

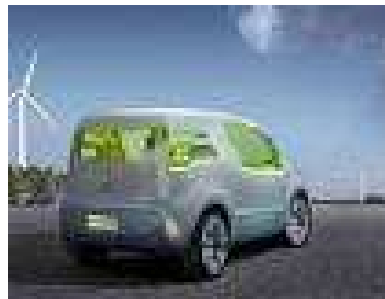


Ipsos Marketing
The Innovation and Brand Research Specialists

Europcar

European Transportation & Mobility Observatory 2010

Focus on Germany



Nobody's Unpredictable



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1. Survey presentation

Sample description

- **Selected target:** People who owned at least one car in the household or drivers
- The project was conducted in **7 countries:**

	UK	France	Germany	Italy	Spain	Belgium	Portugal
							
Sample size	1000	1020	1019	1011	1055	515	507

- **Representative sample** in terms of gender, age and region of each country.
- Interviews have been realized from August, 5th to 23th 2010.
- In order to be representative of the European drivers, **countries have been weighted** according to their real weight in Europe:

	UK	France	Germany	Italy	Spain	Belgium	Portugal
							
Weight in Europe	19%	19%	25%	19%	13%	3%	3%



How to read the results?

Question

Respondent base

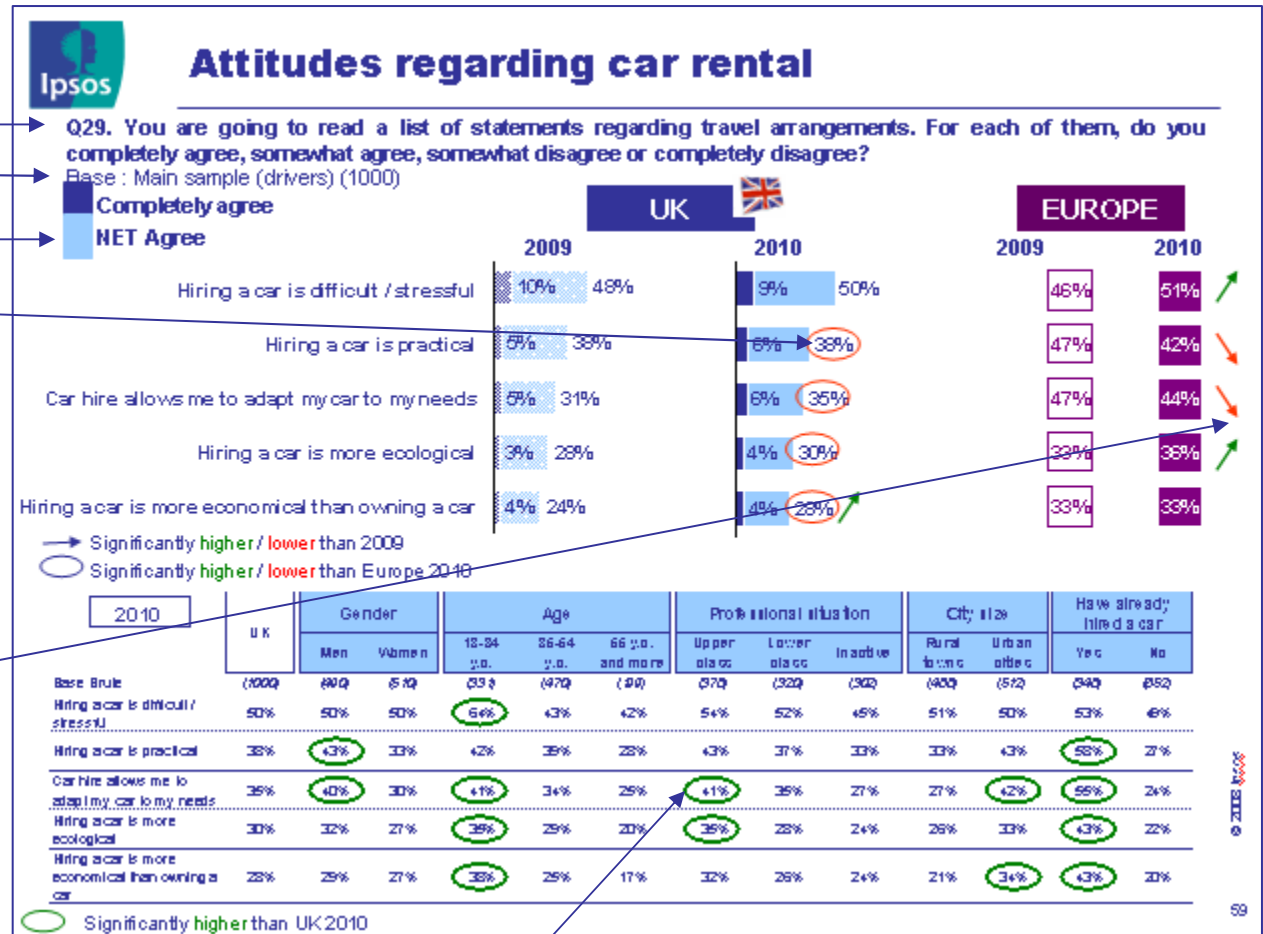
Information on figures

Significant differences (95% confidence level) between Europe and the country

Green : the country is significantly higher than Europe
Red : the country is significantly lower than Europe

Significant differences (95% confidence level) between 2009 and 2010

Green : 2010 is significantly higher than 2009
Red : 2010 is significantly lower than 2009



Only positive significant differences (95% confidence level) with the total UK 2010

Here, 41% is significantly higher than 36%



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2. Detailed results

■ Europeans are continuing to alter their relationship with cars and seem increasingly willing to give up ownership of their own car

- ✓ As was the case in 2009, around 90% have altered their driving habits for cost-related reasons
- ✓ 39% go as far as considering giving up at least one of their cars or doing so in the next 12 months. In urban centres over 200,000 inhabitants, 45% of drivers are considering this solution.
- ✓ Within this context, the principle of carsharing (along the lines of the self-service bicycle system) would seem to have great potential: 57% of drivers would be more likely to rent a car, and particularly in urban centres over 200,000 inhabitants (vs. 63% of Europeans).

■ The changes in driver behaviour observed in 2009 were confirmed this year

As was the case in 2009, 9 out of 10 Europeans have changed their driving behaviour for economic reasons (the French and Portuguese have changed the most). In the majority of cases, they have opted to drive in a different way (not as fast) and to use their car less for short trips. In urban centres over 200,000 inhabitants, 70% of drivers use public transports when possible (vs. 55% of Europeans).

Environmental concerns are still important, although slightly less responsible for changes in attitudes among Europeans (8 out of 10 Europeans have changed their driving behaviour, no change c.f. 2009).

■ And are we on the road to abandoning car ownership?

As was the case last year, almost 40% of Europeans have considered or are considering giving up at least one of their household's vehicles. Beyond behavioural changes and claimed intentions, European drivers are apparently starting to rethink their relationship with car ownership:

- 58% claim that a car enables them to be free and independent (vs. 62% strongly agree in 2009), and particularly for exclusive owners (90%) and car lovers (89%).
- 57% say that they like to own their own car (a drop of around 4-point c.f. 2009), and particularly for exclusive owners (88%) and car lovers (89%).

Within this context, four countries seem particularly in the forefront of this trend: the UK, Germany, Belgium and Portugal. France, Italy and Spain are still somewhat lagging in relation to these changes.

- Among those Europeans who are considering giving up their car, 1 out of 2 would use rental to replace their vehicle. However, bringing the offer closer to the need by making it accessible and offering only what the client requires, is necessary:
 - To date, drivers who are not considering rental criticise the price (78%) and the non-practicality / complexity (almost 1 driver out of 2).
 - Within this context, **European drivers expressed a strong interest in rates based on the amount of time the car is used**, in hours or minutes (62% interest). That could advantageously influence perception of a price that is too high. Next, providing solutions that enable them to be free of physical rental agencies (geolocation of available vehicles, use of phones to directly access vehicles...), hence bringing the offer closer to the need, also generated interest (for more than 1 European out of 2).
 - **Among those who do not yet rent**, if an offer were to facilitate access to the vehicle and if payment were based on the amount of time the vehicle is used, almost **46%** of Europeans claim an intention to rent (compared to the 26% of intentions to rent that would otherwise be expected for a car hire).

■ Drivers' expectations in big urban centres : is car rental the future of big urban centres?

Within this context, the inhabitants of urban centres of over 200,000 inhabitants are showing themselves to be increasingly informed of these issues. Hence, and regardless of set-up difficulties, carsharing solutions seem to be destined for a degree of success.

- Indeed, the inhabitants of these urban areas already rent more cars for personal reasons (40% of renters over the past 12 months vs. 31% of Europeans).
- Rental is viewed as a potential source of savings by 41% of drivers living in agglomerations of over one million inhabitants (vs. 33% of Europeans).
- Finally, almost 1 out of every 2 drivers in the big cities is currently willing to give up one of the vehicles in his/her household (vs. 35% in Europe).

