaviour also corresponds to the observation that this age group has become less active on the internet overall. On average, half of all used-car

buyers used the internet merely for general information purposes, while 23% used neither the internet nor used-car exchanges.

Growing openness to online-only car-buying process

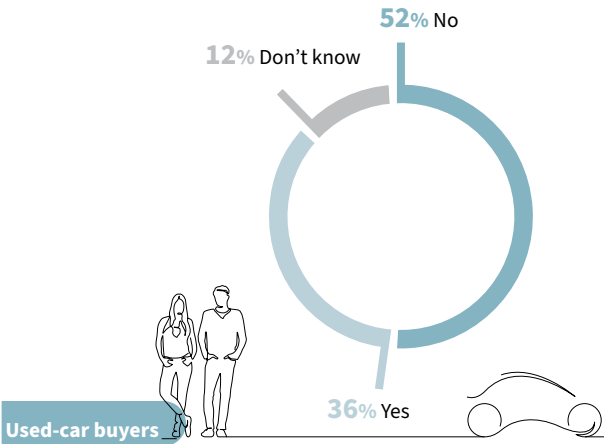
Although the relevance of talking personally with colleagues or acquaintances has continued to increase, there is a growing willingness to go through the entire used-car purchase process online. At least in theory. Figure P10 shows that more than one-third of all used-car buyers, or 36%, can imagine a car-buying process that takes place completely online. In the previous year, this was true for just 22%. 12% are still undecided, which is almost the same as last year. In practice, the percentage of online-only purchases is still marginal at 0.8%. It would appear that the reluctance to complete the entire process online is high, and that buying a car is presumably very closely linked to the human component. Customers expect a direct counterpart. They may also be afraid of not having a direct point of contact if their car ever needs servicing. In the case of a used car, they need local access to servicing options. It is interesting to note that buyers of older used cars are more likely to consider an online-only purchase than buyers of younger used cars. It’s possible that they assume that they don’t need a dealer involved.

P9 Used-car buying process: online research, offline purchase in 2024



Source: DAT

P10 Openness to online-only used-car buying process (from initial research to purchase) in 2024



Source: DAT

P11 Assessment criteria when buying a used car 2024

Rating scale from 1 (very important) to 4 (unimportant)



Used-car buyers

Source: DAT

3 Purchase criteria

As in previous years, reliability was the most important assessment criterion when buying a used car in 2024. Its importance even increased further and, with a score of 1.17 (2023: 1.22), is in first place by a clear margin. The fact that car reliability is at the top of the list is certainly also due to the prevailing general mood, as other means of transport are seen as increasingly unreliable. So a reliable vehicle is a top priority.

In the survey, used-car buyers were asked to rate 19 predefined criteria on a four-point scale from 1 'very important' to 4 'unimportant'. Overall, the rankings remained very similar to the previous year, with the top four places even remaining identical to 2023. Figure P11 shows that their significance nevertheless increased slightly in each case, as almost all the criteria to be assessed were generally rated at a higher level.

P11

Focus on safe and reliable vehicles

The factor "No accident history" is also very important for used-car buyers, which is why this criterion came in second place with a score of 1.31. An accident-free vehicle is often seen as more reliable, which is why it has this high priority. For dealers, the zero-accident history is therefore a relevant sales argument to emphasise the reliability of their vehicles. Used-car buyers want to be able to rely on their own four wheels, and there is still quite a lot of uncertainty with regard to other drive types or electric mobility, which is why these criteria occupy the top positions in the ranking.

Warranty coverage and purchase price also more important

The scope of the warranty has gained in significance. With a score of 2.04 (previous year: 2.22), this aspect has also become much more important for used-car buyers. It is another way in which buyers express the need for safety and reliability. What's more, the proportion of used-car buyers purchasing from franchised dealers has risen. Buyers have higher expectations of them, which are also reflected in the scope of the warranty.

Used-car buyers continued to attach great importance to the purchase price. Consumers' price sensitivity is evidently still high, and it is very important for used-car buyers in particular to obtain affordable mobility.

97%

of used-car buyers rated the purchase price as an important or very important criterion

22%

of all used-car buyers made a conscious decision to buy a more economical car for ecological reasons

Prestige value and design are regaining significance

The prestige value of a vehicle likewise became more important in 2024. This is confirmed not least by the high relevance of the appearance and design criterion (4th place) and the increased importance of the car brand, which improved by three places with a score of 1.74 (2023: 1.90). Evidently, the appearance of their vehicle was important to used-car buyers. The fact that the car brand has gained in significance is certainly also due to the greater choice of vehicles available in 2024. It was once again easier to find one's desired car. In addition, certain brands are seen by buyers as a kind of promise of security and thus contribute to the desired reliability.

Eco-friendliness slightly more important again

While the importance of eco-friendliness has fallen steadily over the past three years, it rose slightly again in 2024, reaching a score of 2.34 (previous year: 2.49). Although environmental issues now play a somewhat greater role in society in general, this aspect is relegated to the lower ranks by other criteria when a used car is bought. At the same time, the fuel consumption criterion slipped from fifth to ninth place with a score of 1.84 (previous year: 1.74). One could assume that there is a connection to environmental awareness here, but due to the relatively low fuel costs in 2024, this topic has fallen somewhat out of focus.

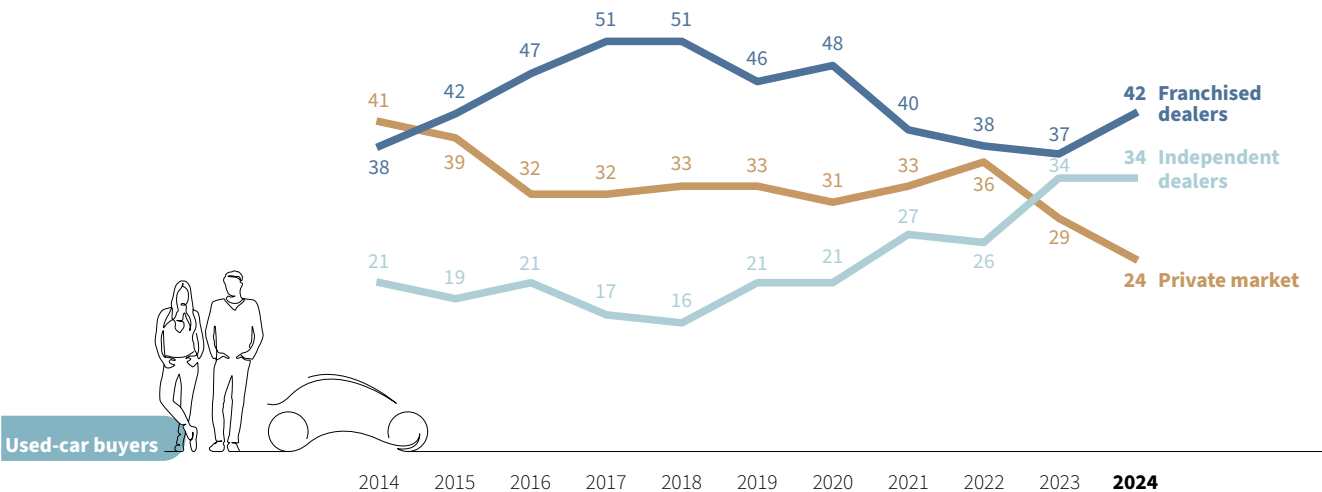
4 Point of purchase

Franchised dealers' market share of used-car sales rose again for the first time in 2024. Although it is still too early to speak of a turnaround, franchised dealers have been able to strengthen their position in the used-car business: after reaching a historic low of 37% last year, as shown very clearly in Fig. P12, this share increased significantly by five percentage points in 2024 (42%). The market declines were due to the lack of young used cars, fewer

P12

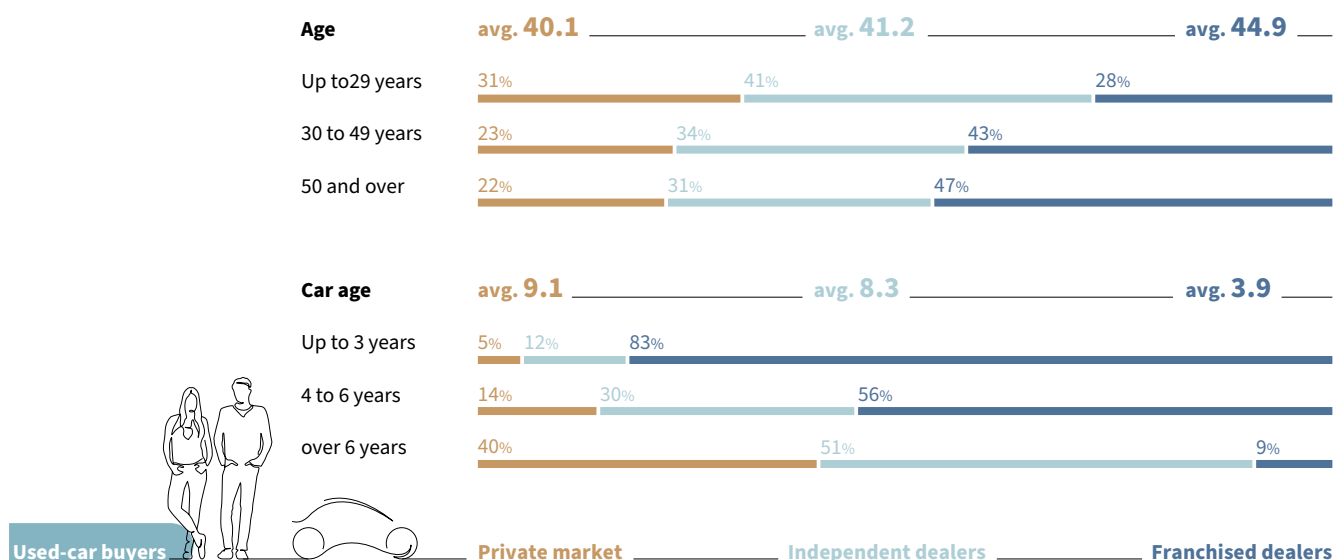
P12 Market shares of used-car sales

Figures in percent



Source: DAT

P13 Point of purchase by buyer age and car age 2024



Source: DAT

transfers of ownership overall and a general reluctance to buy. In recent years, the prices of used cars on the dealer's forecourt have been very high and so too expensive for many customers.

In 2024, franchised dealers once again had sufficient vehicles and, above all, young used vehicles available at more attractive prices. Besides this, in 2024 there was an increase in the rate of trade-ins and sales to a dealer without making another purchase. As a result, the franchised trade asserted itself as the most important point of purchase for private buyers and sellers and was thus able to gain market share.

The private market fell to an all-time low against the franchised and independent dealers at 24%. It lost five percentage points over the previous year. This historically low level illustrates the great reluctance of private individuals to offer their vehicles for sale. In line with this, 77% of them also confirmed that they want to keep their car for longer.

The independent trade remained at the same level as in the previous year with a market share of 34%. Independent dealers also had sufficient used cars in stock again in 2024, which they were able to offer at attractive prices. In general, the vehicles were somewhat older than those at the franchised dealer and therefore attractively priced for many buyers. The long-term trend clearly shows that the

independent trade has poached shares from the private market. This is hardly surprising, because a consumer receives similar purchase prices from dealers with the added security of a statutory warranty.

Purchase points vary by customer and car age

A look at the different points of purchase, as shown in Fig. P13, reveals: in 2024, franchised dealerships were particularly attractive to used-car buyers in the 30 to 49 age group (43%) and the 50+ generation (47%). Younger buyers up to the age of 29, on the other hand, tended to favour independent dealers (41%) and the private market (31%). This is also the reason for the significant difference in the average age of buyers: 44.9 years for franchised dealers and 40.1 years for the private market.

Looking at the average age of cars in relation to the place of purchase, the oldest cars in 2024, at 9.1 years, were traded on the private market. Franchised dealers sold the youngest used cars at just 3.9 years old. Or to put it another way: 83% of all used cars up to three years old were bought from franchised dealers, while only 5% in this age group were bought from the private market. Interesting in this context: more than half of the four- to six-year-old cars were also purchased from franchised dealers, which is an indication that after years of shortages, they once again had an attractive range to offer.

5 Spotlight on the dealer

The survey of used-car buyers for the DAT Report 2025 revealed that personal contact has become more important overall, not only with one’s friends and acquaintances, but also the direct contact with dealers. To guarantee their personal mobility, used-car buyers consider it very

P14 important to get good advice from their dealer. Figure P14 shows how used-car buyers rated their dealers during the purchasing process and what was relevant to them. Overall, independent dealers performed significantly better in 2024 than in the previous year. The figures for almost all statements were higher than those for 2023.

Only the statement “made use of used other services there (workshop/accessories)” dropped by four percentage points to 29%. This decline continues the trend of the two previous years.

The situation is very different at franchised dealers, where the percentage of replies in agreement with this statement rose to 82%, a substantial increase of 13 percentage points over the previous year. Clearly, franchised dealerships sold significantly more additional services. The reason for this is often the wider range of accessories and merchandise items that franchised dealers can offer in their entirety, as full-range suppliers.

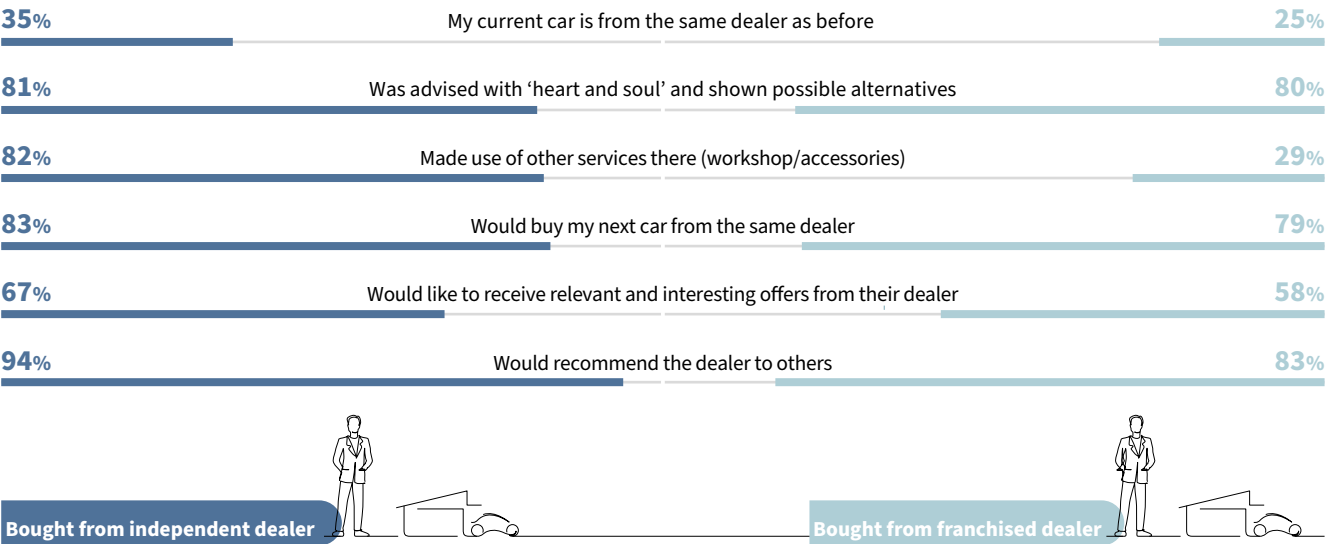
Higher loyalty rate at independent dealers

After falling to 8% in 2023, the proportion of repeat customers at independent dealers rose again significantly by 17 percentage points in 2024, reaching 25%. This is not a record high, but it is much higher than the two previous years. The decline in the previous year has nothing to do with the quality of the independent dealers, but rather with the lack of supply, which could not meet customer demand because there were simply no cars to be had. At 35%, slightly more buyers from franchised dealers also stayed with the same dealer (2023: 32%).

High satisfaction with dealers

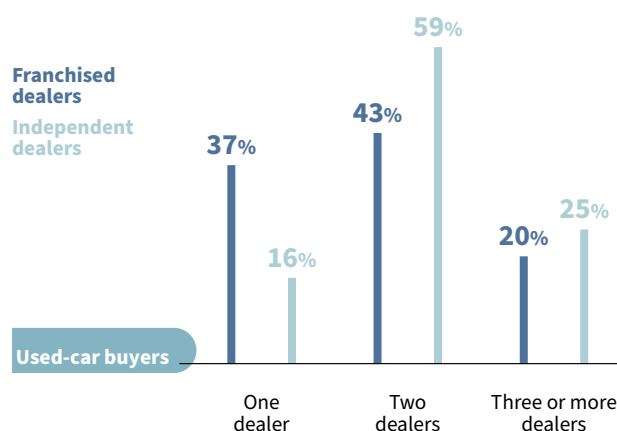
The higher figures for the statements “Would buy my next car from the same dealer” (79%) and “Would recommend the dealer to others” (83%) confirm that satisfaction with independent dealers was generally high, especially when they had a good range of cars on offer. The professionalism of independent dealers has reached a very high level. This can be seen not only in the higher rate of personal recommendations, but also in the growing interest in receiving relevant and interesting offers post-purchase, now at 58% (2023: 48%). Overall, the figures for franchised dealers are slightly higher than for independent dealers:

P14 Verdict of used-car buyers on their dealers 2024



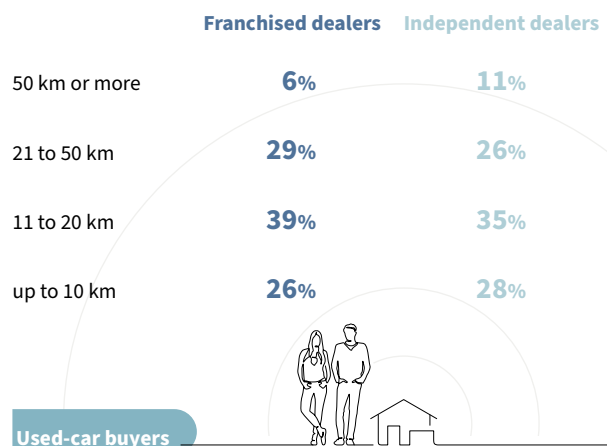
Source: DAT

P15 Number of dealer contacts in car-buying decision process 2024



Source: DAT

P16 Distance from home to dealer 2024



Source: DAT

35% bought their used car from the same franchised dealer as before, and 83% confirmed that they would buy their next car from the same dealer. 94% stated that they would recommend their franchised dealer to others. Although this is one percentage point less than in the previous year, it is still a positive development overall and underscores the high level of satisfaction of used-car buyers with their franchised dealer.

Dealer contacts in the purchasing process

P15 Contact with multiple dealers is almost standard for customers in the purchasing decision process. Figure P15 shows this broken down by franchised and independent dealerships.

The fact that customers once again found a sufficient selection of vehicles at dealerships in 2024 meant that the number of people visiting more than two dealerships fell yet further. In 2023, after a year of shortages, buyers often paid a visit to more than three dealers. This was far less frequently the case in 2024: in the franchised trade, visits to three or more dealers fell substantially from 29% (2023) to currently 20%. Most people visited two dealers – in the franchised trade 43%, five percentage points more than in the previous year. A clear shift from just one dealer contact to two contacts can be observed in the independent trade. This figure rose from 45% to 59%, while only 16% (previous year: 29%) visited just one dealer. Overall, it can be noted that in 2024, two dealer contacts were necessary in most cases to find the desired car.

Distances to franchised or independent dealers converge further

The distances travelled by used-car buyers to purchase a vehicle from a franchised dealer or an independent dealer continued to converge in 2024.


P16 Figure P16 shows that buyers travelled similarly long distances to both franchised dealers and independent dealers, and mostly found what they were looking for within a radius of up to 50 km. The percentage of used-car buyers who bought from an independent dealer within a 10-kilometre radius of their home rose to 28% (2023: 21%). Only 26% (2023: 34%) travelled 21 to 50 km to an independent dealer. In other words, buying from independent dealers has shifted back into the local neighbourhood. Which is not true when buying a used car from a franchised dealer. This involved somewhat longer distances, which probably has something to do with the thinning out of the dealer networks. In 2024, 29% of buyers travelled 21 to 50 km to the franchised dealer, compared to just 17% in 2023.