→ In order to guarantee success, the rental system will need to be practical (geolocation), should not involve going to a physical agency (vehicle is reserved and picked up using a mobile phone...) and rental for short time slots (by the hour or even by the minute) should be an option. If these conditions are provided, **63%** of the inhabitants of agglomerations of over 200,000 inhabitants would consider carsharing (and 57% in Europe).



Europcar Mobility Observatory – Executive Summary Germany

■ Alterations in driving habits among German drivers, changing since 2009

Although, as in 2009, 9 out of 10 Germans have altered their driving habits for economic reasons, fewer of them drive differently (65% vs. 70% in 2009) and less often (60% vs. 64%). On the other hand, more of them use public transportation (53% vs. 49% in 2009) and are trying carpooling (35% vs. 14% in 2009). And 9% of them are considering carsharing.

Environmental concerns are also bringing a change in driving habits for more than 8 out of 10 German drivers (as in Europe), which is once again expressed by great enthusiasm for carpooling (37% vs. 29% in Europe, a 21-point increase since 2009).

■ A strong relationship with the car, but which is changing

Germany is ranked as one of the European countries most reluctant to give up at least one of the household cars (28% c.f. 39% of Europeans). Among the drivers who are considering giving up their car, 86% would do so to save money (vs. 81% in Europe), due to the increase in car-related costs (for 70% of them vs. 76% in 2009), and because they could use other means of transport (for 54% vs. 63% in 2009).

Beyond behavioural changes and claimed intentions, the Germans remain attached to their car. However, their relationship with the car does seem to be changing:

- 90% of Germans like to have their own car (a 4-point drop since 2009)
- 66% would prefer to take their car for all their trips (a 5-point drop since 2009).
- An increasing number of them also think that rental costs less than having your own car (27% vs. 23% in 2009).



Europcar Mobility Observatory – Executive Summary Germany

■ **Among those Germans who are considering giving up their car, 43% would use rental to replace their vehicle.** This would be the second means of individual motorised transportation used, after carpooling (for 66% of Germans vs. 45% of Europeans, a figure rising 29 points since 2009).

■ **However, bringing the offer closer to the need by making it accessible and offering only what the client requires, is necessary :**

But the barriers to rental are still considerable: while most people do not wish to use rental to replace their car, this is primarily because :

- To date, drivers who are not considering rental criticise the price (for 79%, as in Europe), and the non-practicality / complexity (64% vs. 57% in Europe). Note also that 45% are bothered by the obligation to rent by the day.
- In order to attract more German drivers to rental, it is important that these barriers be removed by providing an offer that is better suited. For example, almost 6 out of 10 Germans would be interested in rental by the hour or minute, and almost half by vehicles that are directly available on the street.
- Among those who do not yet rent, if the rental offer were to facilitate access to the vehicle and payment were based on a by-the-hour or by-the-minute rate, 29% of Germans would consider renting (vs. 47% of Europeans).

■ Carsharing, the future of big urban centres?

Carsharing solutions seem to be generating interest among German drivers, particularly in the big urban centres (1 million inhabitants or more).

- Indeed, the inhabitants of these big urban areas are already more likely to have used classic rental over the past 12 months (53% have rented a vehicle vs. 38% of German drivers).
- In order to guarantee success, it would be better to provide remote access to the vehicle without having to go through a rental agency (50% of interested respondents in big urban areas vs. 41% of German drivers).

→ If these conditions are provided, then almost half of Germans living in cities of over 1 million inhabitants would consider renting a vehicle. In this respect, male drivers from the upper socio-professional categories are more favourable to this solution. Germany is still wary at the idea of giving up the car, but its driving habits are still very much in the process of changing. It is very open to new means of transport such as carpooling, which would suggest that carsharing could also have appeal.

These 5 groups can be described in the following way:

- **No choice dependents: “My own car - My only choice”**

More rural people for whom car gives them freedom and independence: using a car is for them a necessity if they want to stay mobile. However as they are price sensitive, they had to change significantly their driving habits for cost reasons. Car rental does not appear more practical and economical than owning a car.

- **Detached urbanites: “Life...also without a car”**

They are refractory to the car in general and they are larger to be supporters of banning cars in city centres. Most of them would consider giving up of their car. However they are mobile but they prefer to use other means of transport such public transport. Car rental would be less of an alternative for them.

- **Strategic nomads: “Looking for a new strategy of mobility”**

For cost and environment reasons, those drivers are considering giving up their car and are setting up a multimodal travel strategy using public transport, walking, two-wheels, car rental and sharing. Most of them have already experienced or considered car rental, which permits to adapt the car to their needs, is practical, ecological and economical.

- **Car lovers: “Loving cars - Changing cars”**

They mainly use their car for all of their journeys. Although they are attached to it, they are open to car rental, which is perceived like practical.

- **Exclusive owners: “My own car or nothing”**

They can only envisage mobility with their car and are totally opposed to abandoning vehicle ownership. Moreover they do not feel concern with environmental issues.

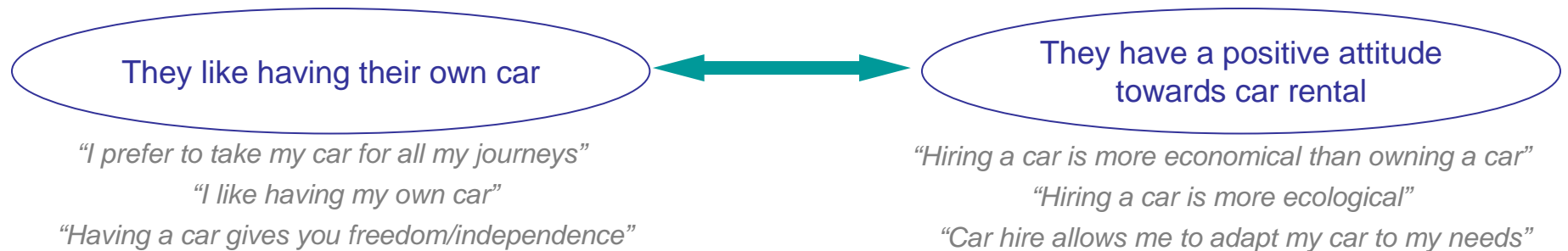
Europcar Mobility Observatory – Typology part

Mobility attitudes are structured around the following axis:

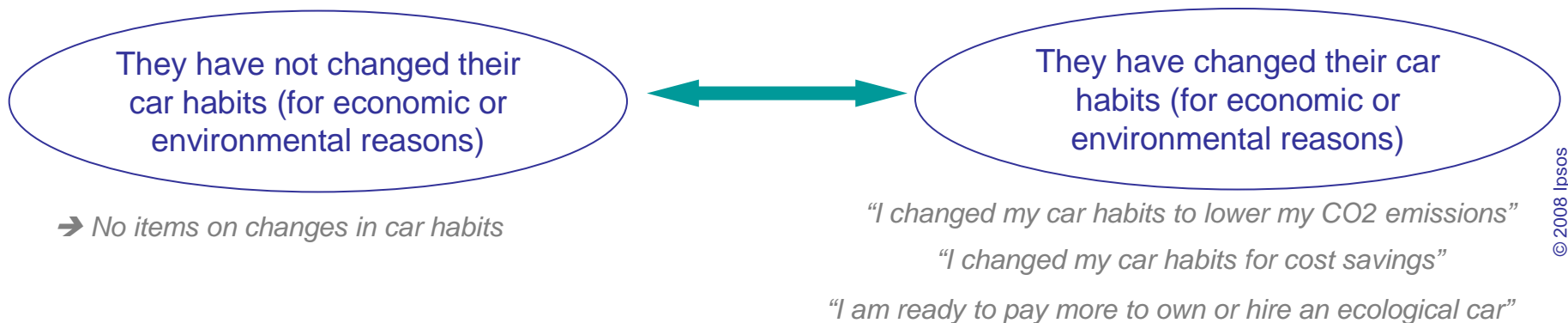
- Axis 1: Car attachment
- Axis 2: Attitude towards car hire

These axis are constructed according to an association of items. They explain 94% of the information :