37%

of buyers of used cars from franchised dealerships had contact with one dealer only

P17 Ranking: reasons for purchase by point of purchase 2024

Used-car buyers



	Franchised dealers	Independent dealers
Option of a test drive	1	5
Attractive range/had the car I wanted	2	4
Good support/advice	3	2
Friendly staff	4	1
Good trade-in offer	5	7
Good finance offer	6	8
Good location/proximity to home	7	3
Good workshop there	8	10
Am a (long-standing) customer there	9	11
Extensive services	10	12
Recommended by friends/family/other	11	5
Positive customer reviews on internet	12	8

Source: DAT

63%
of all used-car buyers
chose their dealer
because of the
friendly staff there

Reasons for the choice of dealer

Used-car buyers had various reasons for choosing the dealer from which they ultimately bought their vehicle. Figure P17 shows which were the most important factors for buyers when choosing their dealer. For the question “What were your main reasons for choosing this dealer, regardless of the price of the car?”, all respondents were asked to rate predefined criteria. The results were converted into rankings to enable comparability between franchised and independent dealers. This revealed clear differences between the choice of a franchised dealer and an independent dealer. The opportunity to take a test drive was the most frequently cited reason by customers of the franchised dealer, followed by the desire for an attractive product range (2nd place). Among independent buyers, test drives also remained among the top five reasons in 2024, but lost some of their relevance and slipped from third (2023) to fifth place. Buyers also expected an attractive range from independent dealers, which ranked fourth as in the previous year.

Good support and friendly staff gained ground

Among the top reasons for choosing a dealer, reasons relating to interpersonal communication and advice are becoming increasingly important. Friendly staff and good support/advice were actually the most important factors for used-car buyers at independent dealerships, occupying the first two places. Both reasons were also ranked in the top five when choosing a franchised dealer, but only came in third and fourth place. Another point that can speak for or against a dealer is a recommendation from friends or family. Customers of independent dealers in particular rated this as much more important (5th place) than in the franchised trade. There, the opinions of the buyer’s private environment played a much more minor role (11th place). It is worth noting that personal recommendations were more relevant for both groups of buyers than positive (anonymous) customer reviews on the internet. In the franchised trade, they came in last on the list in 12th place, while in the independent sector they came in eighth place. There were also differing assessments with regard to the criterion “good location/close to home”. When it came to choosing an independent dealer, this factor came in third place, while buyers from franchised dealers rated this aspect in seventh place. In conclusion, it should be noted that the services offered by the dealer were not particularly relevant to the choice of dealer. This item ended up in tenth and twelfth place respectively. Customers presumably assumed that dealers generally always offer a reliable service that matches the relevant vehicle and therefore did not state this criterion as a separate reason in the survey.

6 Warranty and maintenance contracts

In recent years, the car market was affected by a shortage of vehicles and then by high prices, until finally in 2024 there were enough vehicles available again – albeit at prices that remained high. These shifts also had an impact on the purchase of additional services offering insurance for the used vehicles purchased. Services such as warranty or maintenance contracts are always important customer loyalty tools for dealers. For car buyers, they are a promise of quality or performance that can protect them from high costs. Nevertheless in 2024, just half of all used cars were sold with a warranty, as shown by Fig. P18. In

P18

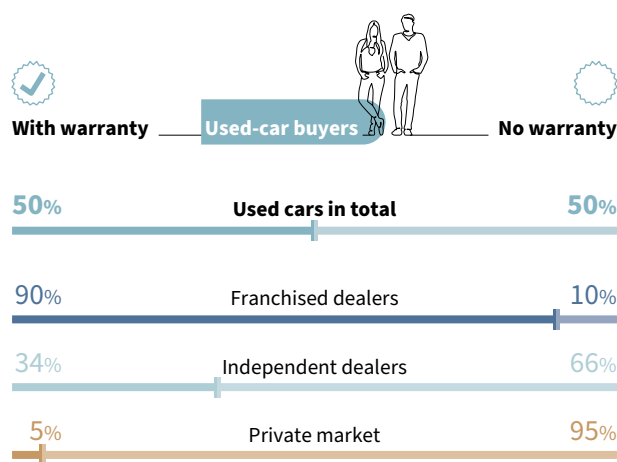
the franchised trade, 90% of vehicles were sold with a warranty, which is an increase of three percentage points over the previous year. This is considerably more than in the independent trade, where the share actually fell in 2024 by a significant 14 percentage points to 34%. It was evidently easier for franchised dealers to sell warranties, and they were often already integrated into attractive packages. Independent dealers appeared to have more difficulty with offering these additional services for a fee. On the private market, only 5% of all used cars were sold with a used-car warranty. This is not surprising owing to the significantly older cars that were purchased there, as only a very small percentage of the used cars traded there were still young enough to have a warranty. A private seller cannot offer an additional guarantee when selling.

Fewer service and maintenance contracts

P19

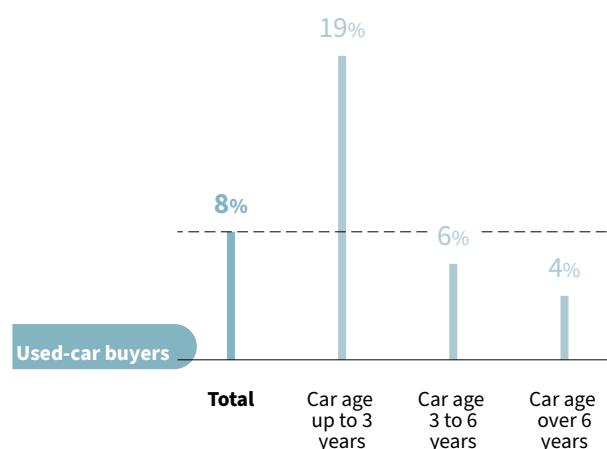
In Fig. P19, a closer look at service and maintenance contracts reveals that only 8% of all used-car buyers purchased such a quality promise in addition to the vehicle. This was substantially less than in the previous year (2023: 14%). There is a particularly significant decline for young used cars up to three years old. From 31% in 2023, the figure fell by twelve percentage points to 19% in 2024. Far fewer service and maintenance contracts were also sold for three- to six-year-old used cars. Only 6% of used-car buyers of these vehicles purchased such a contract, a fall of ten percentage points compared to the previous year. One of the reasons for this was the increased price sensitivity of buyers. Having already invested a lot of money in the purchase of a vehicle, they chose not to incur even more costs for the time being. They tended to trust that nothing would happen and that the car would last, so that an additional service or maintenance contract was not relevant for them.

P18 Used-car warranty on purchase 2024



Source: DAT

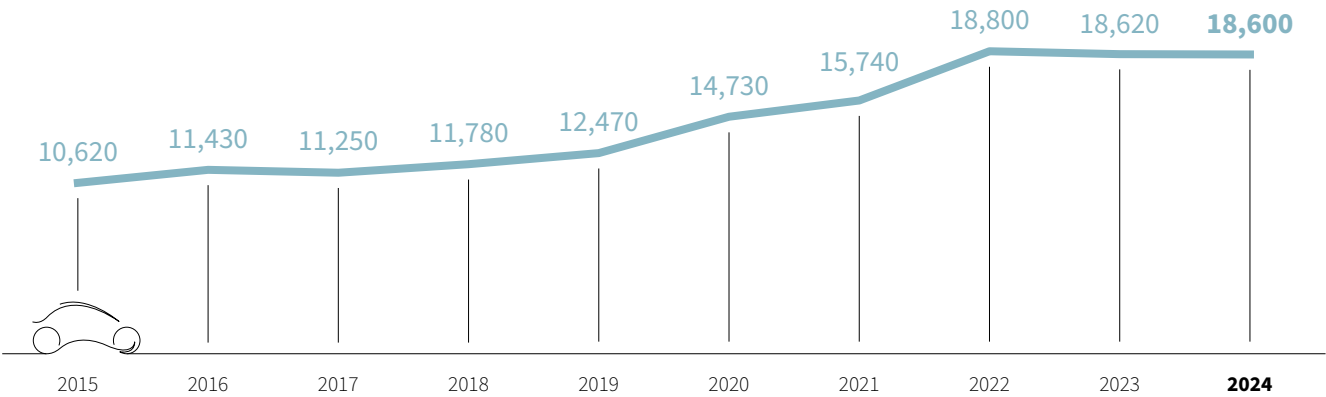
P19 Purchase of service/maintenance contract when buying a used car 2024



Source: DAT

P20 Used-car prices

Average prices in euros



Source: DAT

7 Purchase price

The continuous rise in prices over the past ten years peaked in 2022. The soaring trajectory has plateaued since last year.

P20 Figure P20 shows that the price in 2024 remained at the high level of the two previous years and averaged EUR 18,600. The shortage situation in 2020 and 2021 had fuelled the rise in prices, allowing used cars to be sold at relatively high prices. This price level was maintained, even though sufficient vehicles were once again available on the market. However, the strained general economic situation in 2024 influenced customers’ purchasing behaviour. The reluctance to buy was clearly noticeable. Dealers

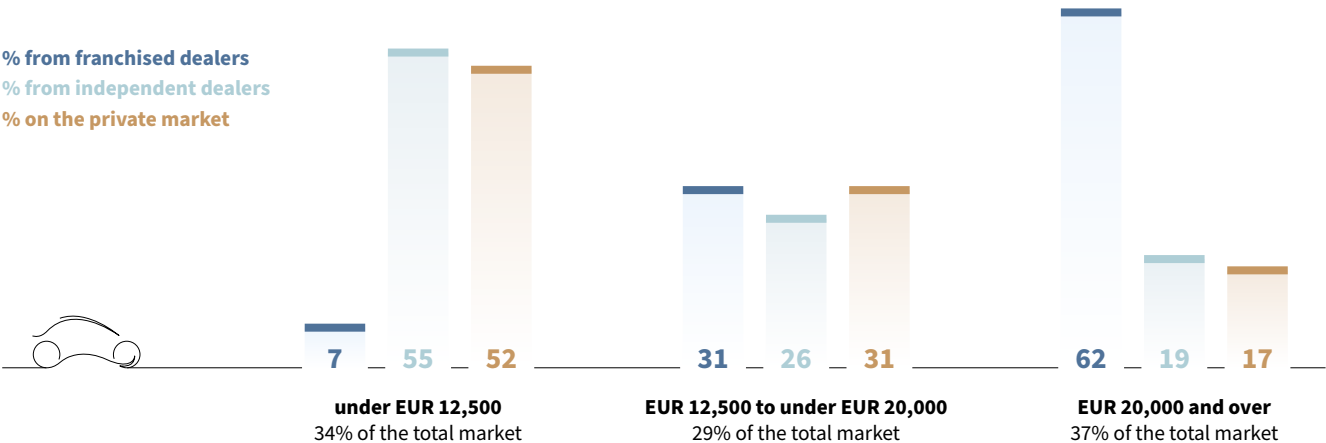
responded with steep price reductions and were forced to grant more discounts.

Independent dealers score points with entry-level vehicles

Because the general price level remained at the previous year’s level, there were only slight shifts within the various purchase price categories, as can be seen in Fig. P21. In the category of used entry-level vehicles under EUR 12,500, the independent trade (55%) and the private market (52%) accounted for the largest shares. In this purchase price category, independent dealers were able to gain as much as twelve percentage points compared

P21

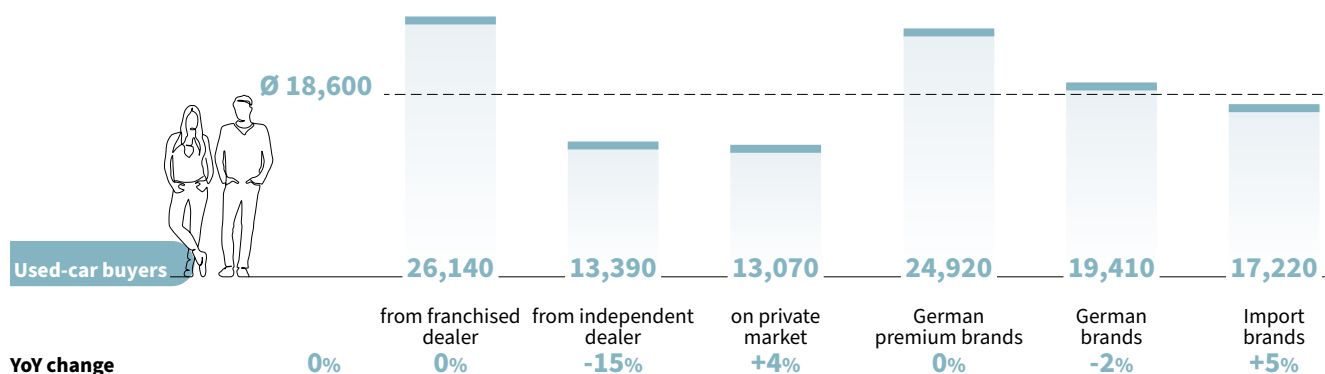
P21 Purchase price categories for used cars 2024



Source: DAT

P22 Used-car prices by point of purchase and brand 2024

Prices in euros



Source: DAT

to the previous year. The shares of the private market and franchised dealers in the entry-level segment fell by a mere three percentage points. The smallest shift was in the mid-price segment from EUR 12,500 to under EUR 20,000. All three points of purchase share this market with around one-third each. In the high-price segment above EUR 20,000, 62% of buyers purchased from franchised dealers. The independent trade lost ten percentage points there and ended up with a share of 19%. Nevertheless, the private market was able to gain three percentage points in this expensive purchase price category, climbing to 17%.

Large price drop in independent trade

P22

Despite the overall stagnating price level for used vehicles, prices shifted depending on the place of purchase and brand. This is illustrated by Fig. P22. On the private market, prices rose slightly by four percentage points. One reason was that very few vehicles were being offered privately in 2023, and they were mostly older cars. As a result, prices on the private market fell quite substantially at the time. Likewise in 2024, there were only small numbers on the private market. The vehicles were similar in age to the previous year, but had a significantly lower mileage. This meant that higher prices could be charged. A used car cost an average of EUR 13,070 on the private market in 2024. The most significant price declines were recorded by independent dealers: prices for used vehicles there fell by 15%. Overall, the vehicles on offer were older than in the previous year. Although there were more cars again, demand was weak, which led to these price reductions. As a result, the average purchase price in the independent trade was EUR 13,390, which is only slightly higher than the vehicles traded on the private market.

In the franchised trade, prices for used cars were almost exactly the same as in the previous year. On average, a used vehicle there cost EUR 26,140 (2023: EUR 26,170). The used cars being offered there were significantly younger and had a lower mileage. Under normal market conditions, they could have been sold for even more, but as there was an oversupply, the dealers had to discount their vehicles. Finally, looking at the purchase prices by brand, used cars from imported brands in particular achieved higher prices. They cost an average EUR 17,220, up 5% on the previous year. By contrast, prices for vehicles of German premium brands and German brands did not change significantly.

15%

lower prices were paid
for used cars purchased
from independent dealers

8 Financing

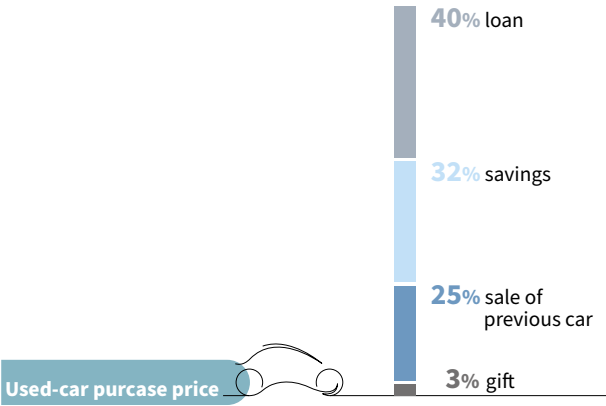
Buyers have various options at their disposal for financing a used car. They can take out a loan come from their own regular bank, from an online provider, or via the dealer. In the latter case, the dealer partners with a manufacturer-owned bank or an independent automotive bank. In the DAT Report, the topic of financing is considered from two different angles. The first involves analysing the constituent components of the purchase price. The second looks at all used cars and determines how many of them were purchased with external finance.

More savings used

In 2024, buyers had four options for raising the purchase price of a used car: loans, savings, gifts and the sale of the previous car. The distribution of these four options has remained relatively stable. As can be seen in Fig. P23, the biggest chunk of the purchase price (40%) was loan-financed. This figure corresponds exactly to that of the previous year. Loans have become increasingly important in recent decades, which is why the purchase of a used car is also dependent on favourable interest rates for loans. The proportion of the purchase price covered by personal savings has increased. While buyers contributed 29% of their own money in 2023, this figure rose to 32% in 2024. This shift of three percentage points was reflected in the proceeds from the sale of the previous car, which fell by three percentage points to 25%. This drop can be

P23

P23 Financing the purchase price 2024



Source: DAT

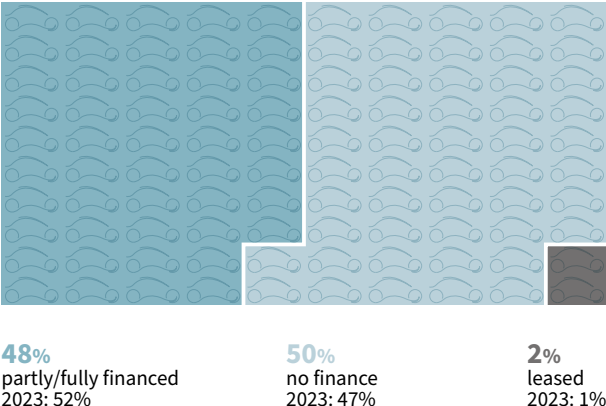
explained by the fact that significantly lower prices were being paid for such vehicles in 2024, which is why sales of the previous car were able to make a smaller contribution. The percentage covered by cash gifts, which had already been at a very low level in recent years, did not change compared with the previous year.

Fewer vehicles financed

Looking at the totality of all used cars and how many of them were paid for at least in part with a loan, we see that slightly fewer used cars were partially or fully financed in this way in 2024 (48%). In the previous year, 52%, or more than half, took advantage of a loan to finance the purchase. On the other hand, as Fig. P24 also shows, used-car buyers drew on their savings more often, as the proportion of those who did not borrow money rose to 50%. This increase may well be due to the fact that the purchase and the financial resources had often been budgeted for some time and could only now be realised. The leasing of used cars still played a fairly negligible role among buyers in 2024, although it did double to 2%.