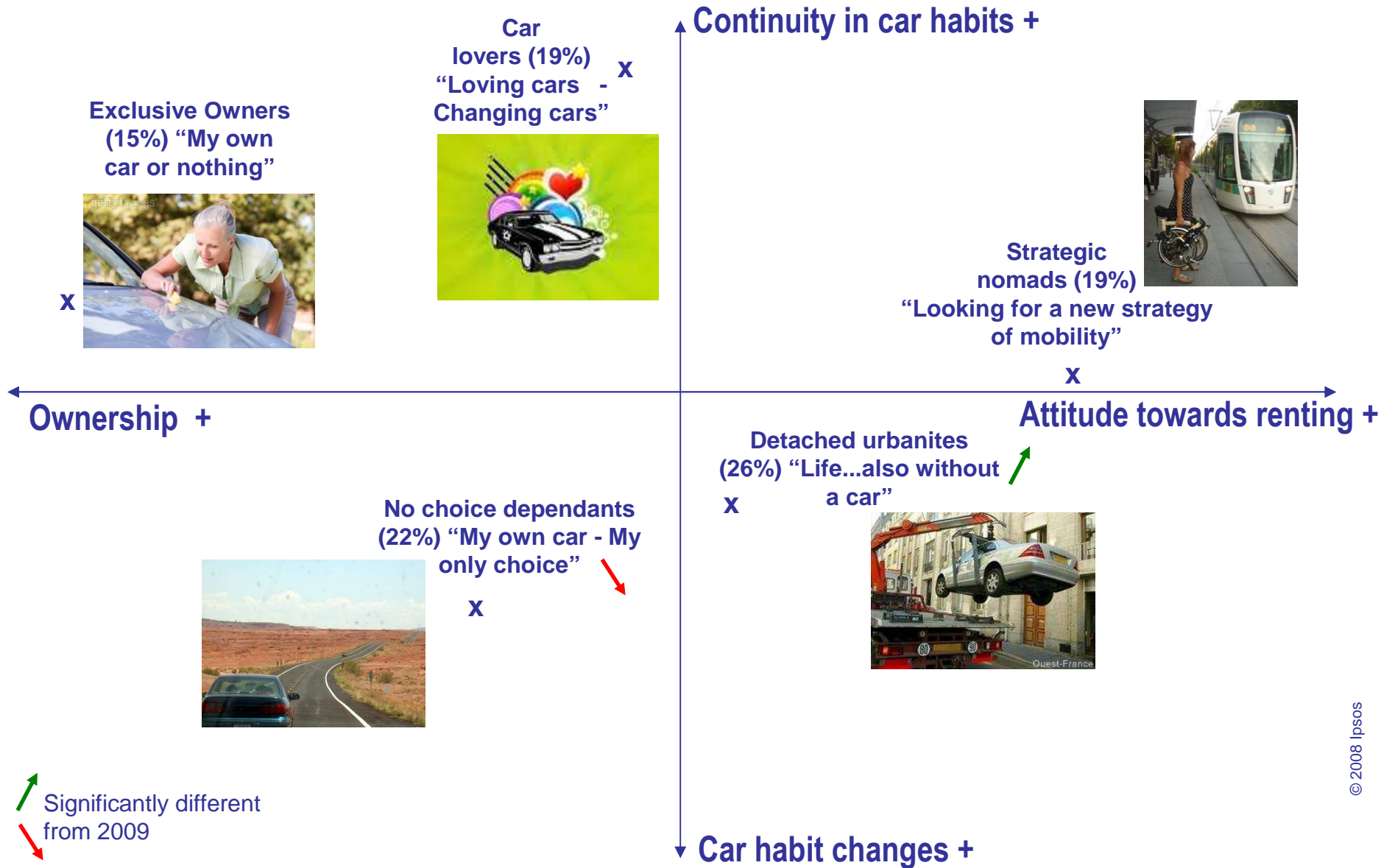
Axe 1 (horizontal) : explains 65% of variance



Axe 2 (vertical) : explains 29% of variance



Europcar Mobility Observatory – Typology part



Europcar Mobility Observatory – Typology part

- This table permits to summarize the profile of the groups:

	My own car – My only choice	Life... also without a car	Looking for a new strategy of mobility	Loving cars – Changing cars	My own car or nothing
Car hire attitude	--	-	++	+	--
Interested in carsharing	=	-	++	+	--
Car possession / attachment	++	-	--	++	++
Price sensitivity	++	=	+	-	--
Ecology sensitivity	+	=	+	-	--
Willing to pay for ecology	=	+	+	-	-
Experience of car rental during the last 12 months	-	=	++	+	--
Considered hiring a car in the next 12 months	-	=	++	+	--
Position	Inactive	+	+	+	Inactive
Age	+	=	-	-	+



No choice dependents

“My own car - My only choice” - (22%)



« I have no other choice but to use my car, but nowadays I have to alter my behaviour so I can keep it ».



As a result, I consider giving up my car less than other Europeans



However, this car costs me a lot and so I'm looking for ways to reduce my spending on this item

I'm attached to my car for the freedom and independence that it brings me



For that reason, I've altered my driving behaviour (I drive differently and I use my car less for short trips)



I'm not the European most concerned about ecology but it concerns me more than it did in 2009



For all these reasons, I'm not very interested in rental although I think about it more than I did in 2009

I consider renting less than other Europeans because I don't need to and I think it's too expensive.

Profile especially represented among:

- Women
- Older population
- Living more in a rural area
- Lower SPC and non-working
- Older vehicle
- Lower segment vehicle
- Low annual mileage drivers

Detached urbanites

“Life... also without a car” - (26%)



« My car is not indispensable to me, I'm considering giving it up. And I'm not looking to replace it ».



My car brings me no freedom or independence, and I'm not particularly attached to it (and even less so than in 2009)



As a result, I'm considering giving it up more than other Europeans

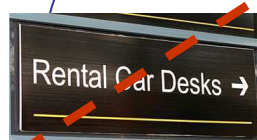


The financial aspect is not my main motivation

On the other hand I'm not trying to reduce my CO2 emissions or drive eco-friendly cars



All the same I've changed my travel habits, particularly through taking public transportation



For all these reasons, I have the same experience and the same intention to rent a car as other Europeans

I'm less interested in carsharing than other Europeans



Profile especially represented among:

- Men
- Of all ages
- All SPC
- Living in a large city
- Not owning a car

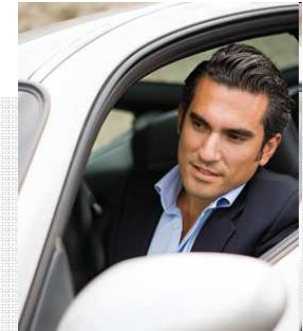


Strategic nomads

“Looking for a new strategy of mobility” - (19%)



« I'm looking for the most practical means of transport that best corresponds to my needs. But I won't make any concessions in relation to my freedom and my commitment to the environment ».



Profile especially represented among:

- Men
- Younger population
- Living in an urban area
- SPC+
- High annual mileage
- Owning 0 or 1 car
- New car

I'm attached to my car, particularly for the freedom and independence it brings me



But I'm still considering no longer owning one



It costs me a lot, the expenses seem too high

... and environmental ones too: I'm reducing my CO2 emissions and would be willing to pay more to have an eco-friendly car



As a result, I've altered my driving for economic reasons (notably to reduce the variable costs)...



I'm considering renting a car, and am more interested in carsharing than other Europeans



For all these reasons, I have a positive attitude to rental and already have greater experience than other Europeans



Car lovers

“Loving cars – Changing cars” - (19%)



« I like driving my car and I'm not considering giving it up. But I'm willing to use the car in other forms such as carsharing, that would enable me to try other cars ».



I'm attached to my car for the freedom and independence it brings me, and I like to change cars frequently



However, I'm not considering giving it up



Even if it costs me a lot,

I'm not concerned about ecology (notably a reduction in CO2 emissions), but I'd be interested in driving an eco-friendly car if it didn't cost me a lot



I haven't changed my driving habits



I'm more interested in rental and in particular carsharing than other Europeans



For all these reasons, I have a positive attitude towards rental and already have greater experience than other Europeans



Profile especially represented among:

- Younger population
- Living in an urban area
- Upper SPC
- Owning 2 or more cars
- High annual mileage



Exclusive owners “My own car or nothing” - (15%)



« My car enables me to be independent and free, I'm not considering either giving it up or driving another one ».

I'm very attached to the freedom and independence that my car brings me and I like having my own car



As a result, I'm not considering giving up my car

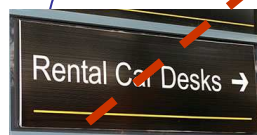


It doesn't cost me a lot,

I'm not concerned about ecology: I'm not trying to reduce my CO2 emissions, or to drive an eco-friendly car.



So I have no reason to change my driving habits



For all these reasons, I haven't tried car rental, and I don't intend to test it out.