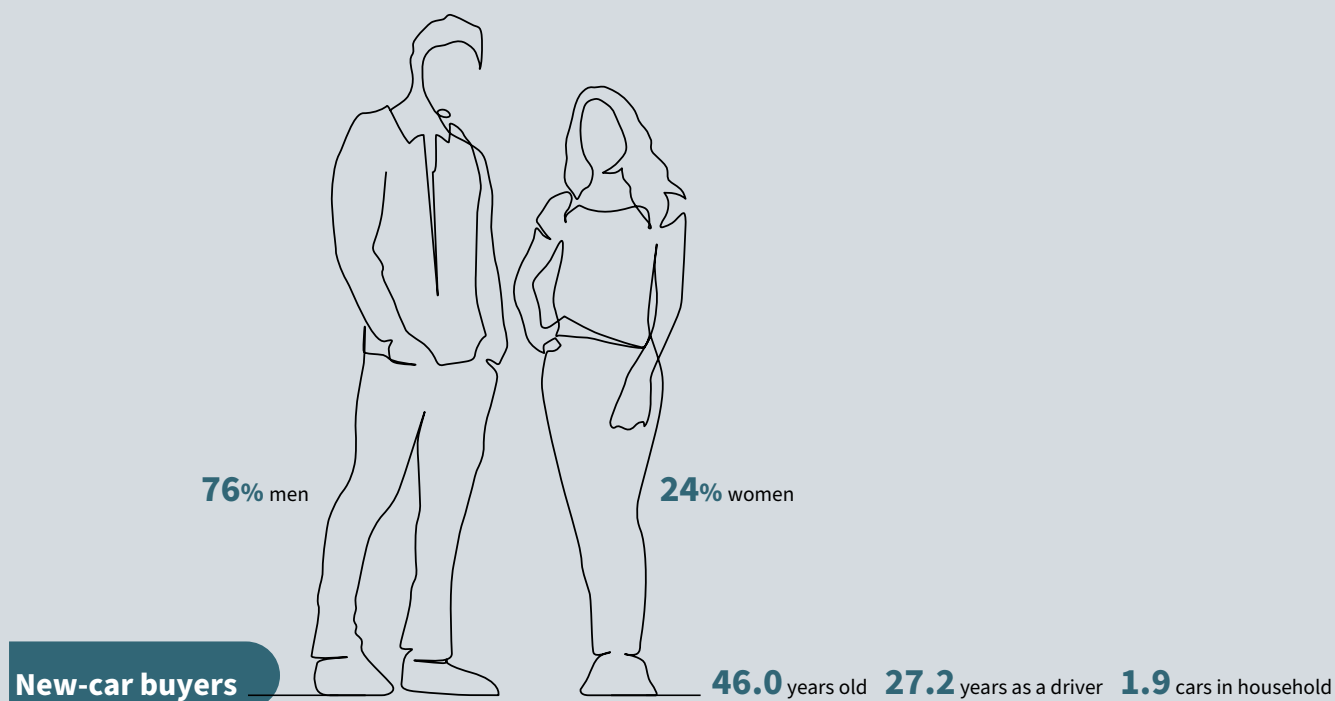
P24

P24 Financing of all used cars 2024



Source: DAT

P25 The average new-car buyer 2024



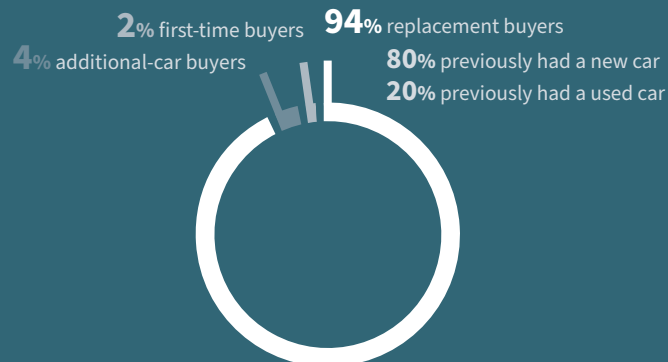
20% considered buying a used car too

54% considered current purchase an absolute necessity

20% are generally not firmly attached to one brand

12% park on public street, have no parking space

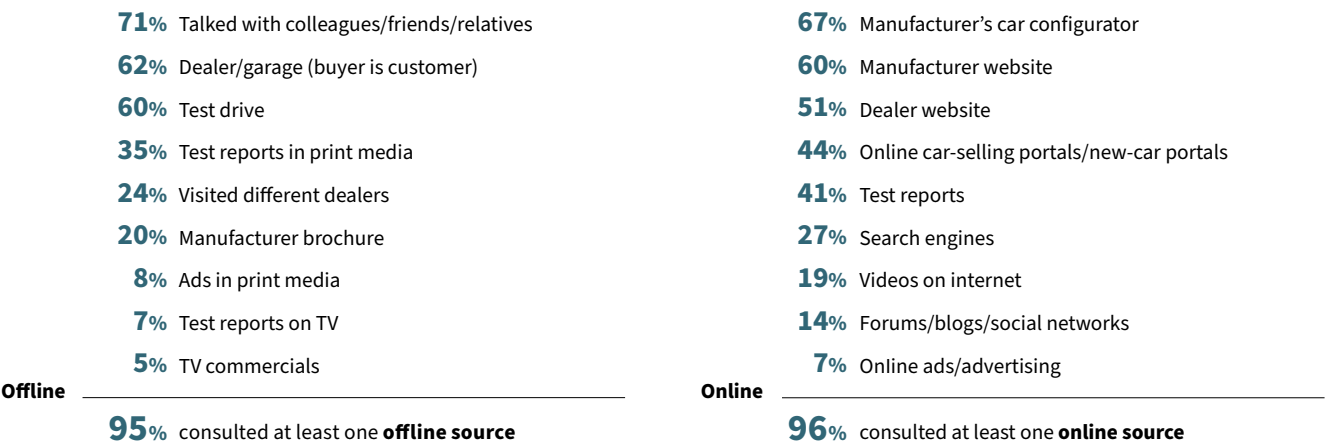
44% bought differently than originally planned



▼
The new-car buyer had a monthly
net household income of **EUR 4,728**
The new-car buyer spent **EUR 43,530** on his car
▲

3.3 New-car purchase

P26 Information sources for new-car buyers 2024



Source: DAT

1 Information behaviour

The purchasing decision process of private new-car buyers involves gathering a great deal of information about vehicle details, prices or additional services offered by dealers. Particularly in times when purchase prices remain high, customers spend a long time carefully weighing up whether they will buy a new car and if so, from whom. The sources of information they use are many and varied. Unlike when buying a used car, new-car buyers used on-line and offline sources almost equally, as Fig. P26 shows.

95% of all new-car buyers consulted at least one offline source, of which the most important one at 71% was the personal conversation with colleagues, acquaintances or relatives. This has become much more important than in the previous year (66%). A trusted dealer or garage likewise gained in importance: with an increase of seven percentage points to 62%, this aspect rose from third to second place. In general, talking to other people to obtain information through personal exchange continued to gain relevance. Among the offline sources of information, test drives (60%, a drop of 5 percentage points) and visits to

multiple dealerships (24%, minus 7 percentage points) are in slight decline. Among online information sources, car-selling platforms and search engines have lost out the most. While the platforms fell from second place and 61% in the previous year to fourth place and just 44%, search engines ceded twelve percentage points and only made it to 27% (previous year: 39%). This underscores the fact that people rely on other people when buying a new car. Their opinion becomes more relevant. On the other hand, the use of vehicle configurators has gained ground (67%, previous year: 61%), as has the manufacturers' website (60%; previous year: 57%). New-car buyers searched for specific information and wanted to know as precisely as possible what model variants are available and what kind of prices are associated with them. They were not interested in gathering a mass of information that required them to first filter out the relevant facts. This is doubtless one of the reasons behind the increasing relevance of test reports. Data and facts from experts were more important to new-car buyers in the purchasing process than statements from influencers in forums and blogs.

P27 Assessment criteria when buying a new car 2024

2 Purchase criteria

In order to assess which criteria are most important to new-car buyers and how they rate them, respondents were asked to assign scores to a total of 15 criteria according to their importance when buying a new car in 2024. The scale in Fig. P27 comprised four levels from 1 'very important' to 4 'unimportant'.

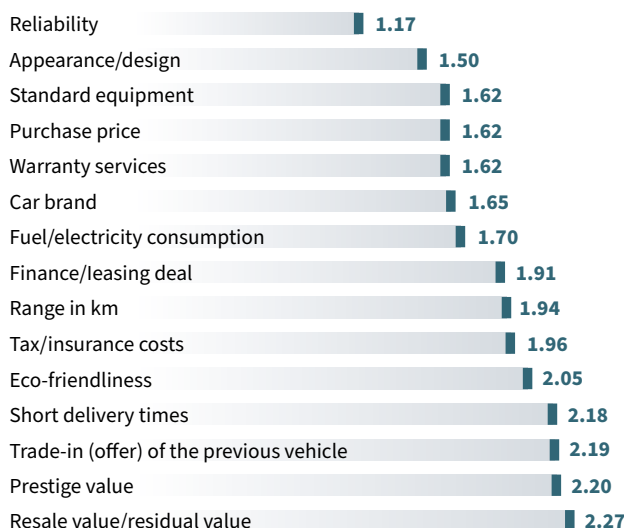
P27

As in previous years, all of the specified criteria were categorised as 'very important' or 'important'. None were assigned a score of 3 or 4. 'Reliability', 'appearance/design' and 'standard equipment' were again given top marks by new-car buyers in 2024 and, as in the previous year, they took the top three places. The criterion 'reliability' in first place was rated even higher than in the previous year with a score of 1.17 (2023: 1.22).

Purchase price gained importance

New-car buyers also rated the purchase price and warranty services as more important than in the previous year. The purchase price rose to fourth place with a score of 1.62 and improved by one place. Once the period of vehicle shortages was over and dealers had enough vehicles again, new-car buyers were able to shop more selectively and pay attention to getting good value for money. You no longer had to buy only what was available or even do without certain features, but there was some choice again. Warranty services have also become much more important for new-car buyers. They likewise climbed two places to fifth with a score of 1.62 (previous year: 1.86). The increased relevance of warranty services is certainly related to the fact that new-car buyers expect reliability above all else. New vehicles with corresponding warranty services promise this security and reliability. Due to the fact that the purchase price and warranty services have risen in the rankings, the brand of the car has dropped two places down into sixth (2023: 4th place). Nevertheless, at 1.65, the actual score for the car brand was also slightly better than in the previous year (2023: 1.73). Seen overall, in fact, it has been getting better and better from year to year. In times of uncertainty, a strong brand still represents a secure value and provides orientation.

Rating scale from 1 (very important) to 4 (unimportant)



New-car buyers

Source: DAT

Increasing role of loans in financing

Besides the purchase price, financing offers and trade-in offers also gained in importance for new-car buyers. The connection is obvious, as prices for new cars remained high. Buyers were very price-sensitive and were looking for the best way to raise the money for a new vehicle. Against the backdrop of the increasing electrification of new cars, the criterion 'range' was on the list for the first time, with a score of 1.94, placing it in the middle of the field. On the other hand, the question asking about connectivity was dropped, as it is now standard in new vehicles and therefore no longer has a big influence on the choice of car.

Overall, all evaluation criteria achieved slightly better scores in 2024. This means that new-car buyers have evidently become somewhat more selective again, which may be linked to the greater supply of vehicles available from dealers.

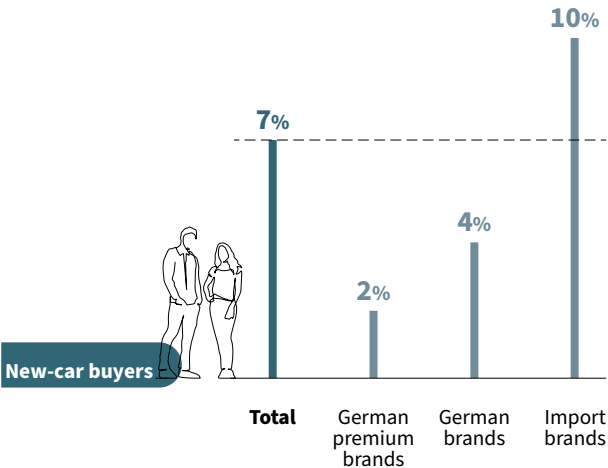
3 Role of the internet

The entire process of buying a new car is unthinkable without the internet. However, the majority still cannot imagine going through the complete vehicle purchase – from the initial research to the final purchase – via a new-car platform. The reluctance level remains high and has even risen further.

Fewer online purchases

The percentage of new-car buyers who purchased their vehicle via an online platform in 2024 was 7%. A year before, this figure had been as high as 10%, and the long-term trend shows that the percentage has fallen for the third year in a row. Figure P28 also illustrates clear differences when broken down by brand group. Even fewer German premium brand cars were purchased online than in the previous year. While their share was still 5% in the previous year, it fell to 2% in 2024. The desire for custom configuration and the associated personal visit to the dealer is most pronounced in this brand group. The proportion of all German brands purchased via a new-car platform was 4%, four percentage points below the previous year's figure. No less than 10% of imported brands were purchased online (2023: 12%), although this figure has also fallen. The up-to-29 age bracket are more open to an online-only car-buying process: of these, 15% have made an online purchase.

P28 New-car purchasing process 2024: purchase made via new-car platform



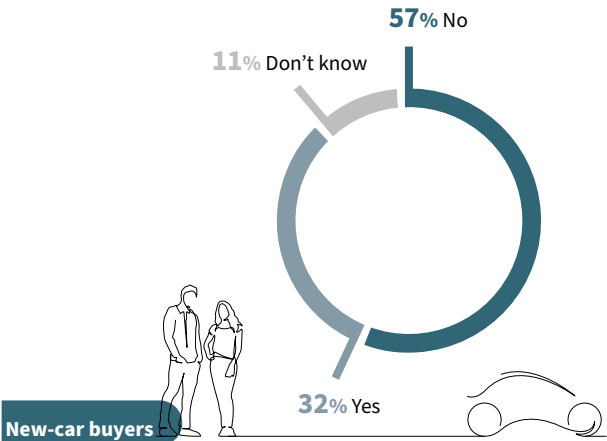
Source: DAT

Generally speaking, the results lead us to conclude that vehicle purchases are not exclusively dependent on price, but that advice and support are becoming increasingly relevant in times of various uncertainties. One reason for the greater need for advice might be the fact that vehicles are becoming increasingly complex in terms of their drive types and assistance systems. In addition, there were enough cheap and discounted new cars available from bricks-and-mortar dealers, which is why new-car buyers did not have to use an online platform.

General attitude towards online purchasing slightly positive

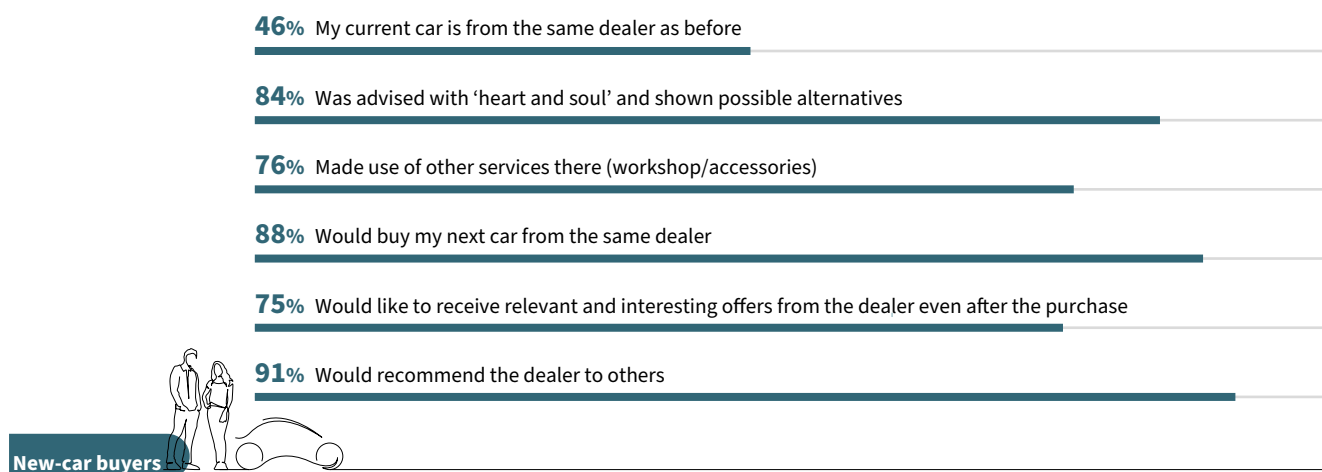
Although online purchases were actually rarely made in 2024, the general willingness to do so is steadily rising, based on the respondents' declaration of intent. Compared to the previous year, the proportion of new-car buyers who would be willing to complete the entire purchase process online has risen very slightly from 30% to 32%. Correspondingly, the proportion of those who would not (yet) be prepared to do so has fallen to 57%, as shown in Fig. P29 (2023: 62%). 11% of new-car buyers were still undecided (2023: 8%). It is interesting to take a closer look at the individual age groups: the greatest openness to buying a new-car online was among 30- to 49-year-olds. Of these, 37% could imagine a purchasing process that takes place entirely online. As in the previous year, the openness of those aged 29 and under (29%) and the 50+ generation (25%) was nowhere near as high.

P29 Openness to online-only new-car purchase (from initial research to purchase) 2024



Source: DAT

P30 New-car buyer's verdict on his dealer 2024



Source: DAT

4 Spotlight on the dealer

In 2024, the dealerships were able to further boost their role as an important point of contact in the customer journey. In a year in which sufficient vehicles were available again – albeit still at high prices – the dealerships gained relevance and prestige. They were seen as extremely important in order to fulfil the mobility wishes of prospective buyers. Key aspects, such as the strength of the relationship between new-car buyers and their car dealers, are illustrated in Fig. P30. The percentage of new-car buyers who bought their car from the same dealer as last time rose by eleven percentage points to 46%. In this context, the proportion of those who would buy from the same dealer again has also developed very positively, rising to 88% (previous year: 80%). The high score of 91% for the statement “would recommend the dealer to others” (2023: 87%) also confirms how important the car dealer has become in the new-car buying process.

P30

46%
of new-car buyers bought
their car from the same
dealer as last time

Increasing popularity of dealers

Overall, all scores in the survey for the DAT Report 2025 increased, which underscores what a good service the dealers are providing. The statement “Advised me with ‘heart and soul’” achieved a very high figure of 84% (previous year: 83%), which speaks for the quality of advice provided by the car dealers. The very high personal recommendation rate also indicates a high level of satisfaction with the dealers. New-car buyers felt that they received good advice from ‘their dealer’ and so didn’t need to talk to any other dealers.

Sale of additional services growing

There is great potential for dealers in the sale of additional services. At 76% (previous year 72%), slightly more new-car buyers than in the previous year stated that they had taken advantage of additional services (workshop/accessories) at the dealership. In addition, three-quarters of all new-car buyers (75%) also wanted to receive relevant and interesting offers from their dealer after the purchase. This is a sign that they intend to remain loyal to the dealer for the time being. This will be of great relevance for automotive companies when new-car buyers become workshop customers. In 2024, they were rarely proactively offered possible additional services in the area of accessories or workshop services (see p. 75).

Two dealer visits on average

The number of dealer contacts in the purchasing decision process has shifted since 2021. In times of shortages, new-car buyers drove to multiple dealerships less often than in 2024. In 2021, 55% of new-car buyers visited just one dealer, while 31% travelled to two dealerships, as can be seen in Figure P31. They bought whatever was available. In the midst of Covid and various lockdowns, social distancing made visits to the dealer more difficult. In 2024, the general purchasing situation was back to normal again: vehicles were available and there was plenty of choice. So it was once again usual for new-car buyers to obtain information from different dealers. The percentage of new-car buyers who only visited one dealer fell to 48%. On the other hand, the proportion of those who visited two dealers rose by six percentage points in 2024 to 37%. There was a very slight rise, from 14 to 15%, in new-car buyers who visited three or more dealerships. The choice of available vehicles and the offers were once again good enough at all dealers, regardless of the brand, so that a visit to an average of two dealerships was sufficient.

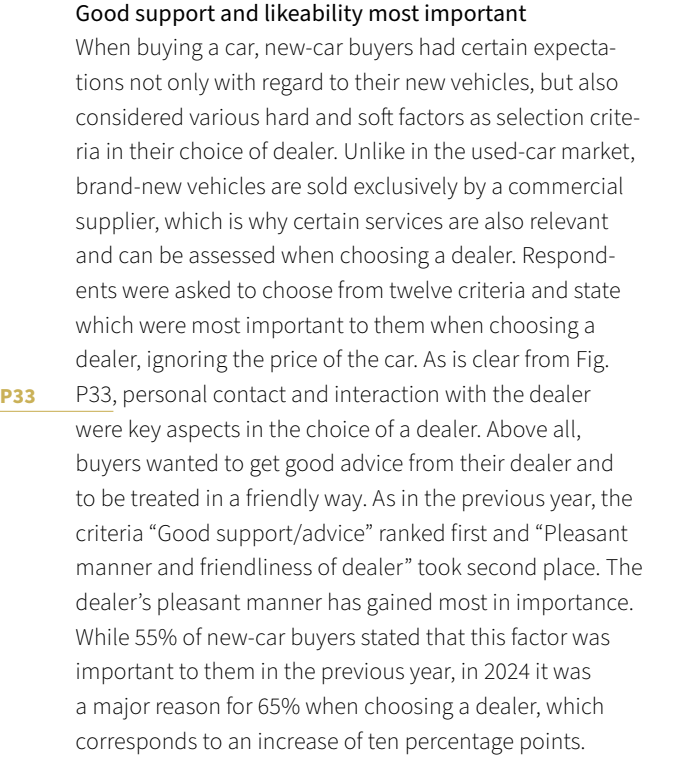
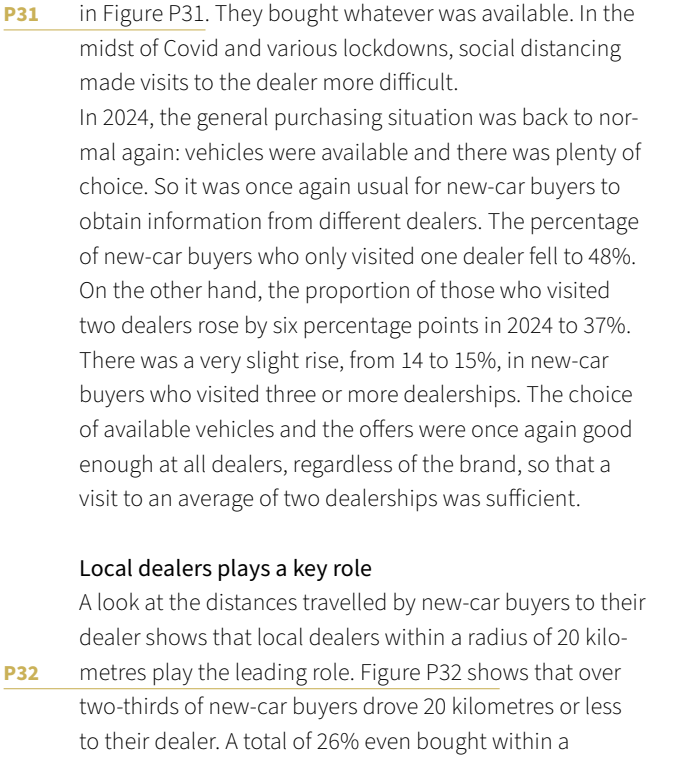
Local dealers plays a key role

A look at the distances travelled by new-car buyers to their dealer shows that local dealers within a radius of 20 kilometres play the leading role. Figure P32 shows that over two-thirds of new-car buyers drove 20 kilometres or less to their dealer. A total of 26% even bought within a

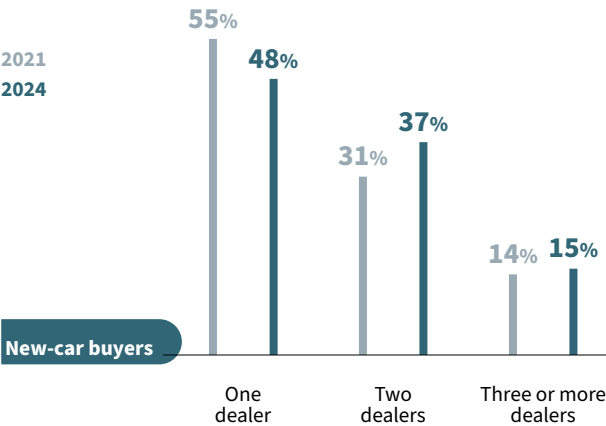
radius of just 10 kilometres. Clearly, buying from one's local dealer has gained in importance. In 2024, it didn't require long journeys to get one's desired vehicle. The numbers in the illustration also show that just 7%, significantly fewer than in 2021, drove 50 kilometres or more.

Good support and likeability most important

When buying a car, new-car buyers had certain expectations not only with regard to their new vehicles, but also considered various hard and soft factors as selection criteria in their choice of dealer. Unlike in the used-car market, brand-new vehicles are sold exclusively by a commercial supplier, which is why certain services are also relevant and can be assessed when choosing a dealer. Respondents were asked to choose from twelve criteria and state which were most important to them when choosing a dealer, ignoring the price of the car. As is clear from Fig. P33, personal contact and interaction with the dealer were key aspects in the choice of a dealer. Above all, buyers wanted to get good advice from their dealer and to be treated in a friendly way. As in the previous year, the criteria "Good support/advice" ranked first and "Pleasant manner and friendliness of dealer" took second place. The dealer's pleasant manner has gained most in importance. While 55% of new-car buyers stated that this factor was important to them in the previous year, in 2024 it was a major reason for 65% when choosing a dealer, which corresponds to an increase of ten percentage points.

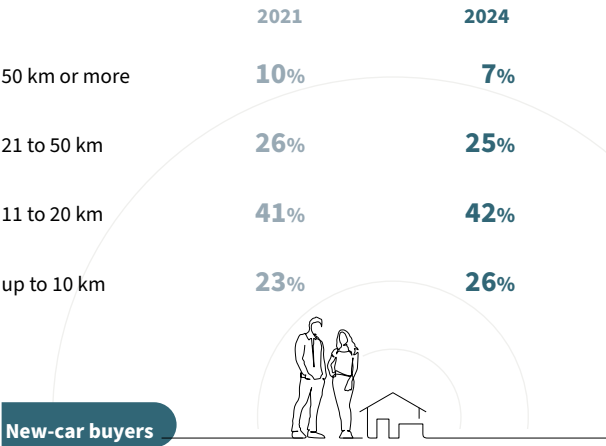


P31 Number of dealer contacts in the car-buying decision process



Source: DAT

P32 Distance from home to the dealer



Source: DAT

P33 Ranking: reasons for choice of dealer 2024

The results clearly show that the human component is more decisive in the choice of the right car dealer than hard factors such as location, financing offers or the product range.

Test drive remains highly relevant

The chance to experience their dream car on a pre-purchase test drive is still one of the most important offline sources of information for new-car buyers in 2024. Which is why it also scores very highly as a criterion in the choice of dealer. As in the previous year, it ranks third in the selection criteria for a dealer. Its importance is no doubt also due to the fact that it is the only step in the purchasing process that cannot be carried out online. Over the years, new-car buyers have apparently developed the expectation that a dealer must offer the option of a test drive.

Financing offers and services are important

As in the previous year, a good trade-in (4th) and financing offer (5th) were important reasons why customers chose their dealer. In times of high prices, this was particularly important to new-car buyers. A good financing offer has become even more significant than in the previous year and has risen one place into fifth. An analysis of all new-car buyers shows that an attractive financing offer was important to 45%. In the previous year, this figure was 37%, nine percentage points lower than in 2024. Prospective buyers evidently paid particular attention to this. Comprehensive services have also become much more important as a reason for choosing a dealer. While they were still in 10th place in 2023, they have climbed to 7th place this year. For 38% of new-car buyers, this factor was important when choosing a dealer, compared to only 23% in 2023. It is worth taking a look at the purchase criteria here, as reliability is the top criterion. This is only logical, because in order to maintain this reliability, there has to be a workshop that can guarantee this. An attractive product range was less relevant to the choice of dealer,



New-car buyers	Total	Regular customer there
Good support/advice	1	1
Pleasant manner, friendliness of dealer	2	2
Option of a test drive	3	5
Good trade-in offer	4	9
Good finance offer	5	8
Good location/proximity to home	6	6
Extensive services	7	7
Good workshop there	8	4
Attractive range/had the car I wanted	9	10
Am a (long-standing) customer there	10	3
Recommended by relatives/friends	11	11
Positive customer reviews on internet	12	12

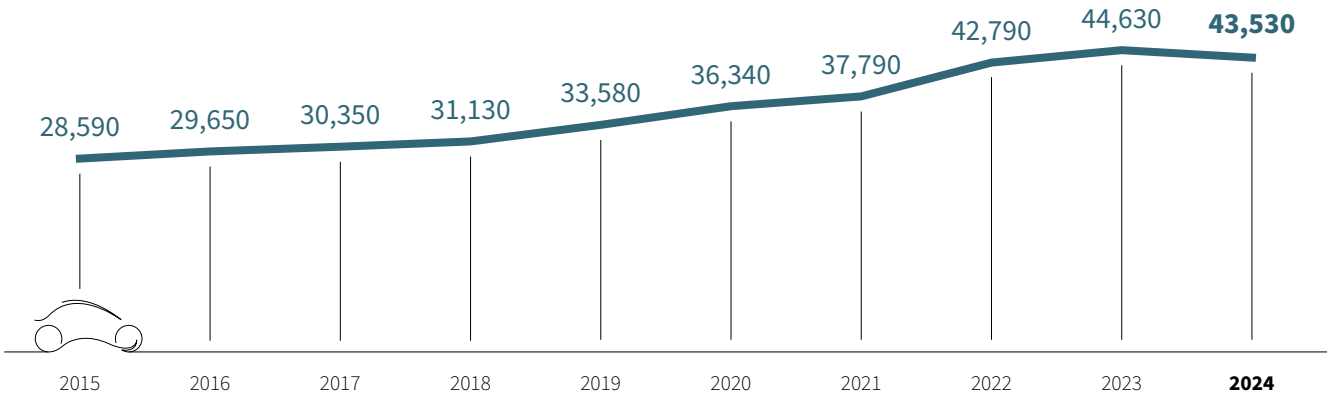
Source: DAT

presumably because there were enough vehicles in stock everywhere, and recommendations from friends and acquaintances and reviews on the internet also played a lesser role.

Dealer loyalty important, but volatile

The statements on the selection criteria for regular customers are interesting. Good support (1st) and friendliness (2nd) were also the most important criteria for them. Maintaining long-term dealer loyalty is also highly relevant for them (3rd place), although the percentage share has fallen from 75% last year to 67% this year. This means that long-standing customers may be prepared to switch to a new dealer if they are offered an attractive product and the dealer appears competent. However, the presence of a good workshop is also important for regular customers. This is as ever a decisive reason for remaining loyal to the current dealer.

P34 New-car prices
Average prices in euros



Source: DAT

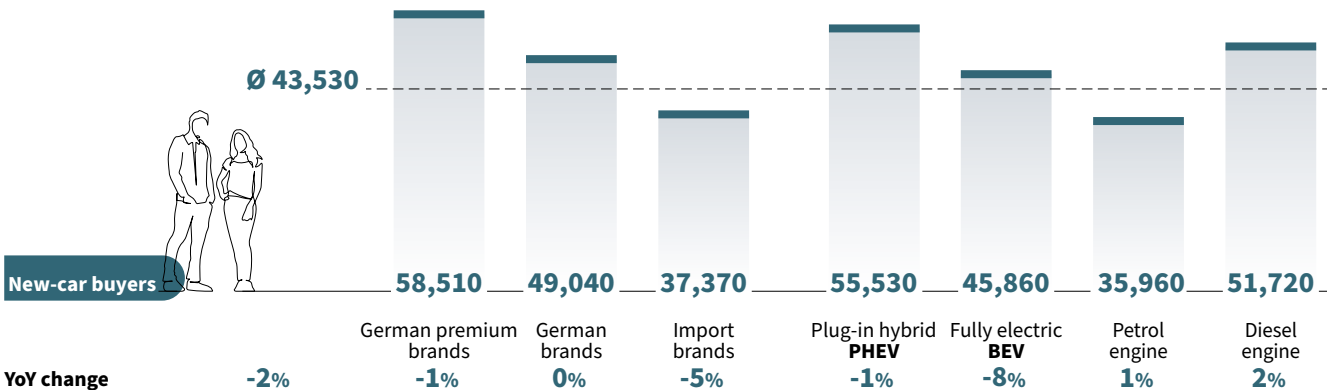
5 Purchase price

New-car prices have risen steadily since data collection for the DAT Report began. In the previous three years in particular, the curve displayed a definite upward trend, partly due to multiple shortages and the lack of vehicles. In 2024, prices have now fallen slightly for the first time. The time of shortages was over and there were enough vehicles available from dealerships again, many in stock. In fact, no less than 42% of all new cars sold were from stock. The fear of overcapacity was another reason why prices did not rise further. The end of the subsidies for electric vehicles also led to many manufacturers giving discounts to make up for the loss of the bonus. As can be seen in

P34 Fig. P34, a new-car buyer paid an average of EUR 43,530

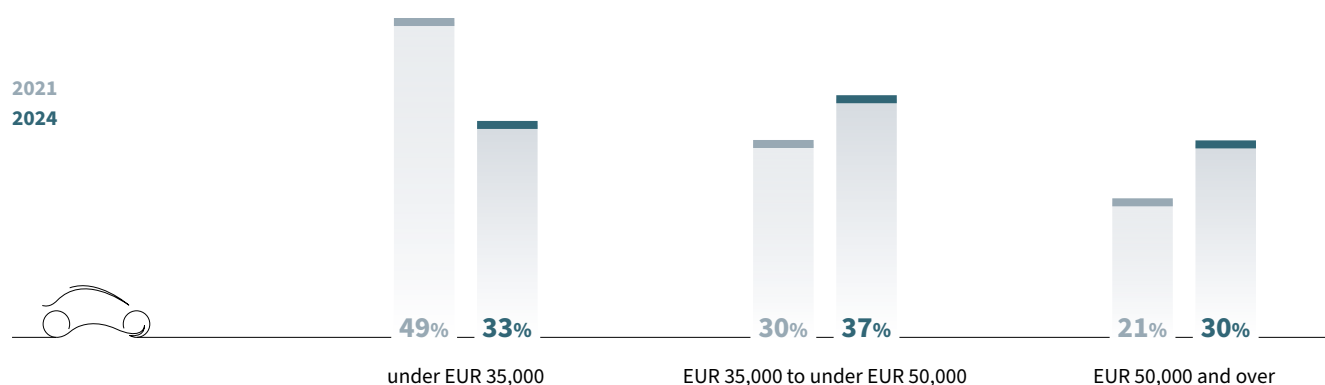
for their vehicle, 3% or EUR 1,100 less than in the previous year. The new-car prices shown are the transaction prices that were actually paid at the time of purchase. They are not the manufacturer's recommended retail prices or new-vehicle list prices. Any discounts received are also included in the prices quoted. Figure P35 shows the decline in new-car prices broken down by subgroups such as brands and drive types. At 5%, the fall in prices is most noticeable in the import brands. While petrol cars have generally become slightly more expensive, the price of BEVs has fallen by 8%. This has brought the prices of BEVs and petrol cars closer together. In 2023, the difference was still EUR 15,000; in 2024, it fell to EUR 10,000. However, there is still a long way to go before price parity is reached.

P35 New-car prices by subgroup in 2024
Prices in euros



Source: DAT

P36 Purchase price categories for new cars



Source: DAT

More vehicles in the mid- and high-price segments

When looking at the different purchase price categories, it becomes clear that there were significant shifts in the purchase price categories when comparing 2021 with the current year 2024. In 2024, only 33% of all new cars cost less than €35,000, compared to 49% in 2021. From Fig. P36, it is also evident that the mid-price range with vehicles between EUR 35,000 and EUR 50,000 has grown significantly. The same applies to high-priced vehicles costing EUR 50,000 and more. One reason for this is that the range of cars in the mid-price segment between EUR 35,000 and EUR 50,000 has expanded. This also includes a good number of BEVs.

P36

Improved equipment level

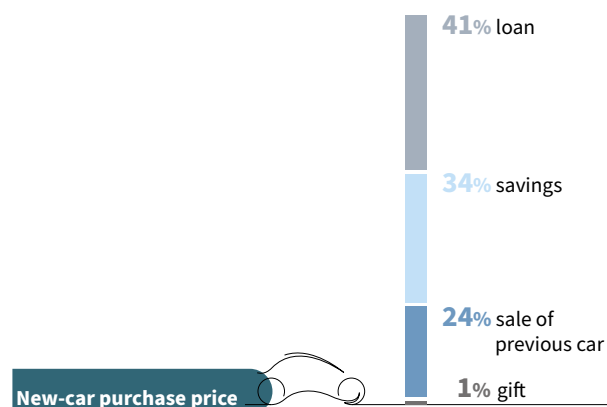
In the price bracket starting at €50,000, there are numerous PHEVs, whose market share of new cars has risen from 21% in 2021 to 30% in 2024. In addition, new cars were generally delivered with a very high equipment level in 2024. This is because the EU General Safety Regulation II came into force on 7 July 2024, which prescribes a series of permanently installed assistance systems for manufacturers. Part of the cost of these complex electronic systems was passed on to customers by the manufacturers.

6 Financing

The year 2024 was characterised by a difficult overall economic situation in which low interest rates or favourable leasing rates were hard to find. Despite the abundant supply of vehicles again in 2024, purchase prices were still so high that many buyers had to borrow money from the bank. Figure P37 depicts the individual components of the purchase price in 2024. Generally speaking, a shift in the price makeup can be observed: the credit rate rose from the previous year's 38% to 41%. At 34%, slightly more personal savings were also used than in the year before (2023: 32%). The sale of the previous car contributed just 24% to the financing of the purchase price, as the market situation meant that proceeds from the sale of the

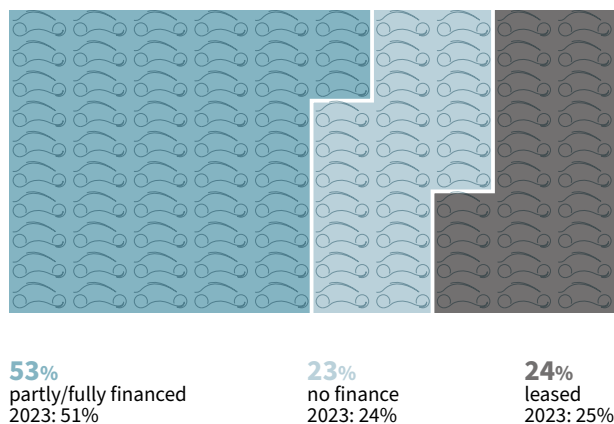
P37

P37 Financing the purchase price 2024



Source: DAT

P38 Financing of all new cars 2024



Source: DAT

previous car or the trade-in figure were no longer as high as in previous years. As in the past few years, gifts played a negligible role, accounting for only 1% of the financing of the purchase price of a new car.

It is also interesting to take a brief look at which bank provided the money for the purchase price. The results of the survey showed that 57% of new-car buyers financed their vehicle through their dealer.

Financing rate increased

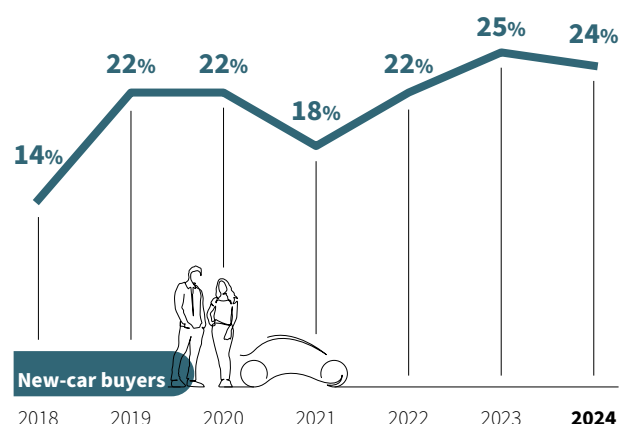
Looking at the total volume of all new cars, it is clear that the majority of all new-car buyers in 2024 had financed their vehicle with a loan in full or in part. This changed only slightly over the previous year, as can be seen in Fig. P38. The share of partially or fully loan-financed new cars

P38 The share of partially or fully loan-financed new cars rose by two percentage points over the previous year to 53%. The survey data shows that the share of partially loan-financed new cars has increased most. While 37% of vehicles were partially financed with a loan in 2023, this figure rose to 44% in 2024. This compares with 9% of new cars that are fully financed. The leasing rate fell by one percentage point to 24%. The proportion of vehicles that were neither financed nor leased also fell to 23% (previous year: 24%). This means that almost a quarter of all new cars are still not financed with a loan.

Private leasing still cautious

P39 As Fig. P39 shows, private leasing is developing fairly cautiously and even declined slightly in 2024. There was an expectation that the private leasing rate would grow more strongly. This was based on the increasing electrification

P39 Private leasing when buying new car



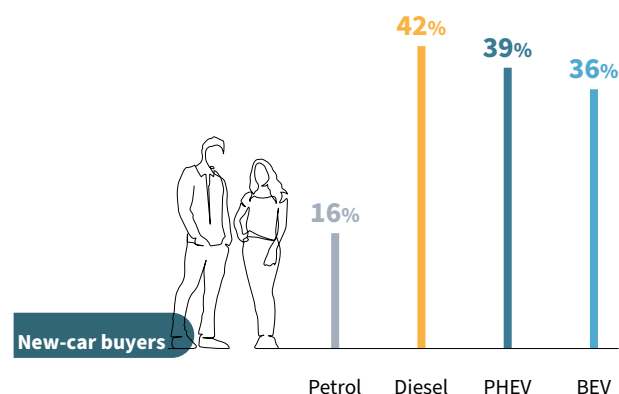
Source: DAT

of cars, which were often sold to consumers with leasing contracts due to the fear of a supposed loss of value. However, new private registrations of BEVs in the first year without government incentives fell well short of manufacturers' and importers' expectations.

If we take a look at the share of private leasing by drive type, as shown in Fig. P40, it becomes clear that only 16% of petrol vehicles were leased in 2024. At 42%, diesel vehicles had the highest share, ahead of PHEVs (39%) and BEVs (36%). The general reluctance to buy EVs, which still prevailed in 2024, probably had an influence on the figures.

P40 Share of private leasing by drive type 2024

P40 Share of private leasing by drive type 2024



Source: DAT

7 Add-on services

In 2024, many people still saw their car as indispensable. Despite high prices, the importance of the car has not diminished, which is why affordability, value retention and care have remained essential issues. Owning a reliable vehicle was once again the most important purchase criterion for new-car buyers. This makes the additional services offered by dealers, such as warranty, service, insurance or financing, very important when buying a new car. Not only are they important for new-car buyers, they also harbour considerable sales potential for dealers. No less than 76% of all new-car buyers stated that they had availed themselves of additional services (workshop/ accessories) at the dealership and 75% would also like to receive further relevant and interesting offers post-purchase (see p. 53 Fig. P30).

Given this interest, there are many good reasons why it makes sense and is in the interest of both consumers and dealers to discuss additional services. Such measures also strengthen the bond between the customer and the dealership or workshop. In increasingly complex times, customers appreciate this and see it as fundamental and valuable.

Loan financing continues to grow

P41 Figure P41 portrays the trend in the most important additional services over the past four years. As it shows, new-car buyers in 2024 were much more likely to take advantage of dealer financing than in the previous year (from 50% to 57%). This effect can certainly be explained by the still high prices of new cars. Of all the additional services listed, the financing is the only one where the percentage of takers has risen. By contrast, the percentages of warranty, insurance and service and maintenance contracts all fell.