I am unfavourable to rental, and to carsharing



Profile especially represented among:

- Women
- Older population
- Living in a rural area
- Non-working
- Low annual mileage
- Old car



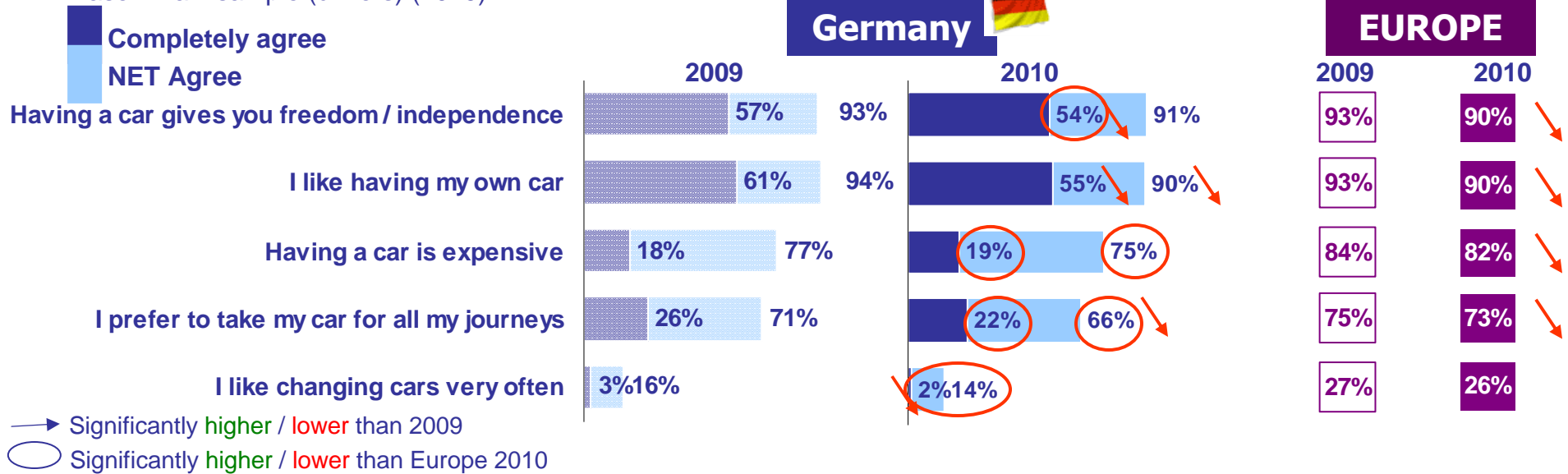
Europcar

- A. Are Europeans ready to give up one of their cars?**
- B. Have they changed their driving habits for cost or environmental reasons?**
 - 1. For cost reasons?**
 - 2. For environmental reasons?**
- C. Experience and attitudes with car rental**
 - 1. Experience with car rental**
 - 2. Attitudes towards car rental**
 - 3. Experience with carsharing**
- D. Complements**
- E. Sample description**

Attitudes regarding car attachment

Q29. You are going to read a list of statements regarding travel arrangements. For each of them, do you completely agree, somewhat agree, somewhat disagree or completely disagree?

Base : Main sample (drivers) (1019)



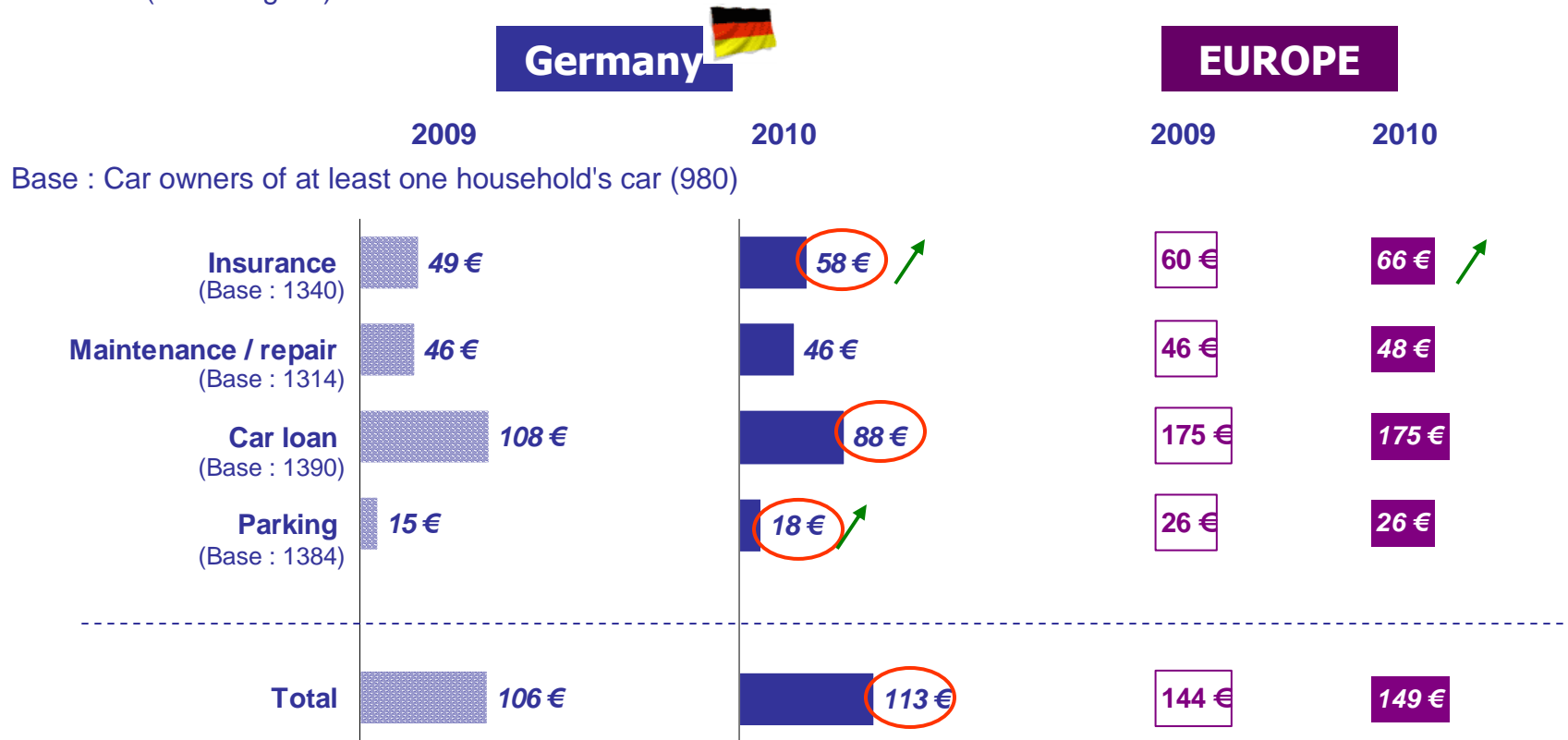
	2010												
	Germany	Gender		Age			Professional situation			City size		Have already hired a car	
	(1019)	Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
Having a car gives you freedom / independence	91%	89%	93%	89%	92%	92%	89%	93%	89%	91%	91%	94%	89%
I like having my own car	90%	89%	91%	86%	92%	93%	90%	91%	89%	92%	89%	91%	90%
Having a car is expensive	75%	76%	73%	77%	73%	74%	76%	74%	75%	76%	74%	80%	71%
I prefer to take my car for all my journeys	66%	67%	65%	63%	67%	68%	65%	68%	62%	71%	62%	65%	66%
I like changing cars very often	14%	16%	12%	18%	13%	8%	17%	14%	11%	14%	13%	22%	9%

○ Significantly higher than total Germany 2010

Monthly costs spent on the household car

Q8 Q8b. Excluding variable costs (such as petrol, tolls, etc), how much do you spend each month on the household's car you use the most for the following?

In Mean (excluding 0€)

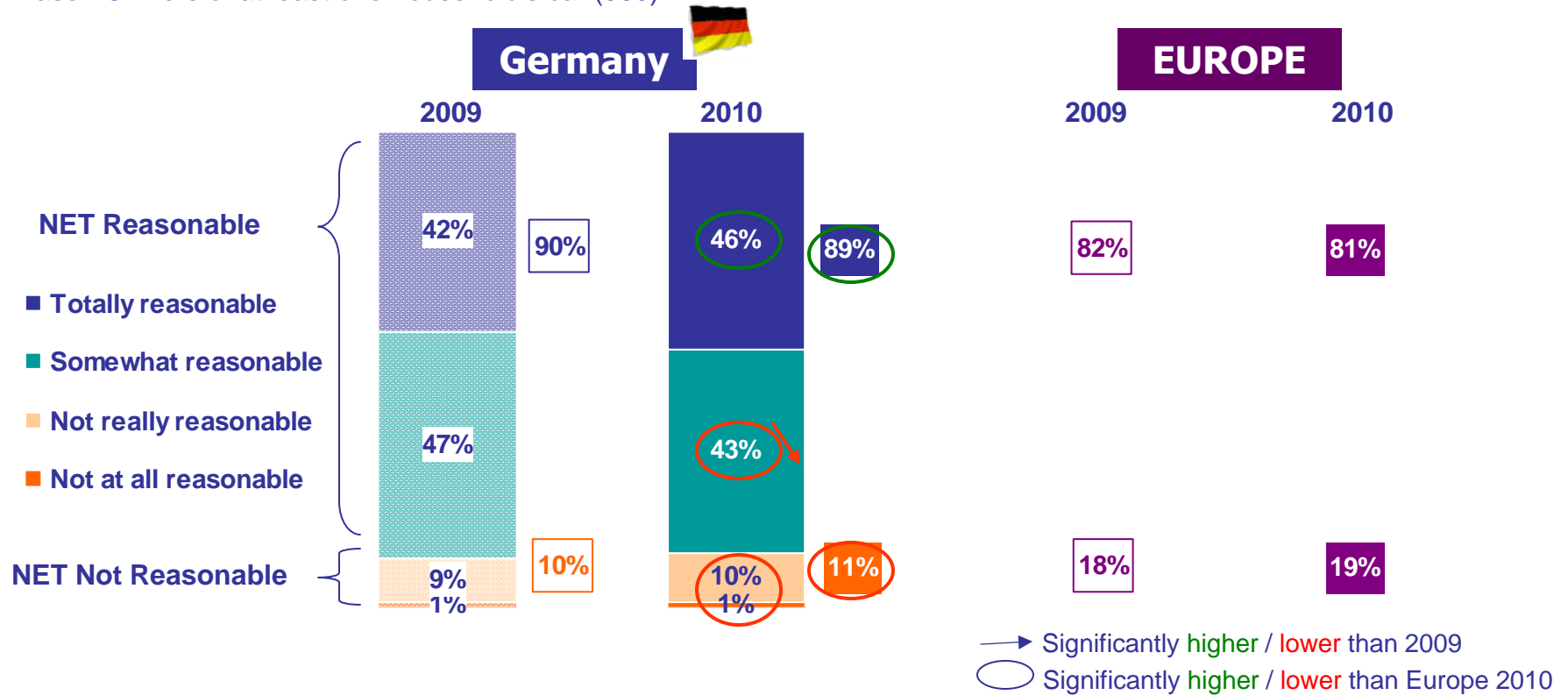


→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Perception of the monthly car cost