Often, however, this has nothing to do with poor performance on the part of the dealer or salesperson; instead, many manufacturers now offer comprehensive service and warranty packages that are included in the vehicle price. This has rendered service contracts much less important. Their

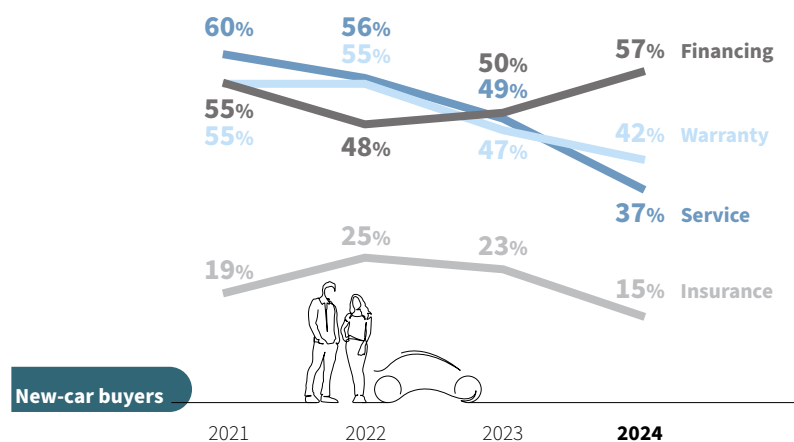
share has fallen by twelve percentage points from 49% in 2023 to 37% in 2024. The pioneers of full-service packages were Asian manufacturers, who integrated complete packages with a long service life into their new-car prices very early on. When leasing a vehicle, the consumer often automatically takes out a full-service leasing contract. All services are automatically included and no longer need to be purchased separately.

Warranty extensions less important

The decline in warranties to 42% (2023: 47%) is due to the fact that new cars are often sold with long-term warranties of up to ten years. This makes it no longer necessary to conclude additional warranty contracts.

As far as the sale of insurance policies is concerned, in 2024 their share slumped to 15% for the second year in a row (2022: 25%). Specially trained and qualified staff are crucial to the successful sale of such services. It is often particularly difficult when it comes to insurance benefits, for dealers to make suitable offers and set themselves apart from other insurance providers.

P41 Purchased additional services with dealers



Source: DAT



Car owner as a garage customer

**Servicing, repairs and
communication behaviour**

4.1 General overview

The garage with its workshop plays an essential role in maintaining the consumer's individual mobility, whether their vehicle is powered by a combustion engine or an electric motor. To ensure they remain road-safe, EVs also need new brakes from time to time, and they too have operating fluids that need replacing and components that need checking.

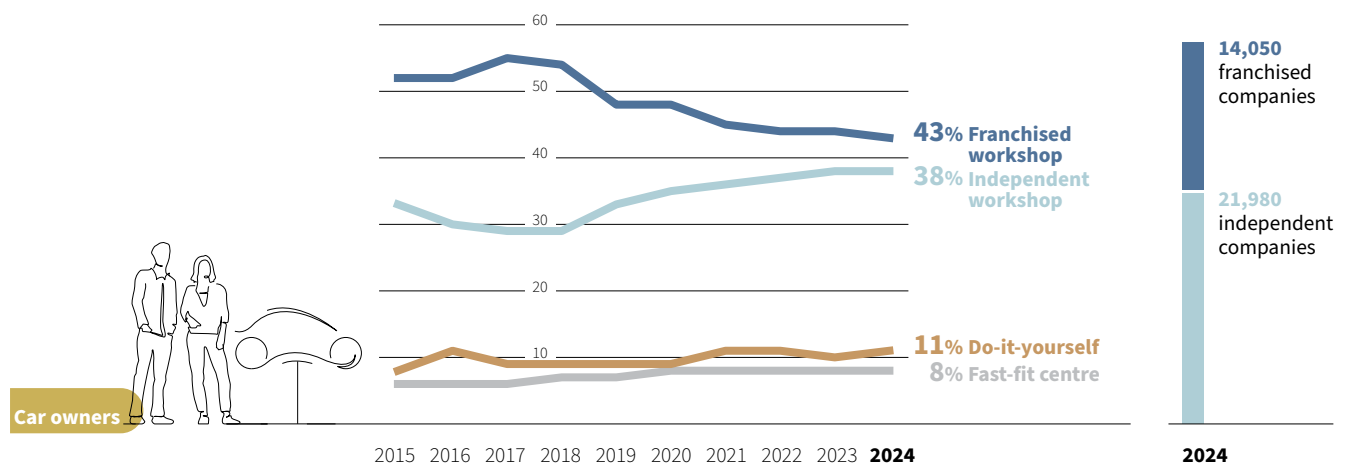
If you look at which workshops carried out the most work, the picture remains constant compared to the previous year, as depicted in Fig. W1. When having work done on their car, consumers most frequently chose franchised garages (43%). Seen over a longer period of time, it is striking that their market share was still as high as 55% in 2017. The decline reflects the decreasing number of workshops tied to a specific brand. Independent garages follow at some distance, at 38%. Although this is the same level as the previous year, they have actually gained more than ten percentage points since 2019. Fast-fit centres also held their previous year's level with a market share of 8%. In part this is because manufacturers and importers have further thinned out their own garage networks, but on the other hand the number of independent workshops has continued to rise over the years. To take this development

into account, we have classified the fast-fit centres in the same category as independent workshops and refer to them as 'independent companies' in the DAT Report. The do-it-yourself share rose slightly to 11% in 2024. This is astonishing in view of the increasing complexity of vehicles. This development is being fuelled above all by complete service packages, which are now available for almost any vehicle for little money at the click of a mouse, or the plethora of online videos that explain every step of the repair process in minute detail.

Garages and their organisational structure

The German Federation for Motor Trades and Repairs (ZDK) is the umbrella organisation for all garages and dealerships. In 2024, 36,030 automotive companies (with an annual turnover of EUR 100,000 or more) belonged to one of the 235 automotive guilds. These in turn are organised in 14 regional associations and are thus affiliated to the ZDK. The individual companies are spread over 14,050 locations (70 fewer than 2023) for franchised companies and 21,980 locations (70 fewer than 2023) for independent companies.

W1 Choice of provider for all workshop work/number of workshops



4.2 Servicing

Servicing work done on the car – i.e. full service, interim service and other kinds of service – has gained in importance over the past two years. Adding up all servicing work performed and averaging it out per car, we get a figure of 1.03 for 2024. As Fig. W2 shows, car owners commissioned or carried out this work almost as frequently as they did during the Covid years (2020: 1.05). Back then, the main motivation was the desire to have a car that would keep running reliably and permit contact-free mobility. Last year’s similarly high figures, on the other hand, stemmed more from the need to be able to use and keep the existing car as long and trouble-free as possible in economically uncertain times. The widespread uncertainties caused by the ramp-up of electric mobility are also causing many car owners to delay switching to another car. Instead, they keep their existing car fit for longer. This postponing behaviour is also evident in the consistently high capacity utilisation rate of garages and the increasing age of the vehicle fleet: according to the DAT Report 2025, the average car age was 9.5 years (0.3 years more than the previous year).

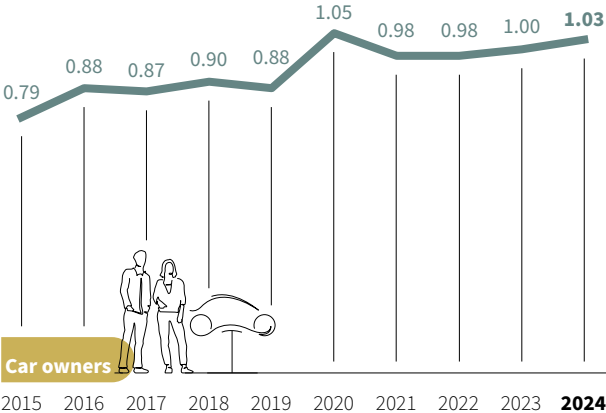
W2

Servicing costs vary according to car age

If we analyse the costs incurred for servicing work, the average price was EUR 389 (gross), EUR 32 higher than in the previous year. As can be seen in Fig. W3, there are significant cost differences depending on the age of the car. In the first three years of a car’s life, servicing costs (0.78) appear to be low at EUR 282. Compared to the previous year, however, these costs have risen sharply (+14%). In addition to the increased complexity of vehicle technology, this could also be due to the regular software updates. The highest costs were incurred by cars between three and six years old: EUR 460 was paid for 1.18 servicing appointments. Similar to the overall average of 1.03 servicing visits and EUR 389, the figure for cars older than six years was also 1.03 servicing visits (EUR 385). Overall, however, it is important to note that the average figure of EUR 389 relates to all cars, including those on which no work was done. If we consider only the subgroup of car owners who had servicing work done, their average costs amount to EUR 527 (gross).

W3

W2 Servicing frequency
Number per car/year



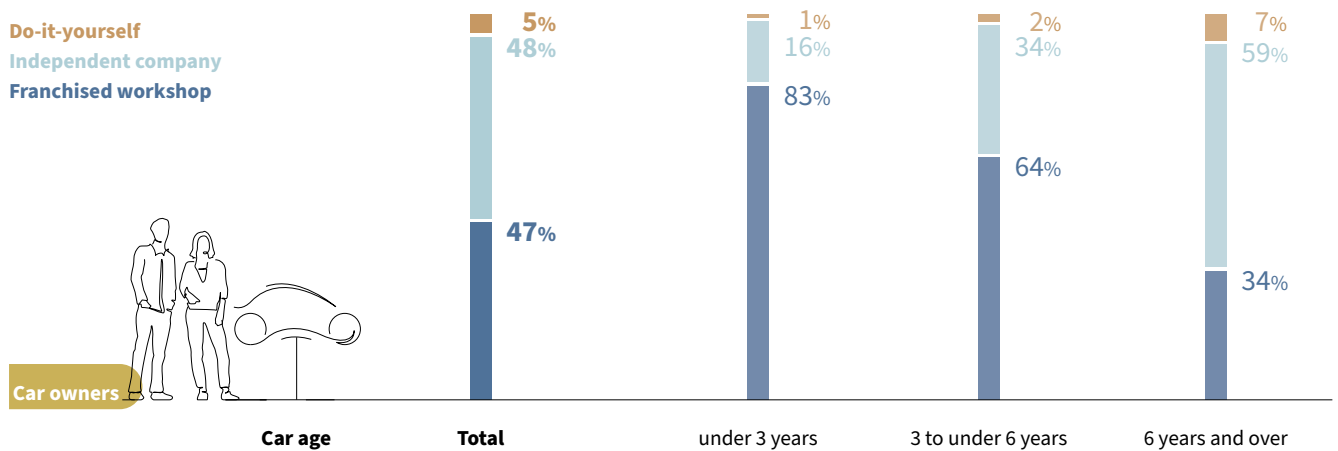
Source: DAT

W3 Servicing frequency and service costs 2024

Car owners	Number of services per car		Gross costs in euros per car	
Total	1.03		389	
Car age				
under 3 years	0.78		282	
3 to under 6 years	1.18		460	
6 years and over	1.03		385	

Source: DAT

W4 Choice of provider for service work 2024



Source: DAT

Most servicing work done by specialised garages

A closer look at the servicing work reveals that it is split almost equally between franchised workshops (47%) and independent workshops (48%); the last 5% is DIY work. How this plays out in detail can be seen in Fig. W4. The younger the car, the more likely it is to be serviced at a franchised garage. And correspondingly, the older the vehicle, the more likely the owner is to contact an independent garage. This can be accounted for by the fact that owners of older cars tend to be more price-sensitive. The DIY rate is also more pronounced here: at 7%, the proportion of car owners with vehicles six years old and older is particularly high.

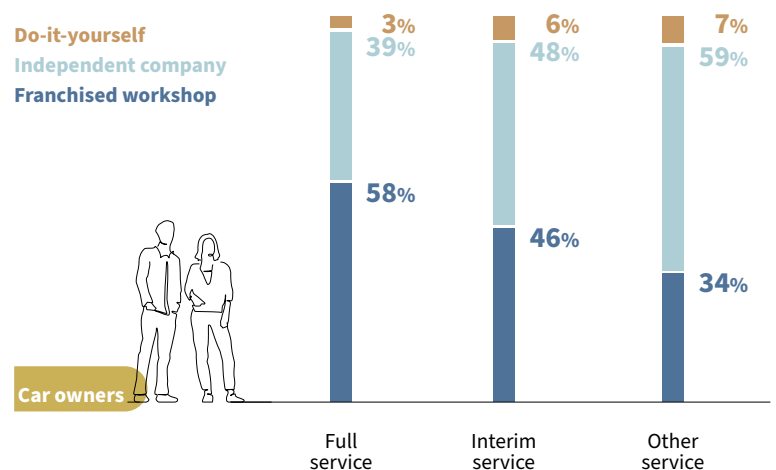
franchised garages enjoy a high level of trust in this area, which is reflected in their stable market share of 58% (2023: 57%). The market for the interim service is shared almost equally between franchised and independent companies. However, interim inspections played a much smaller role overall in 2024. As for the other inspections, i.e. holiday and winter checks or other seasonal services, independent companies have been in the lead for years with a share of 59%. They are much more frequently able to meet the needs of consumers with their offerings and locations.

Importance of scheduled service appointments

Part of the value of a vehicle is determined by whether or not it has a complete service history. For years, car manufacturers have been using flexible intervals for vehicle maintenance, calculated by the on-board computers on the basis of real operating conditions. This means that the service appointments and oil changes are increasingly due at separate times, which can have an impact on the frequency of visits to the garage.

The importance of the full service for their vehicle plays a significant role in the minds of car owners. As illustrated by Fig. W5,

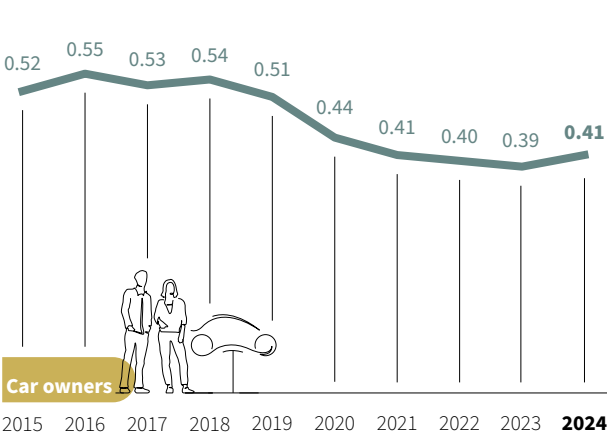
W5 Choice of provider for scheduled servicing 2024



Source: DAT

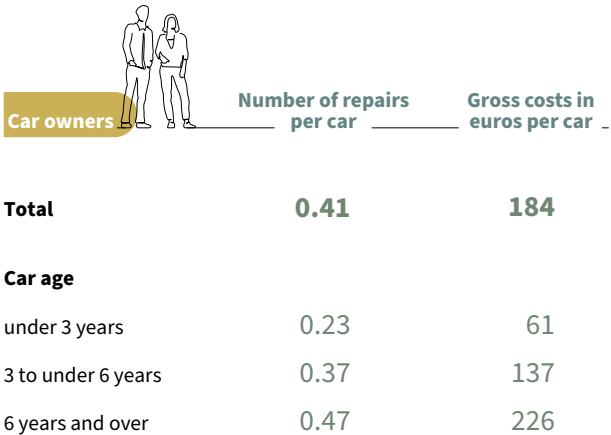
W6 Repair frequency

Number per car/year



Source: DAT

W7 Repair frequency and costs 2024



Source: DAT

4.3 Repairs

Servicing is not the only thing that cars require: any repairs that need doing also send car owners to the garage. The questions in the DAT Report on repairs relate to wear and tear. This is explicitly not about replacing bulbs or windscreen wiper blades, but about various areas relating to the engine, electrics or chassis. First of all, Fig. W6 shows the general repair behaviour, where all wear-and-tear repairs are added up and averaged out per car per year. While the number of repairs has been falling for years and reached a low of 0.39 in 2023, 2024 saw it rise again for the first time (0.41). This may reflect the seasonal temperature fluctuations that made life difficult for batteries, starters and glow plugs.

W6

Repair costs depend on the age of the car

A quick glance at repair frequency and cost reveals clear differences depending on the car's age. In Fig. W7, we see that owners of young vehicles had hardly any wear-and-tear repairs (0.23), so that average costs of just EUR 61 were incurred. For cars between three and six years old, the figure was around EUR 137 for 0.37 repairs. The most frequent repairs, at an above-average level of 0.47 and costs of EUR 226, affected cars six years and older. They have been on the road for a good number of years, the first full inspection was a long time ago, and the first serious wear and tear can occur. Besides the brake systems, this

W7

can also affect the engines. In some cases, pushing components to their limits in terms of design (e.g. lightweight construction/downsizing) is detrimental to lifespan. Across all cars, including those on which no work was carried out, the average repair price was EUR 184 (gross). If we consider just the car owners that actually had repair work done on their cars (30% of all car owners), the average cost was EUR 610.

The providers used for the repair work are depicted in Fig. W8. In 2024, independent garages took care of the majority (57%) of repairs. Franchised garages were commissioned by 35% of car owners. The fact that independent garages were generally ahead in terms of repairs is due to the fact that a higher proportion of cars are generally serviced by independent garages after the warranty has expired or after the first change of owner. However, the trend shows a slight decline in the market share of independent garages, while at the same time the share of franchised garages has risen. This could indicate that the car manufacturers have excluded the independent garages from certain repairs by restricting access to some diagnostic options. From the point of view of all garages, however, the continuous decline in the DIY share to 8% over the last few years is pleasing. Even though the car population is ageing rapidly, do-it-yourselfers are doing less and less of the work.

W8

W9

The types of repair work carried out on cars in 2024 is portrayed in Fig. W9. This indicates that the biggest area was again wear-and-tear parts (67%). Even though this figure fell by four percentage points compared to the previous year, the overall very high figure points to a decline in the sturdiness of various components. This was followed by 'power train and electrical system' at 39%. The increase of four percentage points over 2023 is increasingly due to repairs to electronic systems. Repairs to the 'chassis and body' components were cited the least, at 32% each.

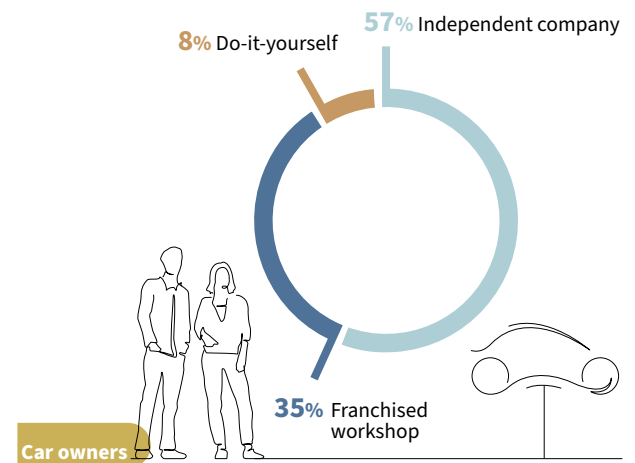
Frequent software problems

With the growing amount of electronics in cars, they have become substantially safer, more environmentally friendly and more comfortable over the years. But electronics and software develop faster than the engineering that uses them. Cars are apparently launched on the market with systems that are not fully developed or tested, and only reach system maturity after a series of different updates. So it is not surprising that when asked whether there are problems with electronics or software (e.g. with the display, connectivity, assistance systems), 28% of owners of younger cars answered in the affirmative – see Fig. W10.

W10

The older the car, the lower the percentage of car owners who reported software problems with their vehicle. This is almost certainly due to the fact that older cars overall have less software or it has already reached a mature state.

W8 Choice of provider for repair work 2024

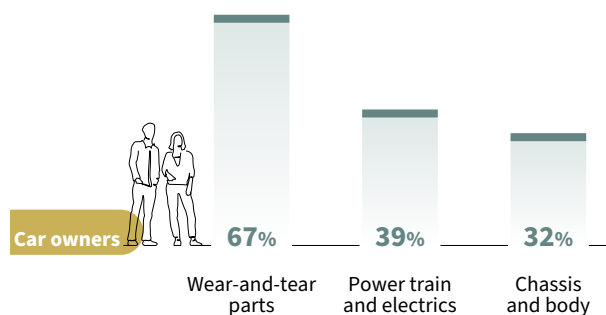


Source: DAT

In most cases, such malfunctions do not affect the basic functions of the vehicles, so drivers generally remain mobile. But: displays that fail repeatedly, faults and malfunctions of secondary systems, which are the reason for the extra workshop visits and necessary updates, significantly impair the product experience and ultimately also reduce consumers' confidence in modern cars.