Q9. Based on your finances, is the cost of the household's car you use the most...

Base : Owners of at least one household's car (980)

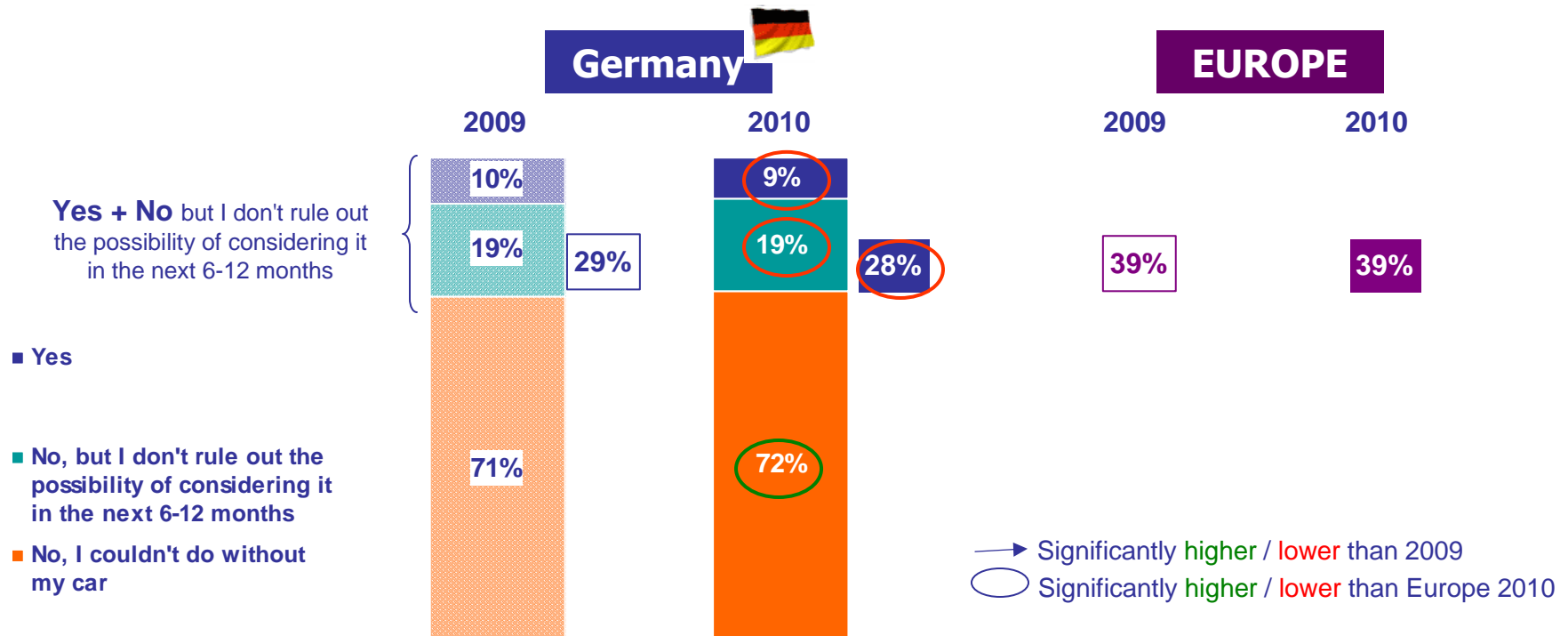


	2010		Germany			Gender			Age			Professional situation			City size		Have already hired a car	
	Germany		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No				
Base Brute	(980)		(486)	(494)	(316)	(473)	(191)	(240)	(476)	(264)	(418)	(562)	(367)	(613)				
NET Reasonable	89%	90%	88%	87%	89%	90%	90%	89%	87%	87%	90%	89%	89%					
NET Not reasonable	11%	10%	12%	13%	11%	10%	10%	11%	13%	13%	10%	11%	11%					

○ Significantly higher than total Germany 2010

Ever considered giving up one of the household cars

Q11. Have you ever considered giving up (and not replacing) your household's car / one of the household's cars?
 Base : Owners of at least one household's car (980)



2010	Germany		Age			Professional situation			City size		Have already hired a car	
	Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
(980)	(486)	(494)	(316)	(473)	(191)	(240)	(476)	(264)	(418)	(562)	(367)	(613)
28%	26%	29%	34%	27%	20%	28%	25%	32%	26%	29%	38%	22%

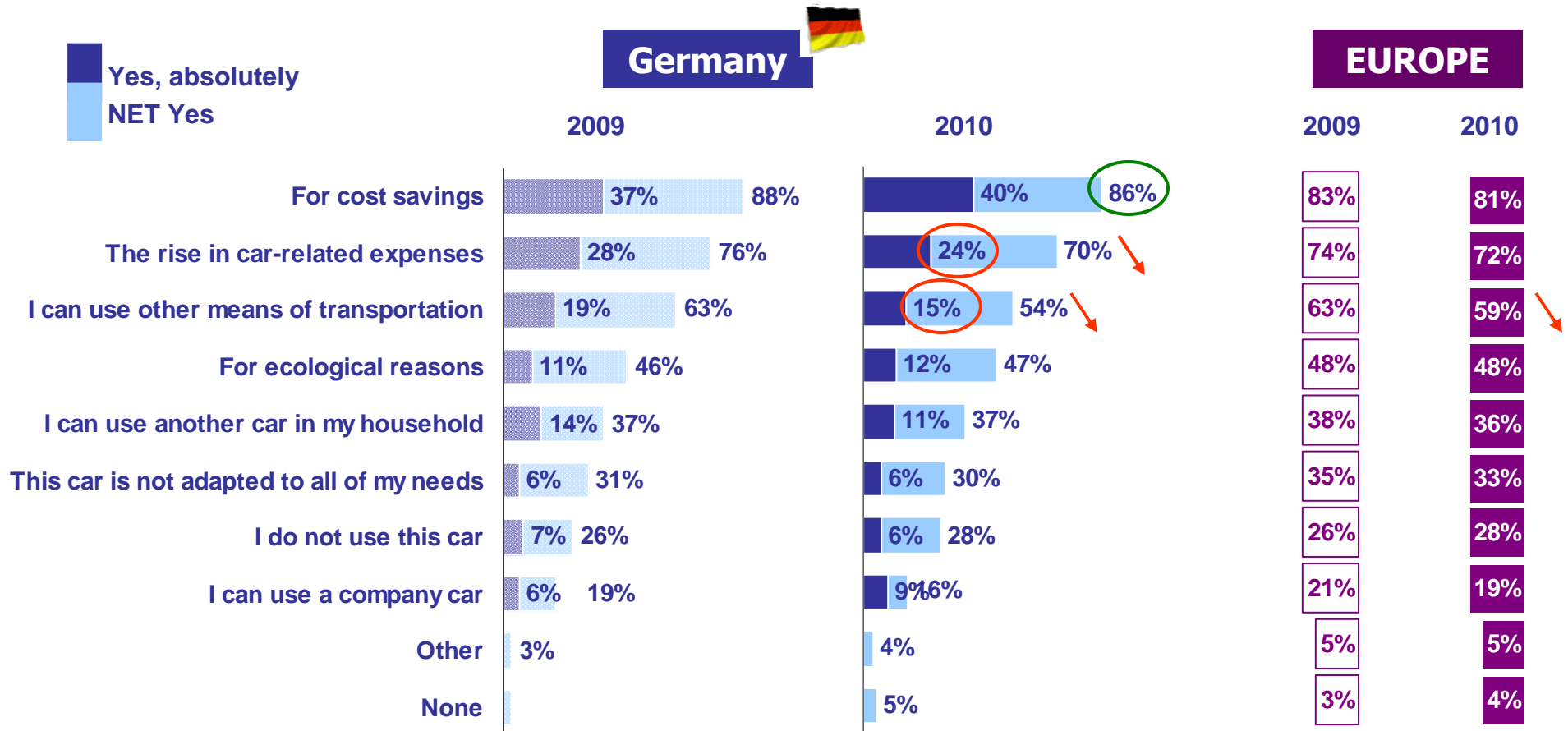
Yes + No but I don't rule out the possibility of considering it in the next 6-12 months

○ Significantly higher than total Germany 2010

Reason's for having ever considered giving up one of the household cars

Q12. For which reasons have you considered giving up one of the household's cars / would you consider giving up one of the household's cars in the next 6-12 months?