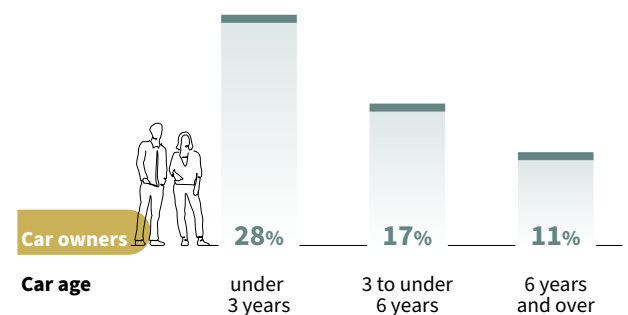
W9 Statements of car owners: repair work carried out 2024

Multiple answers possible

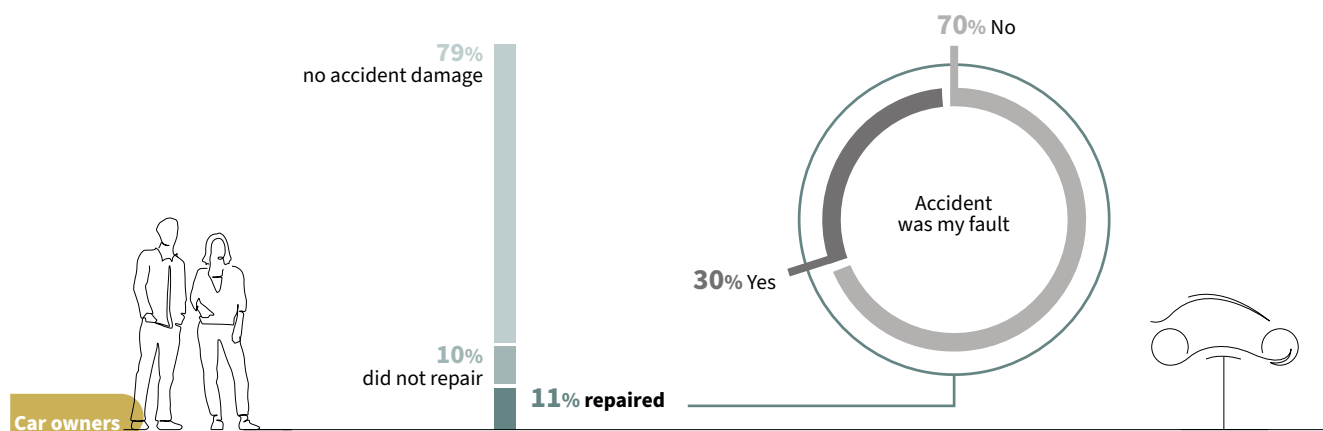


Source: DAT

W10 Software problems in cars 2024



Source: DAT

W11 Accident damage: repairs and fault 2024

Source: DAT

4.4 Accident repairs/Claim settlement

1 Attitudes and costs

Fortunately, for car owners, an accident is always an exceptional situation in a motorist's day-to-day life.

W11 Fig. W11 shows that almost 80% of car owners were accident-free last year, while nearly one in five had an accident. Apart from the shock and any physical injuries that may be incurred, settling an accident claim is not an everyday occurrence for the car owner. In order to make the term 'accident damage' as simple and understandable as possible, the DAT Report survey defined it first of all as an external impact on the car (frontal collision, rear-end crash, etc.), and then listed additional terms such as parking dents, damage caused by stone chips or hail, damage to paintwork or glass. This ensures that respondents can distinguish accident damage from wear-and-tear repairs and servicing work.

Most accident damage is repaired

Out of all consumers who suffered accident damage to their car, many car owners (11%) had the accident repaired. Very slightly fewer (10%) did not. So there is plenty of potential here for garages to offer their customers repairs during a garage visit. The garage can record such damage during the check-in process.

Interestingly, while almost all accident damage figures remained constant compared to the previous year, the number of unrepaired accidents rose by two percentage points over the previous year. This could also be an indication of the uncertain economic situation and that car owners are carefully weighing up what they spend their money on in these times. This might include one or two accident repairs that have been put off. One other point should be mentioned here: of all accident damage repaired in 2024, the car owners themselves were at fault in 30% of cases; the vast majority of 70% stated that they had been involved in an accident through no fault of their own.

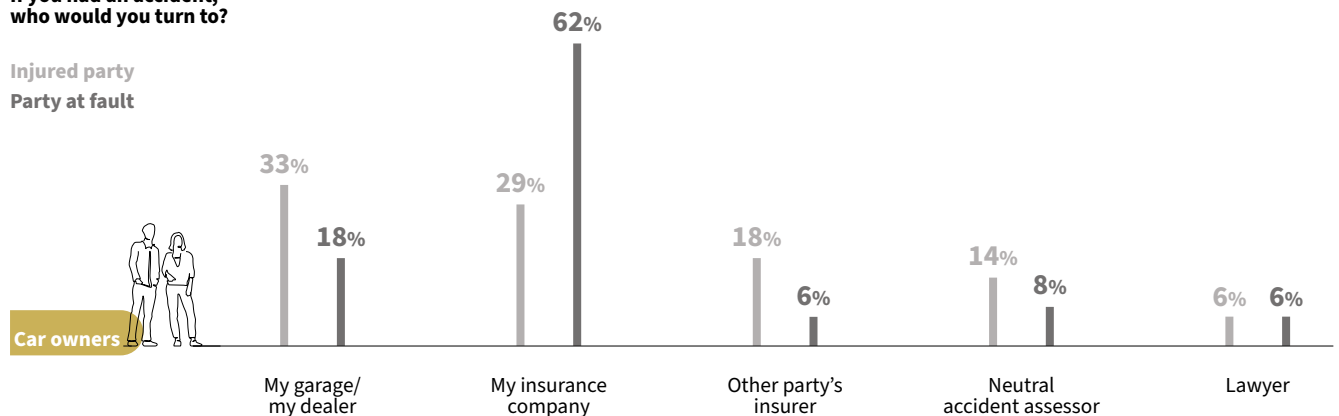
First contact after an accident varies

Who the car owner turns to after an accident depends on whether he is the injured party or the person who caused the accident. The DAT Report approaches this topic with a purely hypothetical question: "An accident has a long-term impact on the value and therefore the resale price of your vehicle and involves a lot of time and effort in communicating with all parties involved. If you were the injured party in an accident, who would you probably contact first?" The same was asked for a situation where the respondent was the party at fault, adjusted accordingly. Their answers

W12 Contacted after an accident 2024

If you had an accident, who would you turn to?

Injured party
Party at fault



Source: DAT

are illustrated in Fig. W12, It is very noticeable that a high proportion of the at-fault group (62%) would first contact their own insurance company, followed at a considerable distance by their garage (18%). The neutral motor vehicle expert (8%) and then the other party's insurance company or a lawyer (6% each) are only in single digits. The picture is entirely different for an injured party: at 33%, their own garage is the first port of call, followed by their insurance company at 29%. The other party's insurance company (18%) and the neutral expert (14%) follow in third and fourth place. A lawyer would be the first person that just 6% of people would call after an accident. The results show clearly that the objective is different in each case: anyone who causes an accident first wants to be sure that the damage is covered by their policy. For the injured party, on the other hand, the focus is on speedy repairs.

62%

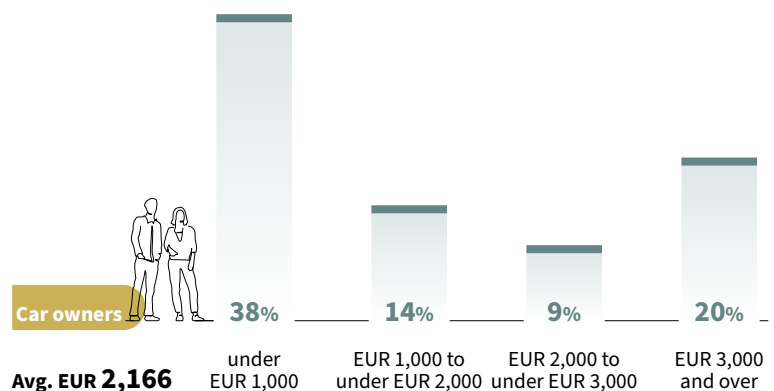
of car owners would first contact their own insurance company if they caused an accident

Slightly less minor damage

The cost of accident repairs is rising. This is due to higher parts prices and hourly rates. However, the increasingly complex systems in modern cars are also driving up costs. The sensors, cameras and headlights installed in the front apron alone can easily cost a five-figure sum, but are often destroyed in a typical parking collision. Nevertheless, the assistance systems appear to fulfil their task: the average amount of damage actually fell slightly to EUR 2,166 in 2024 (previous year: EUR 2,189). As Fig. W13 shows: the percentages in the individual areas have fallen slightly, especially in the lower categories (under EUR 1,000/EUR 1,000 to under EUR 2,000). In contrast, the only increase was in the proportion of claims for over EUR 3,000 (from 18% to currently 20%).

W13

W13 Cost of accident repairs 2024



Source: DAT

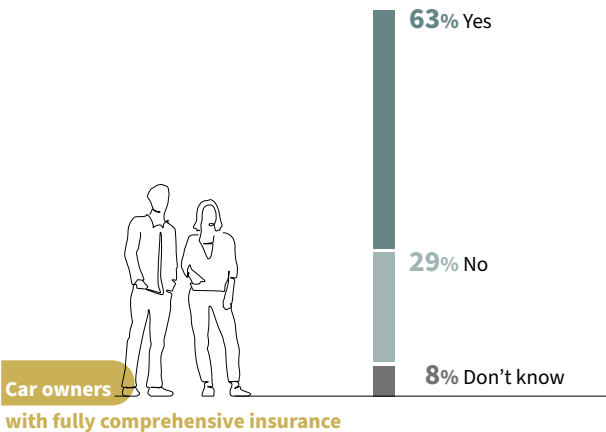
Difference to 100% = don't know

2 Claim settlement/documentation

When an accident is reported to the insurance company, they have the option of limiting the customer’s choice of repair shop. If you have fully comprehensive insurance, for example, your policy may require you to use a certain garage that collaborates or partners with the insurance company. This may result in a cheaper insurance premium, but it may also mean that this partner garage may be further away than your first choice of garage, depending on where you live. These and other arrangements such as towing costs, courtesy car etc. are usually already stipulated at the conclusion of the contract and fall within the scope of claims management. In 2024, this aspect was also surveyed in the DAT Report from the consumer perspective as follows: “In the event of an accident repair covered by your fully comprehensive insurance, do you have a free choice of repair shop , i.e. can you decide for yourself which garage you want to use?” Again, 63% answered “yes” (see Fig. W14), 29% answered “no” and 8% were unable or unwilling to provide any information at the time of the survey. Besides a cooperative and sustainable claims management, the garages are also obligated to follow certain rules, such as fixed hourly rates agreed with the insurers or other prescribed procedures. In return, these companies are given priority with respect to repair orders, and leads

W14

W14 Free choice of garage 2024



Source: DAT

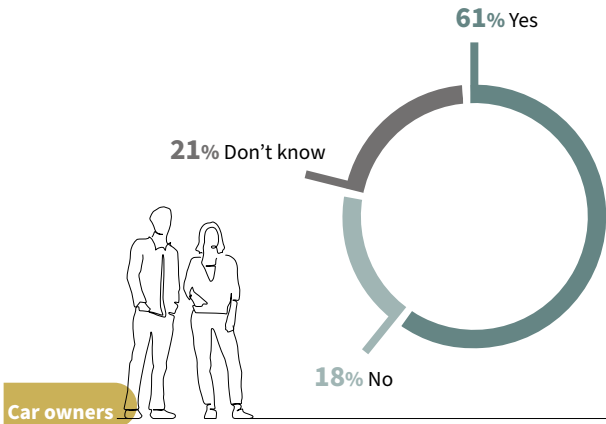
(customer enquiries) are forwarded to them. Over the next few years, claims management will certainly continue to gain in relevance, as insurance premiums continue to rise and consumers try to save money in this area too.

Possibility of damage documentation by the car owner

In the event of an accident, some insurance providers ask the car owner to document the damage. This places the consumer at the beginning of the claims process. For some years now, the DAT Report has been used to determine the extent to which the policyholder is able to send a *First Notice of Loss* (FNOL process) to the insurance company by asking the following question: “Would you be capable of using a smartphone to create meaningful documentation of the damage to your vehicle after an accident (similar to the activities of an appraiser) and send it to your insurance company via an app?” In 2024, as shown in Fig. W15, 61% of the car owners surveyed answered “yes”, a similar proportion to the previous year. 18% answered in the negative, and 21% said they were not sure. This was the case for almost one in four respondents just two years ago. Clearly, the smartphone as an essential component of the claims process is gaining increasing acceptance – and that, by the way, is true of all age groups of car owners.

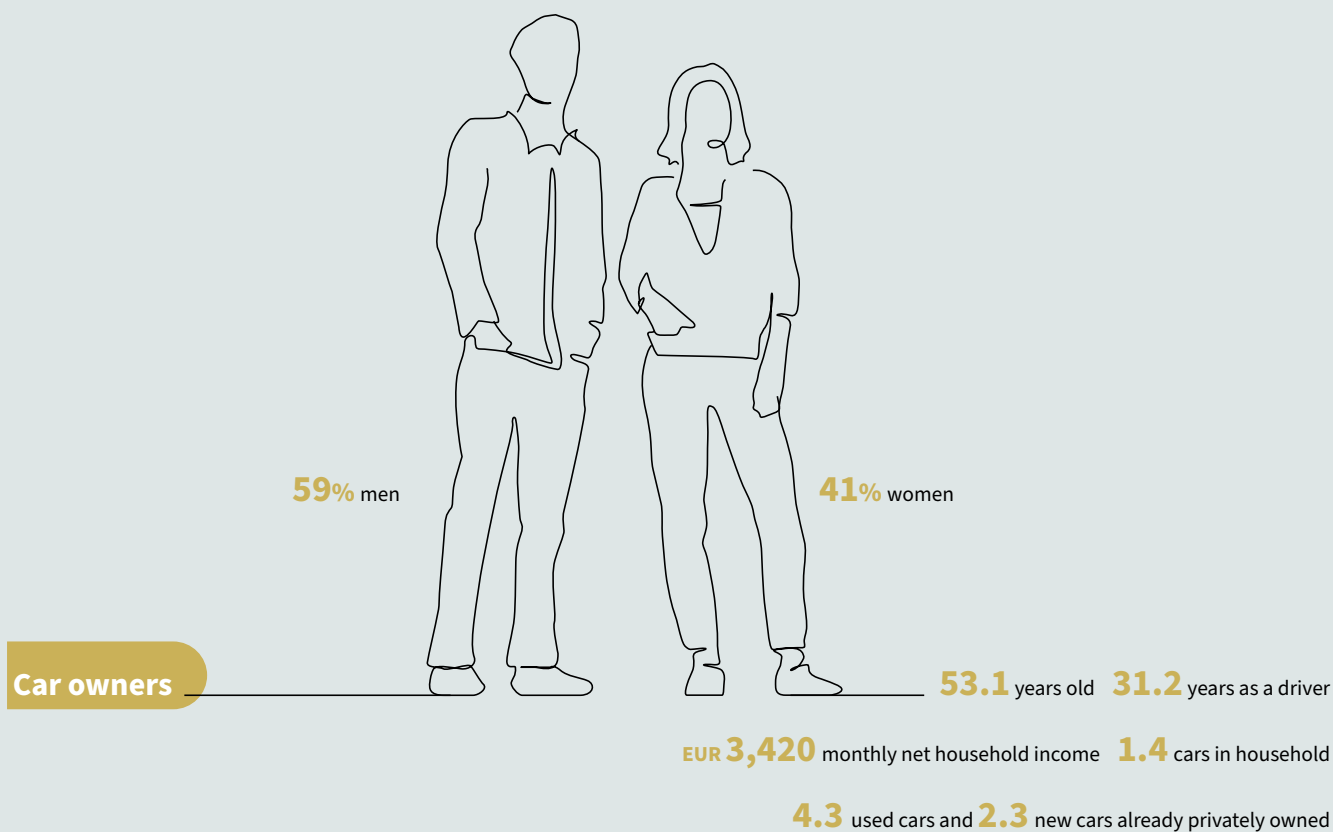
W15

W15 Self-assessment: documenting of damage by smartphone 2024



Source: DAT

W16 The average car owner 2024



Current car



9.5 years old

47% bought as a new car

53% bought as a used car

6.4 years is the average ownership period

12,560 km travelled by car owners on average in 2024

14% had planned to buy a car in 2024, but it didn't work out

4.5 Relationship to car and garage

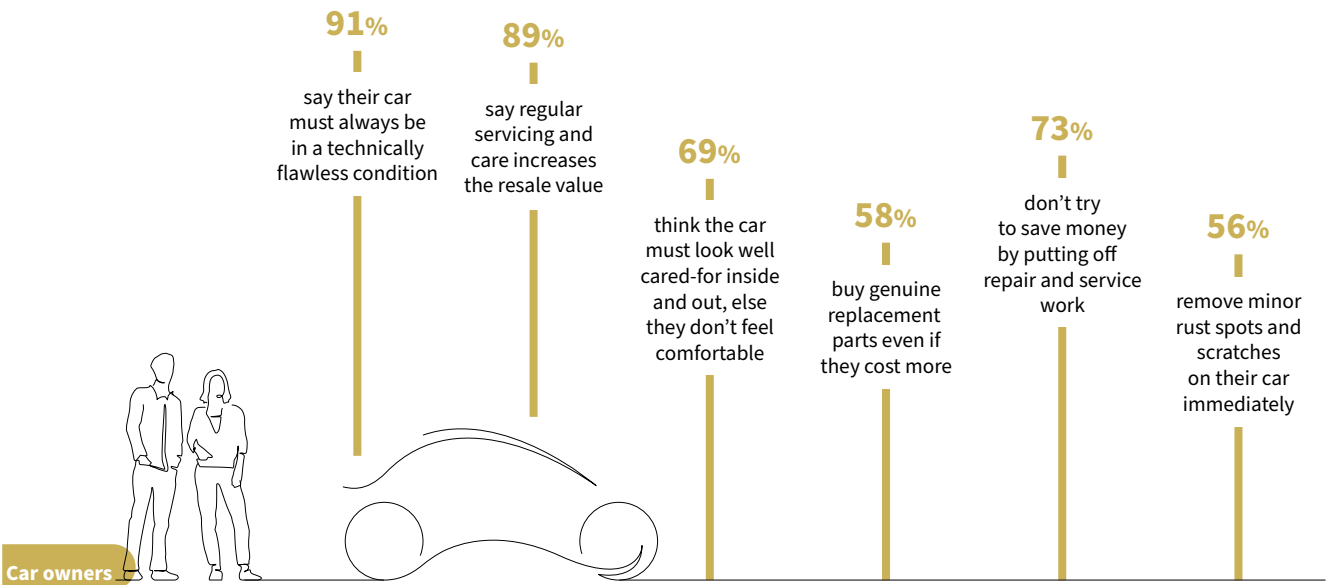
1 Assessments of car owners

People’s relationship to their cars ranges from very intense to very emotionally detached. But what all relationships have in common: they last an average of five to eight years, and during this time every car owner has to invest varying amounts of effort to ensure that their vehicle remains road-worthy. If a representative sample of all private car owners is surveyed, it is noticeable – as shown in Fig. W17 – that almost all of them have a very clear attitude towards the technical condition of their vehicle: in 2024, 91% confirmed that their vehicle must be in flawless technical condition. It takes regular servicing and care to achieve this goal. This is likewise very important to owners – so much so, that they believe such work not only has a beneficial effect on the technical condition, but also on the resale value: 89% shared this opinion in the survey for the DAT Report 2025.

W17

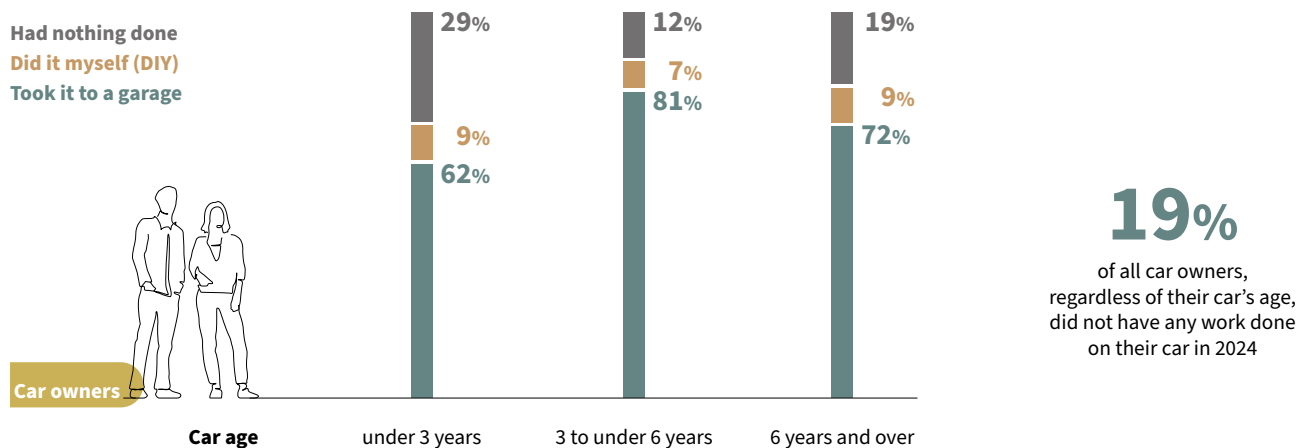
Such activities are cost-intensive, and in order to save money, some car owners put off necessary servicing and repair work. However, this is the minority, as 73% confirmed that they did not postpone necessary work. Almost as many (69%) consider a well-maintained appearance of the interior and exterior of their vehicle important, otherwise they would not feel comfortable. Finally, there are also two points in favour of the special relationship people have with their cars: 58% confirmed that they make a point of buying genuine or OEM-quality spare parts, and 56% have minor rust spots and scratches on the vehicle repaired immediately. This last aspect offers great potential for workshops in the areas of Smart Repair and detailing, as the vehicles of the average car owner must be in a visually and, above all, technically perfect condition from their point of view.

W17 Statements by car owners on value retention and care 2024



Source: DAT

W18 Work done on the car 2024



Source: DAT

Work done on cars varies greatly depending on age

In order to determine whether and how often a car owner had visited a garage, if at all, all car owners were asked the following question: "All in all, how many times in total has your car been to a garage in 2024 for service/maintenance, accident repair, wear-and-tear repair or repair of a defect?"

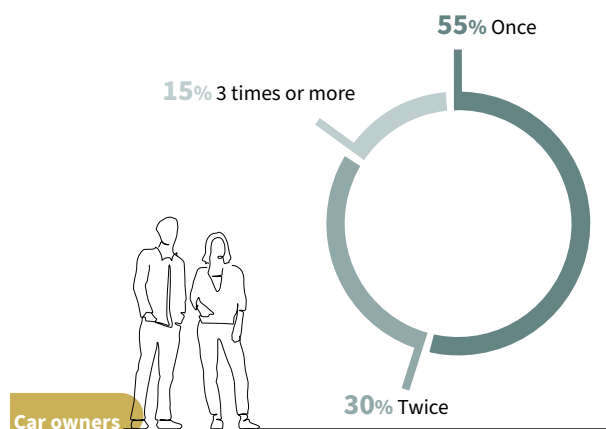
W18 Figure W18 illustrates this very clearly, broken down by vehicle age. Almost a third (29%) of all young cars under three years old needed no repairs at all, while the other two-thirds were mainly repaired by a garage. The latter figure was 57% in the previous year. In other words, the

youngest vehicles are showing a significant increase in susceptibility to repairs. The figure for three- to six-year-old cars was 81% – compared to 78% in the previous year. This can be explained by the fact that typical initial wear-and-tear repairs fall into this phase. Only 72% of vehicles aged six years or older (71% in the previous year) required a visit to the garage. As in the previous year, the DIY share was 9%, and 7% for three- to six-year-old cars. As much of this work is only possible with the aid of a diagnostic device, some of the work is likely to have been carried out by an expert acquaintance.

Majority only visited the garage once in 2024

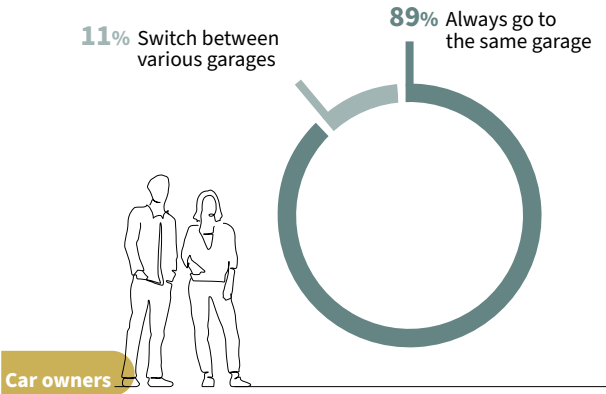
Besides the work performed, if we look at the number of garage visits by the car owners who had work done, the following picture emerges: according to Fig. W19, 55% of this subgroup only took their car in to the garage once; 30% twice; 15% three times or more. This shows how little servicing modern cars need. In 2022 – and this is positive news for garages – 60% of all car owners only went to a garage once, 11% three times or more. In other words, the frequency of garage visits has increased slightly over 2022. This could be explained by software updates that could not be installed over-the-air.

W19 Number of garage visits for work on car 2024



Source: DAT

W20 Garage loyalty: choice of provider for service and repair work 2024



Source: DAT

2 Relationship to the garage

Regardless of the actual number of garage visits, statistical-ly speaking, every car owner took their car in for work 1.5 times in 2024. Whether he sometimes switched workshops or remained loyal can be seen in Fig. W20: 89% were loyal regular customers, with only 11% of car owners stating that they switch between different garages to have work done on their car. The proportion of repeat customers varies only slightly between the different owner groups. As in the previous year, owners of PHEVs or BEVs stand out somewhat at 92%. Overall, it is a positive sign for the automotive industry that it has such loyal customers.

W20 or remained loyal can be seen in Fig. W20: 89% were loyal regular customers, with only 11% of car owners stating that they switch between different garages to have work done on their car. The proportion of repeat customers varies only slightly between the different owner groups. As in the previous year, owners of PHEVs or BEVs stand out somewhat at 92%. Overall, it is a positive sign for the automotive industry that it has such loyal customers.

Good location among the top three reasons

But how do you achieve such high regular customer rates? The DAT Report has been asking respondents for many years what their main reasons were or are for choosing this company. As can be seen in Fig. W21, these twelve criteria reveal where the preferences of the 2024 car year lay – as an overall average and broken down by customers of franchised and independent dealerships. Some of the results of the two customer groups differ substantially. The top three

W21 these twelve criteria reveal where the preferences of the 2024 car year lay – as an overall average and broken down by customers of franchised and independent dealerships. Some of the results of the two customer groups differ substantially. The top three

criteria for the average car owner are ‘regular customer’, ‘value for money’ and ‘good location’. These factors illustrate how important closeness to home or the location in general is to car owners. The situation is different for customers of a franchised garage. For them, it was not the location, but the points ‘regular customer’, ‘bought my car there’ and ‘good support/advice’ that were decisive in their choice of garage.

Soft skills often make the difference

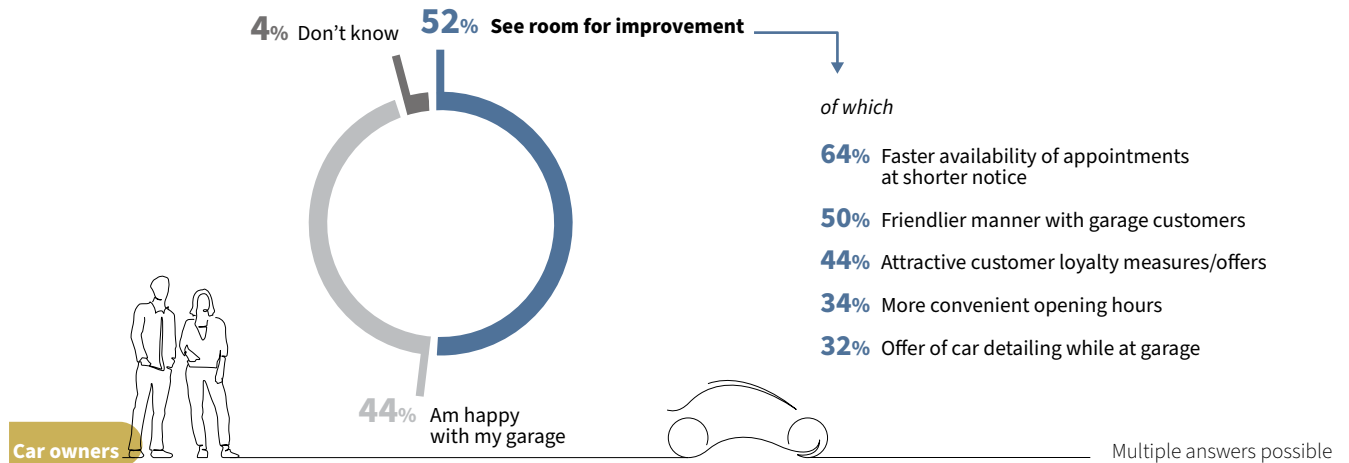
A pleasant manner and friendly staff still ranked among the top five criteria in the overall average and for customers of independent garages, while it came in sixth place for customers of franchised garages. In contrast, good support and advice was in the top five for all three subgroups. All this shows that despite the more technical nature of the topics that are dealt with at the garage, customers place a strong emphasis on interpersonal factors. All respondents also rated the criterion ‘certified workshop’ of the German automotive trade, as important. This master craftsman’s sign boosts consumer confidence and can be added as an additional sign.

W21 Ranking: criteria for choosing a garage 2024

Car owners	Total	Franchised garage	Independent company
Am a regular customer	1	1	3
Good value for money	2	5	1
Good location/accessibility	3	4	2
Good support/advice	4	3	4
Pleasant manner, friendliness	5	6	5
Certified workshop	6	7	6
Bought my car there	7	2	11
Appointments situation/ fast availability of appointments	8	8	8
Recommended by friends/family/other	9	11	7
Convenient opening hours	10	10	9
Positive reviews of company on internet	11	12	10
Have to use the garage (service plan, warranty, insurance ...)	12	9	12

Source: DAT

W22 Optimisation potential in the workshop: view of franchised garage customers in 2024



Source: DAT

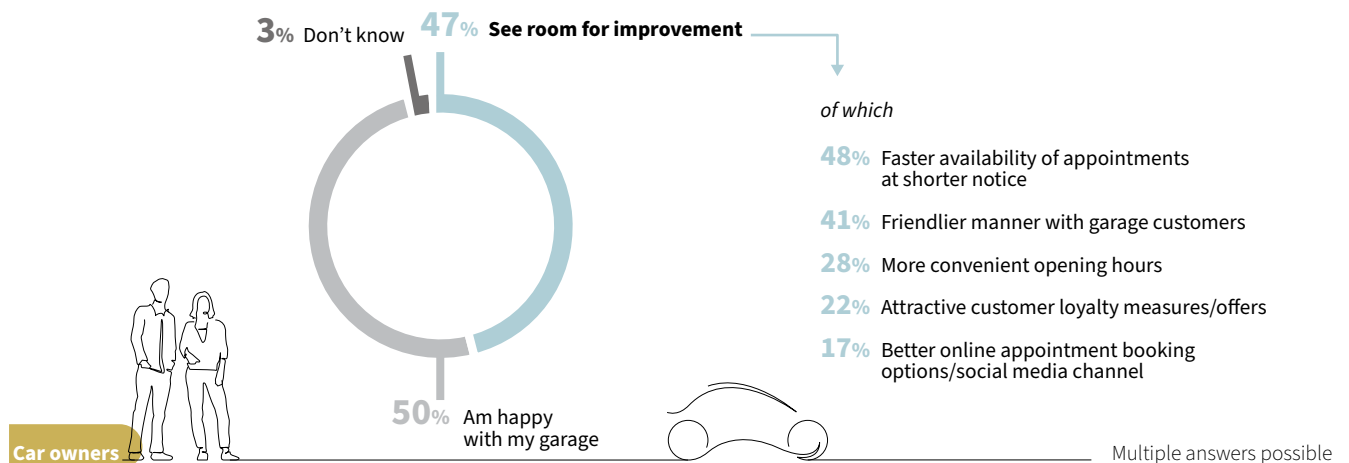
Optimisation potential from the consumer's perspective

For the first time, car owners were asked to think about whether and where they see potential for optimisation at their garage. They were instructed to ignore the issue of costs. The results for customers of franchised garages are shown in Fig. W22. It shows that the main criticisms, if there were any, had to do with the availability of appointments (64%). The issue of politeness came a distant second (50%). This was closely followed by criticism of the unattractive customer loyalty measures, or the complete lack thereof.

W22

W23 Figure W23 illustrates the perspective of customers of independent companies. Compared to the customers of the franchised garages, the points of criticism are similar, but much less pronounced. Another difference is the desire for the option (or improvement) of online appointment booking via the garage's website or social media channel (17%). Overall, however, the level of satisfaction was high, even though in times of a shortage of skilled labour and the high overall capacity utilisation, the garages had hardly any time to offer additional services.

W23 Optimisation potential in the workshop: view of independent company customers in 2024



Source: DAT

W24 Making contact with garage 2024

3 Making contact

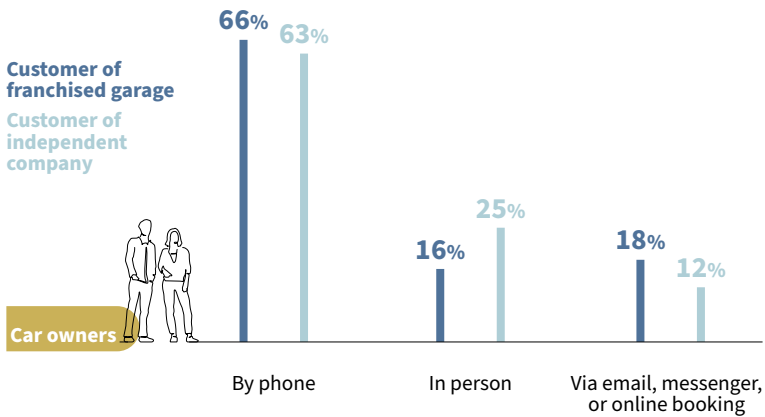
When car owners need work carried out by a garage, this usually involves making an appointment in advance. To analyse this part of the garage-customer journey in more detail for the DAT Report, the survey asked about contact with the garage. All car owners who actually had their work carried out by a garage were asked to provide information on this. The question focused on the initial contact.

There were several possible answers to this prompted question, which are shown in Fig. W24.

When analysing the results, a distinction was again made between customers of franchised and independent companies. What is noticeable here is that the initial contact is usually made by phone for both customer groups. 66% of customers of franchised workshops and 63% of customers of independent businesses used this communication channel in 2024. There were differences in personal visits and contact via email, messenger or online booking. Customers of independent garages were more likely to drop by the garage first and request an appointment (25%; customers of franchised garages: 16%), while customers of franchised workshops were more likely to send an email (18%; customers of independent garages: 12%). Due to the fact that there are much higher numbers of independent than franchised businesses in Germany, a personal visit to request an appointment with an independent business appears to be quite easy to do, while the franchised businesses, being spread more thinly, were more likely to be contacted by e-mail or via other online channels.

Average waiting time of just under 10 days

As soon as the car owner requests an appointment, the garage is keen to fulfil this request as quickly as possible. In times of an acute shortage of skilled labour in the automotive industry, the situation was also very tense in 2024, so it made sense to investigate this topic on a representative basis for the DAT Report. All car owners

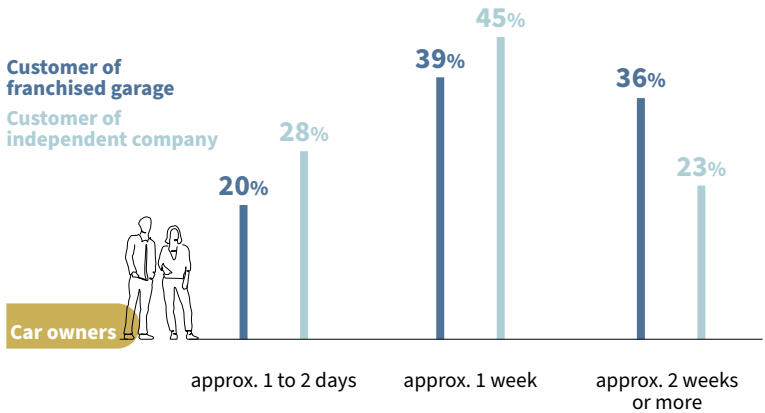


Source: DAT

who request work to be done in garages were asked to estimate how many days they had to wait for an appointment.

As Fig. W25 illustrates, 20% of customers of franchised companies and 28% of customers of independent companies only had to wait a day or two for an appointment. The waiting time was up to one week for 39% of customers of franchised garages and 45% of independent garages. 36% of customers of franchised garages and 23% of customers of independent garages had to wait for two weeks or longer. The waiting time can also vary greatly depending on the brand if, for instance, product recalls are underway, special parts have to be ordered or the garage appointment coincides with the wheel change season.

W25 Waiting time for garage appointment 2024



Source: DAT

Difference to 100% = don't know

In total, the independent companies were able to offer over 70% of their customers an appointment within one week, the franchised garages just under 60%. The mathematical average waiting time for a garage appointment for all car owners in the whole of 2024 was 9.3 days.

Customers often not proactively approached

The high workshop capacity utilisation in 2024 had several consequences with respect to how customers were approached at the point of sale. Not only was it difficult to get an appointment within the next week or two, but there was often hardly any time or staff available to offer additional services. This is shown very clearly in Fig. W26. The main insights in advance: as in the previous year, customers were not actively approached about additional services in most cases. For example, 61% of car owners in franchised dealerships and 62% of customers of independent dealerships were not made aware of offers such as tyre storage, accessories, minor repairs or the option of selling their own car. Only 29% of customers of franchised garages and 22% of those in independent garages were actively approached about the wheel and tyre business. There is huge untapped potential in the removal of minor damage such as scratches or dents. Only around one in ten customers was made aware of this. The proactive sale of accessories or an offer of purchase of the existing car was only in the low single-digit percentage range.

W26

61%
of customers of
franchised garages were
not proactively offered
additional services

Explanation of workshop invoice takes place frequently

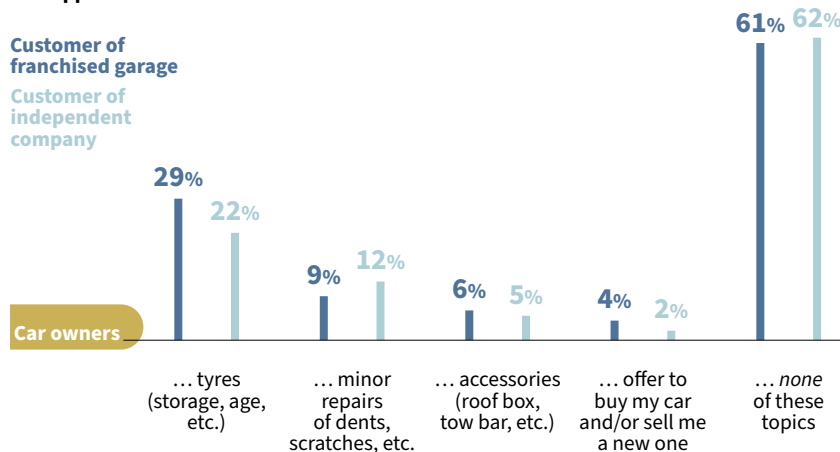
For many garages, on the other hand, it goes without saying that they will explain the invoice, as illustrated by Fig. W27. However, 8% were not given any information, but would have liked to have the invoice explained. Another 14% were given no explanation, but were also not interested. This was true of 12% of customers of franchised garages and 17% of customers of independent businesses.

W27

W26 Additional services offered at point of sale 2024

Multiple answers possible

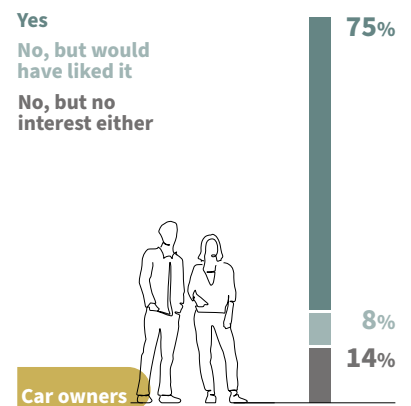
Was approached about ...