Base : Have ever considered giving up one of the household's cars (268)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Reason's for having ever considered giving up one of the household cars

Q12. For which reasons have you considered giving up one of the household's cars / would you consider giving up one of the household's cars in the next 6-12 months?

Base : Have ever considered giving up one of the household's cars (268)

Germany 

2010

NET Yes

	Germany (268)	Gender		Age			Professional situation		
		Men (126)	Women (142)	18-34 y.o. (105)	35-54 y.o. (125)	55 y.o. and more (38)	Upper class (68)	Lower class (118)	Inactive (82)
Base Brute	(268)	(126)	(142)	(105)	(125)	(38)	(68)	(118)	(82)
For cost savings	86%	83%	88%	88%	85%	79%	85%	88%	82%
The rise in car-related expenses	70%	66%	73%	69%	73%	58%	69%	73%	66%
I can use other means of transportation	54%	53%	54%	64%	50%	33%	54%	57%	49%
For ecological reasons	47%	47%	48%	51%	47%	36%	43%	47%	51%
I can use another car in my household	37%	41%	33%	37%	37%	33%	35%	38%	36%
This car is not adapted to all of my needs	30%	33%	27%	32%	28%	31%	35%	29%	26%
I do not use this car	28%	30%	26%	34%	25%	18%	30%	31%	22%
I can use a company car	16%	22%	10%	21%	14%	8%	25%	16%	8%
Other	4%	4%	3%	2%	2%	11%	6%	2%	4%
None	5%	5%	4%	4%	6%	3%	3%	4%	6%

Reason's for having ever considered giving up one of the household cars

Q12. For which reasons have you considered giving up one of the household's cars / would you consider giving up one of the household's cars in the next 6-12 months?

Base : Have ever considered giving up one of the household's cars (268)

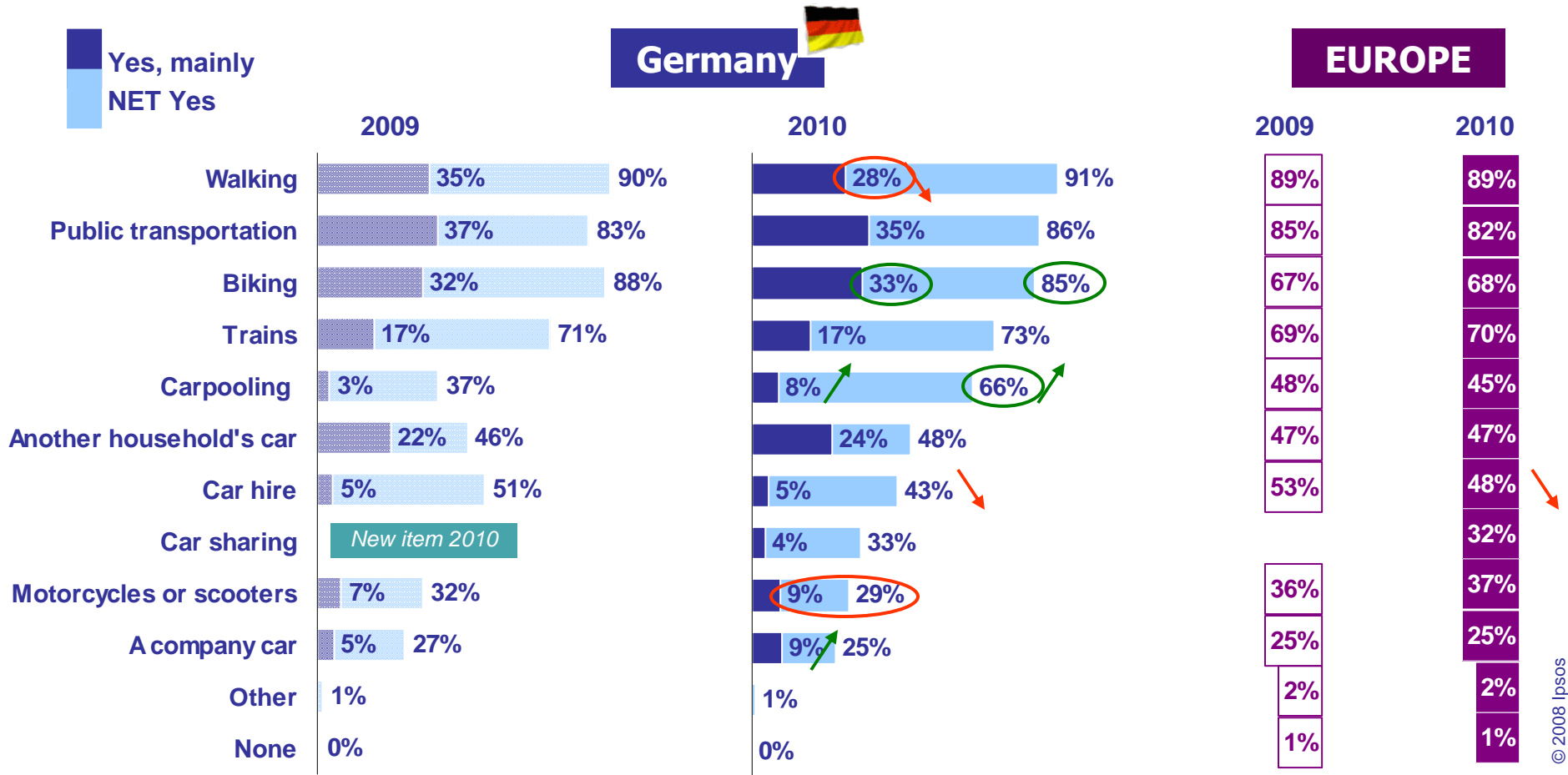
NET Yes	2010		City size		Have already hired a car	
	Germany	Germany	Rural towns	Urban cities	Yes	No
			(268)	(105)	(163)	(137)
Base Brute	(268)	(105)	(163)	(137)	(131)	
For cost savings	86%	90%	83%	86%	85%	
The rise in car-related expenses	70%	75%	66%	69%	71%	
I can use other means of transportation	54%	40%	62%	57%	50%	
For ecological reasons	47%	57%	42%	47%	48%	
I can use another car in my household	37%	49%	28%	36%	37%	
This car is not adapted to all of my needs	30%	35%	27%	34%	25%	
I do not use this car	28%	27%	29%	32%	24%	
I can use a company car	16%	14%	17%	25%	6%	
Other	4%	4%	3%	5%	3%	
None	5%	2%	6%	4%	6%	

 Significantly higher than total Germany 2010

Means of transportation used to replace the car given up

Q13. In the case you would give up your household's car / one of the household's cars, what means of transportation would you be using?

Base : Have ever considered giving up one of the household's cars (268)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Means of transportation used to replace the car given up

Q13. In the case you would give up your household's car / one of the household's cars, what means of transportation would you be using?

Base : Have ever considered giving up one of the household's cars (268)

Germany

2010

NET Yes

	Germany (268)	Gender		Age			Professional situation		
		Men (126)	Women (142)	18-34 y.o. (105)	35-54 y.o. (125)	55 y.o. and more (38)	Upper class (68)	Lower class (118)	Inactive (82)
Base Brute	(268)	(126)	(142)	(105)	(125)	(38)	(68)	(118)	(82)
Walking	91%	88%	95%	92%	90%	94%	90%	90%	95%
Public transportation	86%	84%	88%	93%	81%	85%	88%	86%	85%
Biking	85%	86%	84%	88%	88%	65%	90%	87%	78%
Trains	73%	71%	74%	84%	65%	64%	78%	68%	74%
Carpooling	66%	56%	75%	86%	52%	56%	63%	70%	65%
Another household's car	48%	49%	46%	48%	46%	53%	47%	51%	44%
Car hire	43%	52%	36%	43%	46%	34%	59%	43%	31%
Car sharing	33%	37%	29%	33%	36%	21%	47%	31%	23%
Motorcycles or scooters	29%	36%	23%	42%	23%	13%	33%	34%	19%
A company car	25%	34%	17%	36%	21%	7%	35%	27%	15%
Other	1%	2%				6%	1%		1%
None									

New item 2010

 Significantly higher than total Germany 2010

Means of transportation used to replace the car given up

Q13. In the case you would give up your household's car / one of the household's cars, what means of transportation would you be using?

Base : Have ever considered giving up one of the household's cars (268)

Germany

NET Yes

2010

	Germany (268)	City size		Have already hired a car	
		Rural towns (105)	Urban cities (163)	Yes (137)	No (131)
Base Brute	(268)	(105)	(163)	(137)	(131)
Walking	91%	90%	93%	90%	93%
Public transportation	86%	75%	93%	91%	81%
Biking	85%	86%	84%	90%	80%
Trains	73%	71%	74%	79%	66%
Carpooling	66%	67%	66%	70%	62%
Another household's car	48%	61%	39%	45%	50%
Car hire	43%	40%	46%	67%	20%
Car sharing	33%	33%	32%	44%	21%
Motorcycles or scooters	29%	35%	25%	38%	20%
A company car	25%	24%	26%	37%	13%
Other	1%	2%		2%	
None					

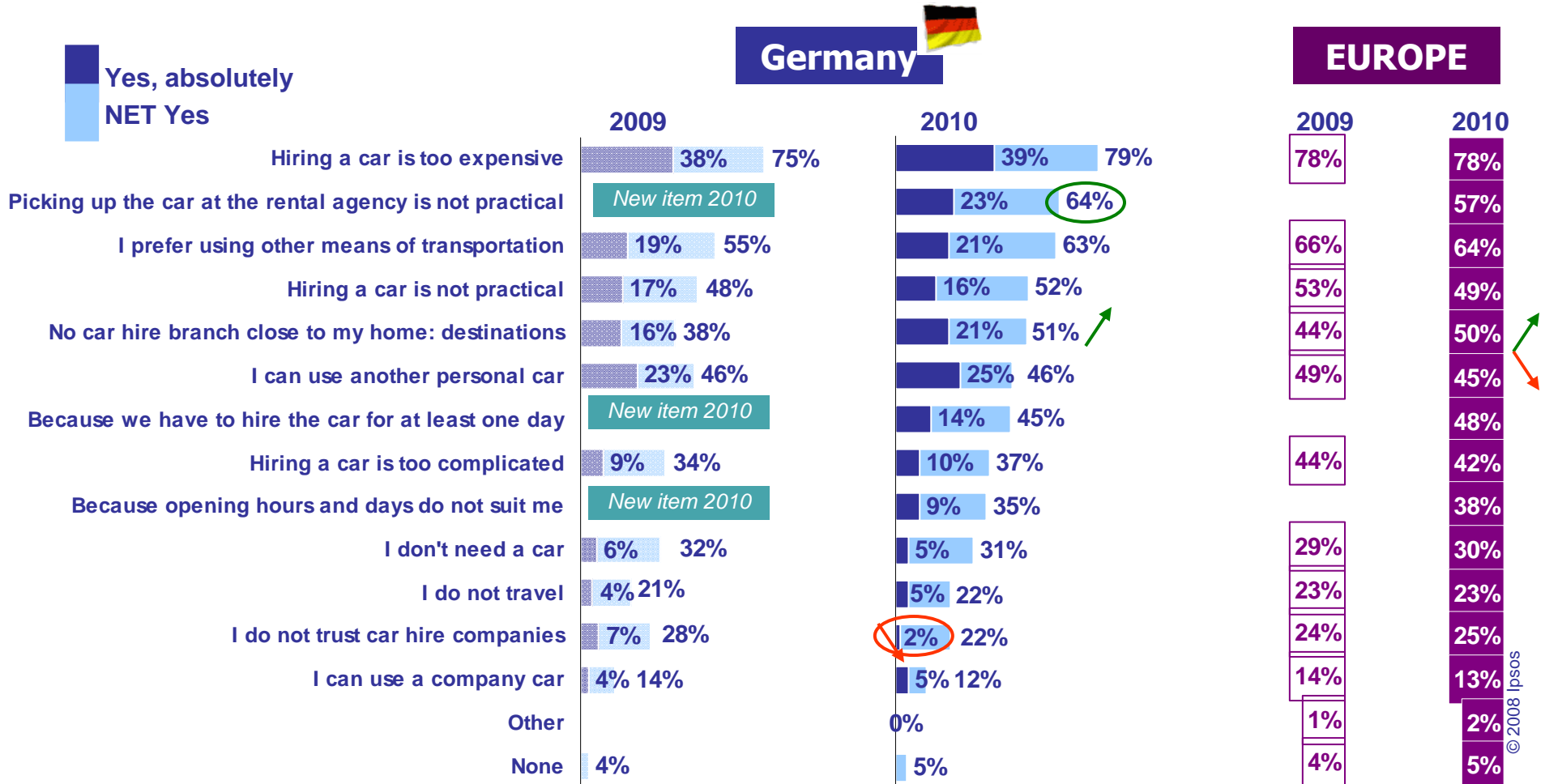
New item 2010

 Significantly higher than total Germany 2010

Reason's for not having ever considered hiring a car to replace this car

Q14. For which reasons would you not consider hiring a car if you gave up your household's car / one of the household's cars?

Base : Would not consider car hire or carsharing to replace one the household's cars (204)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Reason's for not having ever considered hiring a car to replace this car

Q14. For which reasons would you not consider hiring a car if you gave up your household's car / one of the household's cars?

Base : Would not consider car hire or carsharing to replace one the household's cars (204)

Germany

NET Yes	2010	Germany	Gender		Age			Professional situation		
			Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive
Base Brute		(204)	(90)	(114)	(80)	(92)	(32)	(44)	(89)	(71)
Hiring a car is too expensive		79%	72%	85%	88%	75%	70%	75%	82%	79%
Picking up the car at the rental agency is not practical	*	64%	63%	64%	65%	61%	69%	57%	66%	65%
I prefer using other means of transportation		63%	58%	67%	68%	59%	61%	51%	73%	59%
Hiring a car is not practical		52%	49%	54%	55%	47%	60%	39%	48%	65%
No car hire branch close to my home: destinations		51%	50%	52%	56%	46%	54%	48%	52%	52%
I can use another personal car		46%	50%	42%	42%	48%	47%	40%	50%	44%
Because we have to hire the car for at least one day	*	45%	44%	46%	44%	49%	38%	43%	48%	43%
Hiring a car is too complicated		37%	34%	39%	40%	33%	40%	36%	33%	42%
Because opening hours and days do not suit me	*	35%	35%	36%	35%	43%	15%	42%	38%	29%
I don't need a car		31%	30%	32%	27%	32%	37%	24%	30%	35%
I do not travel		22%	23%	21%	20%	22%	28%	13%	23%	25%
I do not trust car hire companies		22%	20%	23%	23%	21%	22%	11%	26%	22%
I can use a company car		12%	18%	8%	16%	13%		28%	13%	3%
Other										
None		5%	2%	6%	4%	6%	3%	5%	3%	6%

*New item 2010

 Significantly higher than total Germany 2010

Reason's for not having ever considered hiring a car to replace this car

Q14. For which reasons would you not consider hiring a car if you gave up your household's car / one of the household's cars?

Base : Would not consider car hire or carsharing to replace one the household's cars (204)

Germany

2010

NET Yes

	Germany (204)	City size		Have already hired a car	
		Rural towns (81)	Urban cities (123)	Yes (88)	No (116)
Base Brute					
Hiring a car is too expensive	79%	82%	78%	71%	86%
Picking up the car at the rental agency is not practical *	64%	70%	60%	56%	70%
I prefer using other means of transportation	63%	63%	63%	62%	64%
Hiring a car is not practical	52%	56%	49%	37%	63%
No car hire branch close to my home: destinations	51%	65%	42%	46%	55%
I can use another personal car	46%	60%	36%	41%	49%
Because we have to hire the car for at least one day *	45%	49%	43%	44%	46%
Hiring a car is too complicated	37%	42%	33%	25%	46%
Because opening hours and days do not suit me *	35%	40%	32%	34%	36%
I don't need a car	31%	24%	35%	25%	35%
I do not travel	22%	23%	21%	15%	27%
I do not trust car hire companies	22%	30%	16%	12%	29%
I can use a company car	12%	11%	13%	21%	6%
Other					
None	5%	1%	7%	6%	4%