Source: DAT

W27 Explanation of workshop invoice 2024

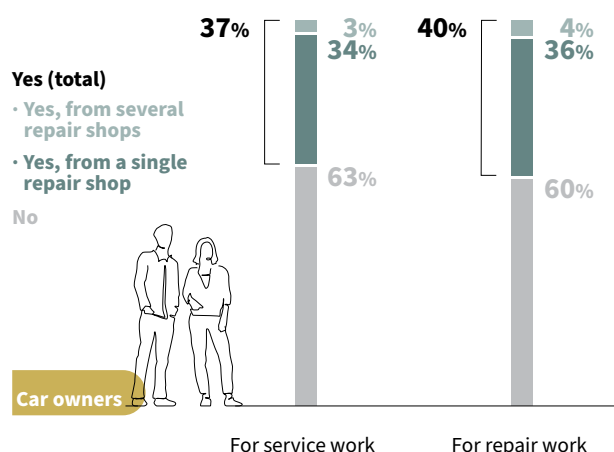
Was the invoice explained at point of sale?



Source: DAT

Difference to 100% = no answer

W28 Requests for cost estimates 2024



Source: DAT

4 Cost estimates and online behaviour

As the cost of living was still as high as in 2023, car owners had a great interest in being able to plan their expenses. Obtaining cost estimates fits into this context. So the survey asked all car owners whether they had obtained a cost estimate for their most recent maintenance or repair work. As can be seen in Fig. W28, 37% of all car owners requested an estimate before the last service and 40% before the last repair work. These are both slight increases of two percentage points over the previous year. Three

W28

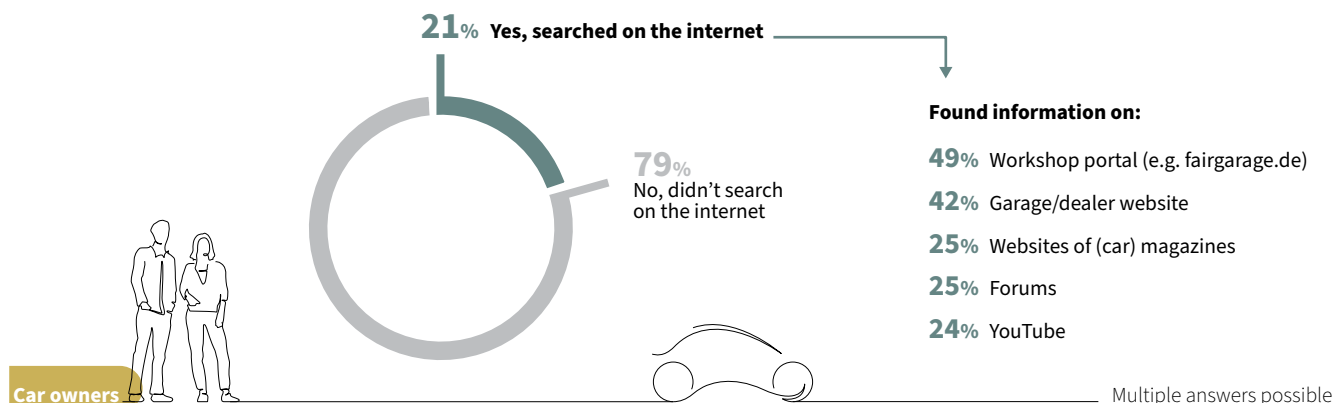
and four percent of all car owners (for service and repairs respectively) stated that they obtained cost estimates from more than one garage to compare prices. The other 34% and 36% respectively only turned to a single workshop. It is striking that in 2024, young car owners in particular were also particularly likely to request cost estimates from one or more garages: 53% of under-30s before the most recent servicing work they had done, 50% before the most recent repair work.

Online research of prices and information

If, in addition to a professionally prepared cost estimate, a car owner wants to find out about possible prices before an upcoming repair or maintenance, they will seldom find what they need to know on the internet. Two key aspects of this behaviour are portrayed in Figure W29: first, the fundamental question of whether the respondent searched for this kind of information on the internet at all, and second, where they found relevant information. What is striking here: overall, the number of people who researched online before requesting repairs or servicing in 2024 was slightly higher than in the previous year at 21% (2023: 19%), but is still fairly limited. This kind of search behaviour was particularly pronounced only among car owners under 30 years of age. As in the previous year, 47% of them researched online before visiting a garage. Overall, though, this is nothing like the online search behaviour of used-car and new-car buyers on their customer journey.

W29

W29 Searched online for information about costs and garages 2024



Source: DAT

Nevertheless, with the need for information is as high as ever, car owners in 2024 consulted various sources on the internet, as can likewise be seen in Fig. W29. The remaining workshop portals topped the list of online searches for the first time this year at 49%. They managed to gain importance compared with the previous year. The websites of car dealerships and garages came in second place at 42%, followed at a considerable distance by the websites of various automotive magazines and online forums at 25% each. YouTube took last place at 24%, although strictly speaking little or no specific price information on individual vehicle repairs can be obtained via YouTube, but interested parties can at least obtain valuable information on certain repairs (search term “car doctors” on YouTube).

Online bookings surpass 50% for the first time

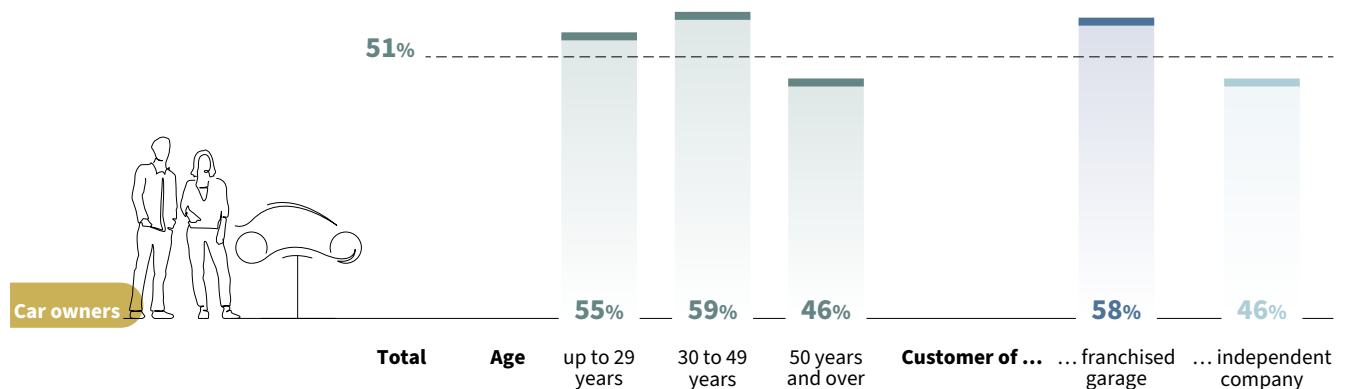
Some of the workshop portals not only provide price information, but also offer an online booking function that incorporates their repair data and prices. In this context, all car owners were asked the following question: “Would you make a binding online booking of a service appointment and/or repairs for your car at a garage?” The willingness to do this was at an all-time high of 51% in 2024 (2023: 49%), as Fig. W30 shows. This further increase on the previous year represents highly relevant potential for garages. There were clear differences between the subgroups. Car owners under 30 years of age were much more open to making bookings via the internet (55%) than, for example, the 50+ age group (46%). The intermediate age group of 30 to 49 years was the most willing to book online, at 59%. A difference can also be seen among customers of franchised garages, 58% of whom said they would book online, while only 46% of customers of independent garages would carry out such a process online. This could be due to the different size and organisational structure of authorised and independent garages.

W30

58%

of customers of franchised garages would make a binding booking of a service appointment or repairs online

W30 Willingness to make online booking for service/repairs 2024



Source: DAT

OVERVIEW Trends + Key Data

Z1 New-car market

New cars	Units in millions	Avg. price* EUR
2005	3.342	23,880
2006	3.468	24,480
2007	3.148	25,970
2008	3.090	25,990
2009	3.807	22,520
2010	2.916	26,030
2011	3.174	27,390
2012	3.082	26,780
2013	2.952	27,030
2014	3.037	28,330
2015	3.206	28,590
2016	3.352	29,650
2017	3.441	30,350
2018	3.436	31,130
2019	3.607	33,580
2020	2.918	36,340
2021	2.622	37,790
2022	2.651	42,790
2023	2.845	44,630
2024	2.817	43,530

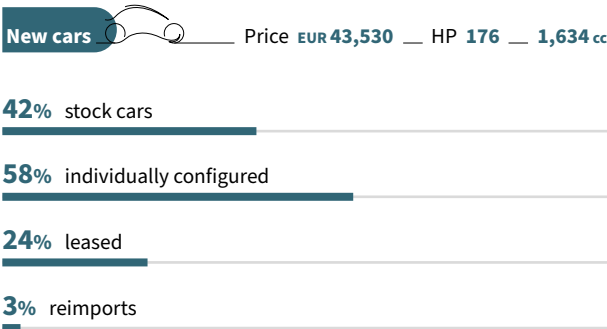
Source: DAT/KBA *Transaction price

Z2 Used-car market

Used cars	Units in millions	Avg. price* EUR
2005	6.655	8,330
2006	6.733	8,310
2007	6.262	8,400
2008	6.112	8,690
2009	6.013	8,590
2010	6.432	8,790
2011	6.809	9,740
2012	6.883	9,150
2013	7.092	9,420
2014	7.070	9,870
2015	7.330	10,620
2016	7.403	11,430
2017	7.298	11,250
2018	7.192	11,780
2019	7.195	12,470
2020	7.021	14,730
2021	6.703	15,740
2022	5.642	18,800
2023	6.031	18,620
2024	6.480	18,600

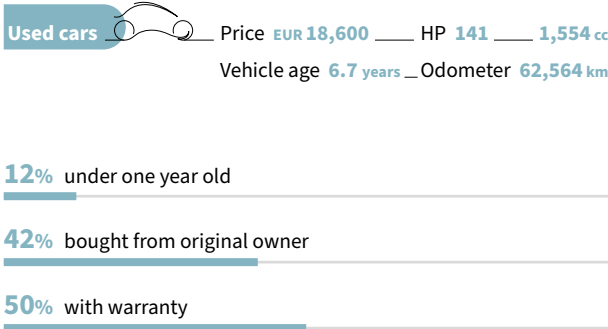
Source: DAT/KBA *Transaction price

Z3 The average new car 2024*




Source: DAT *of a private new-car buyer

Z4 The average used car 2024




Source: DAT

Z5 Used-car market

Used-car purchase 	Franchised dealers		Independent dealers		Private market		Total	
	2023	2024	2023	2024	2023	2024	2023	2024
Ownership transfers in millions	2.231	2.722	2.051	2.203	1.749	1.555	6.031	6.480
% share	37	42	34	34	29	24	100	100
Average price in EUR	26,170	26,140	15,680	13,390	12,550	13,070	18,620	18,600
Vehicle age in years	4.6	3.9	7.6	8.3	9.1	9.1	7.0	6.7
Kilometres on the dial	49,294	39,983	80,537	75,904	86,413	82,384	70,788	62,564
Buyer share in %:								
First-time buyers	8	8	10	19	15	15	11	14
Additional-car buyers	5	3	4	12	7	3	5	6
Replacement buyers	87	89	86	69	78	82	84	80
Buyer age in years	45	45	43	41	40	41	43	43
Net monthly household income in EUR	3,876	3,842	3,492	3,706	3,420	3,461	3,601	3,690
Ownership period for previous car in months	82	83	83	86	71	73	80	81


Source: DAT/KBA

Z6 New-car market

New-car purchase 	2022	2023	2024
New car registrations in millions	2.651	2.845	2.817
No. of commercial units in millions	1.699	1.909	1.901
No. of private units in millions	0.952	0.936	0.916
CO ₂ emissions in g/km	109.6	114.9	119.8
Average price in EUR	42,790	44,630	43,530
Buyer share in %:			
First-time buyers	2	1	2
Additional-car buyers	3	3	4
Replacement buyers	95	96	94
Buyer age in years	47	46	46
Net monthly household income in EUR	4,792	4,636	4,728
Ownership period for previous car in months	74	72	77


Source: DAT/KBA

Z7 Service work

Car 	Service work in units per car	Service outlay in EUR per car*
2005	0.98	212
2006	0.96	247
2007	0.97	241
2008	0.96	239
2009	0.87	228
2010	0.91	230
2011	0.96	255
2012	0.90	252
2013	0.91	261
2014	0.83	245
2015	0.79	235
2016	0.88	265
2017	0.87	275
2018	0.90	263
2019	0.88	277
2020	1.05	315
2021	0.98	316
2022	0.98	329
2023	1.00	357
2024	1.03	389


Source: DAT _____ *gross

Z8 Repair work

Car 	Repair work in units per car	Repair outlay in EUR per car*
2005	0.79	186
2006	0.75	175
2007	0.72	163
2008	0.70	187
2009	0.62	172
2010	0.67	201
2011	0.62	173
2012	0.65	215
2013	0.61	191
2014	0.55	171
2015	0.52	162
2016	0.55	171
2017	0.53	167
2018	0.54	177
2019	0.51	180
2020	0.44	146
2021	0.41	144
2022	0.40	153
2023	0.39	178
2024	0.41	184


Source: DAT _____ *gross

Z9 Service work per car per year

Car 	2022	2023	2024
Full service	0.34	0.39	0.37
Interim service	0.35	0.35	0.37
Other service	0.29	0.26	0.29
Total	0.98	1.00	1.03
Service outlay in EUR	329	357	389

Source: DAT _____


Z10 Repair work per car per year

Car 	2022	2023	2024
Repair work	0.40	0.39	0.41
Repair outlay in EUR	153	178	184
Accident repairs	0.10	0.11	0.11

Source: DAT _____

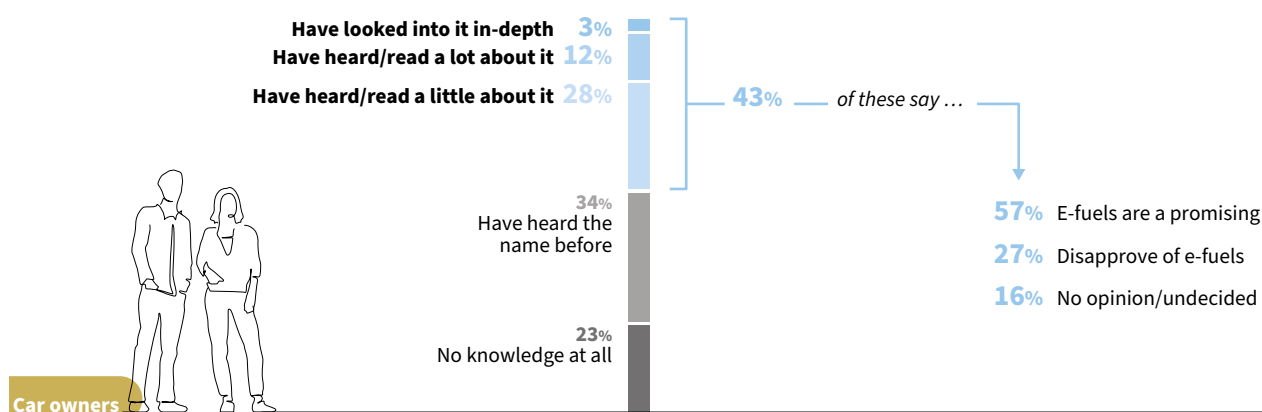
Z11 Servicing and repair market

Figures in percent

Car 	Work performed	Franchised garage			Independent company			Do-it-yourself		
		2022	2023	2024	2022	2023	2024	2022	2023	2024
Full service		58	57	58	38	40	39	4	3	3
Interim service		48	46	46	47	47	48	5	7	6
Other service		32	37	34	60	57	59	8	6	7
Repair work		31	32	35	56	59	57	13	9	8
Total		42	44	43	50	50	51	8	6	6

Source: DAT _____

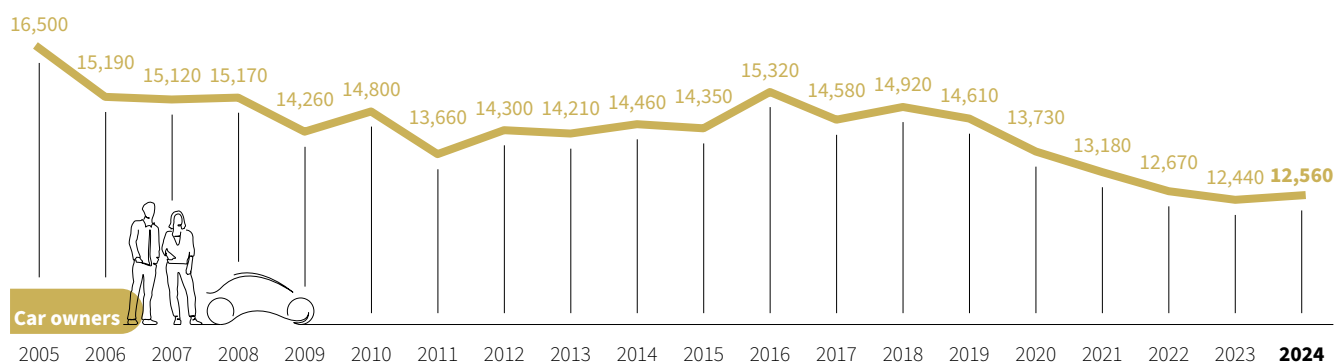
Z12 E-fuels: knowledge level and assessment of car owners 2024



Source: DAT

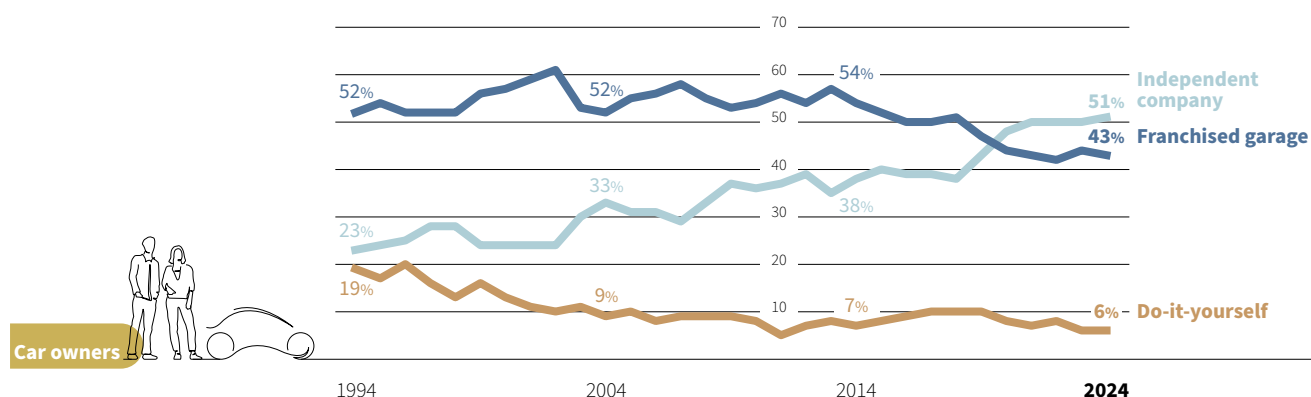
Z13 Annual mileage of car owners

In kilometres



Source: DAT

Z14 Choice of provider for service/repairs



Source: DAT

Difference to 100% = no answer



Deutsche Automobil Treuhand GmbH

Deutsche Automobil Treuhand GmbH (DAT) is the neutral data authority of the automotive industry. In accordance with its mandate, this international company collects and prepares comprehensive static and dynamic vehicle data and provides the sector with cost-effective, nationwide access to it via IT systems such as SilverDAT® and suitable interfaces.

The attributes data-driven, responsible, knowledgeable, market-regulating, car-enthusiasts, networking and forward-looking are firmly anchored in DAT's core brand. Thus DAT sees itself as a neutral intermediary between all the stakeholders in the automotive industry. Ever since 1931 it has been funded by its three partners: the VDA (Association of the German Automotive Industry), the VDDC (Association of International Motor Vehicle Manufacturers) and the ZDK (German Federation for Motor Trades and Repairs). This structure gives DAT a unique status and a special mandate within the automotive industry.

DAT's know-how is made available both in the form of its nationwide network of automotive experts in Germany (the DAT Expert Partners)

and in the SilverDAT® software family. These process-oriented applications include e.g. precise vehicle identification via VIN (Vehicle Identification Number) requests, repair-cost calculations, used-car valuations, key-data analyses and residual-value forecasts.

Hire-car costs and compensation for loss of use can also be automatically calculated where necessary. The process-oriented online claims-management system which is also included in SilverDAT®, facilitates paperless communication between all parties involved in a claim and allows them to process digital claims files.

Using data science and Artificial Intelligence, new products and services are created, such as FastTrackAI® (support in image analysis for damage assessment using Artificial Intelligence), the provision of telematics data or analyses of large data volumes for new projects. The DAT Group is represented in numerous international markets by its subsidiaries and holding companies. A number of consumer associations represented on the DAT advisory board oversee the company's practices, ensuring complete transparency, close monitoring and a high level of independence.

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