*New item 2010

 Significantly higher than total Germany 2010



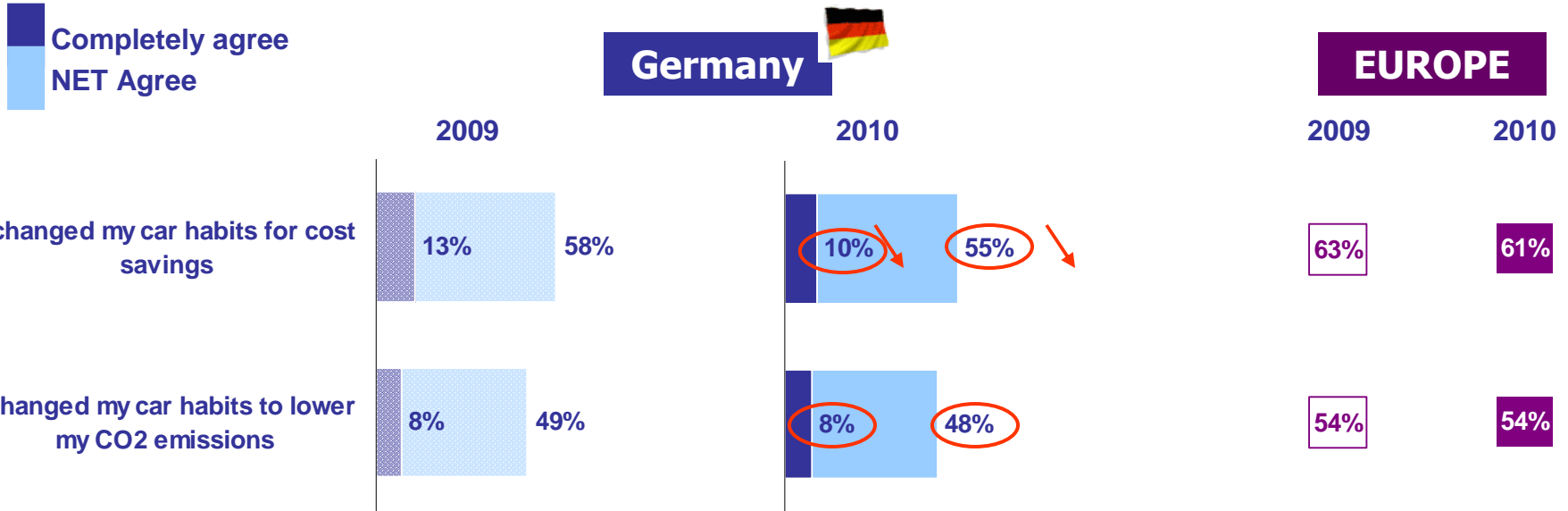
Europcar

- A. Are Europeans ready to give up one of their cars?
- B. Have they changed their driving habits for cost or environmental reasons?
 - 1. For cost reasons?
 - 2. For environmental reasons?
- C. Experience and attitudes with car rental
 - 1. Experience with car rental
 - 2. Attitudes towards car rental
 - 3. Experience with carsharing
- D. Complements
- E. Sample description

Changes in driving habits

Q29. You are going to read a list of statements regarding travel arrangements. For each of them, do you completely agree, somewhat agree, somewhat disagree or completely disagree?

Base : Main sample (drivers) (1019)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

% Agree	2010												
	Germany	Gender		Age			Professional situation			City size		Have already hired a car	
			Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
I changed my car habits for cost savings	55%	54%	55%	51%	54%	62%	58%	51%	58%	59%	51%	62%	50%
I changed my car habits to lower my CO2 emissions	48%	47%	50%	43%	48%	58%	51%	45%	51%	53%	45%	53%	46%

○ Significantly higher than total Germany 2010



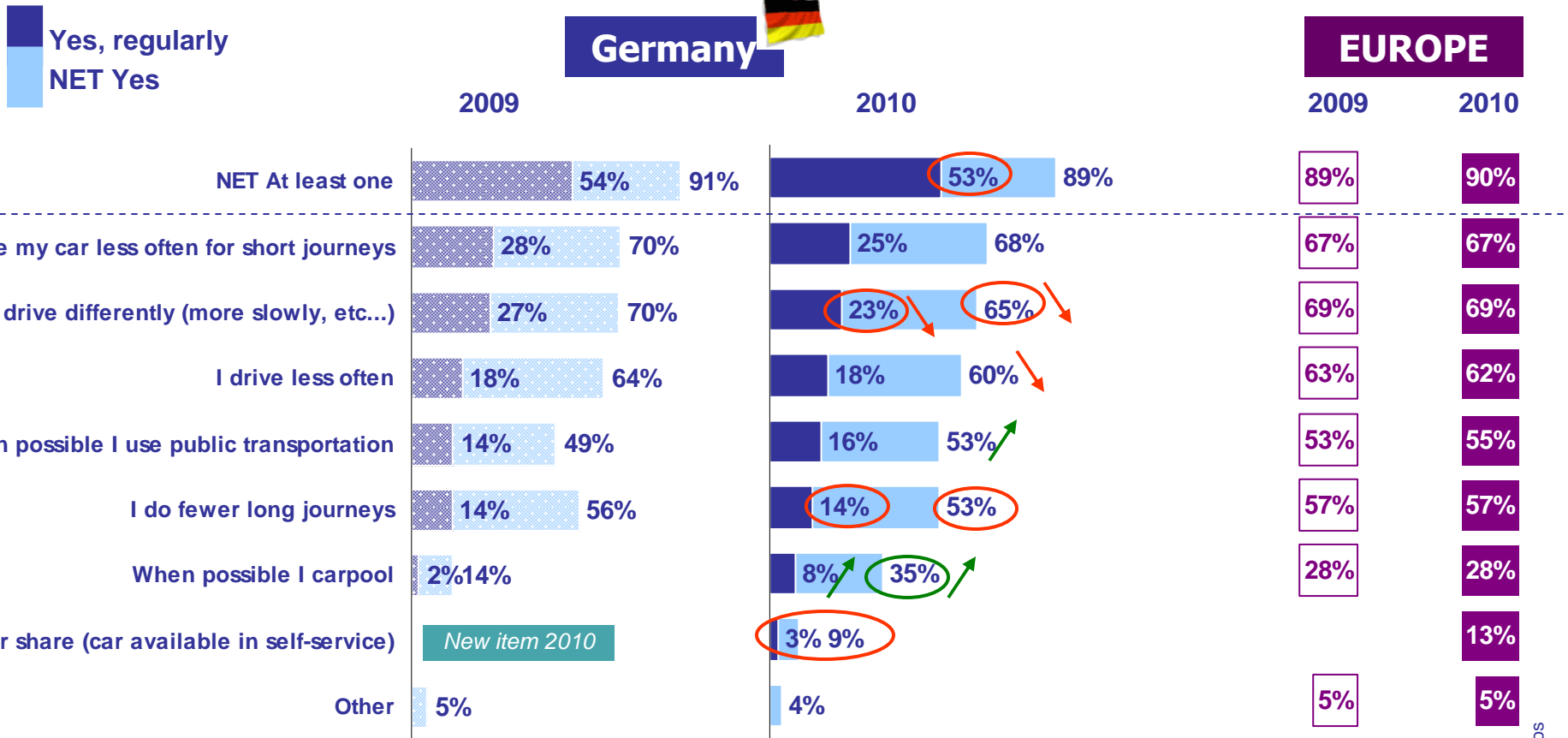
Europcar

- A. Are Europeans ready to give up one of their cars?
- B. Have they changed their driving habits for cost or environmental reasons?
 - 1. For cost reasons?
 - 2. For environmental reasons?
- C. Experience and attitudes with car rental
 - 1. Experience with car rental
 - 2. Attitudes towards car rental
 - 3. Experience with carsharing
- D. Complements
- E. Sample description

Changes in driving habits for cost reasons

Q10. Have you recently changed your habits in terms of using your car for cost reasons?

Base : Main sample (drivers) (1019)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Changes in driving habits for cost reasons

Q10. Have you recently changed your habits in terms of using your car for cost reasons?

Base : Main sample (drivers) (1019)

Germany 

NET Yes	2010	Germany	Gender		Age			Professional situation		
			Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive
Base Brute		(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)
NET At least one		89%	87%	91%	90%	89%	88%	87%	89%	90%
I use my car less often for short journeys		68%	65%	70%	65%	69%	67%	66%	67%	70%
I drive differently (more slowly, etc...)		65%	63%	66%	62%	64%	70%	63%	65%	65%
I drive less often		60%	55%	65%	59%	59%	66%	54%	59%	66%
When possible I use public transportation		53%	53%	53%	61%	47%	53%	50%	50%	60%
I do fewer long journeys		53%	50%	55%	49%	53%	59%	52%	52%	55%
When possible I carpool		35%	31%	39%	52%	27%	26%	32%	34%	40%
I car share (car available in self-service)	*	9%	8%	10%	15%	7%	4%	12%	8%	8%
Other		4%	5%	3%	3%	5%	4%	2%	5%	4%

*New item 2010

 Significantly higher than total Germany 2010

Changes in driving habits for cost reasons

Q10. Have you recently changed your habits in terms of using your car for costs reasons?

Base : Main sample (drivers) (1019)

Germany 

2010

NET Yes

	Germany (1019)	City size		Have already hired a car	
		Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute					
NET At least one	89%	89%	89%	91%	88%
I use my car less often for short journeys	68%	70%	66%	67%	68%
I drive differently (more slowly, etc...)	65%	70%	61%	67%	63%
I drive less often	60%	64%	57%	63%	58%
When possible I use public transportation	53%	43%	60%	62%	47%
I do fewer long journeys	53%	55%	51%	54%	52%
When possible I carpool	35%	34%	36%	44%	30%
I car share (car available in self-service) *	9%	8%	10%	18%	4%
Other	4%	3%	4%	4%	4%

*New item 2010

 Significantly higher than total Germany 2010



Europcar

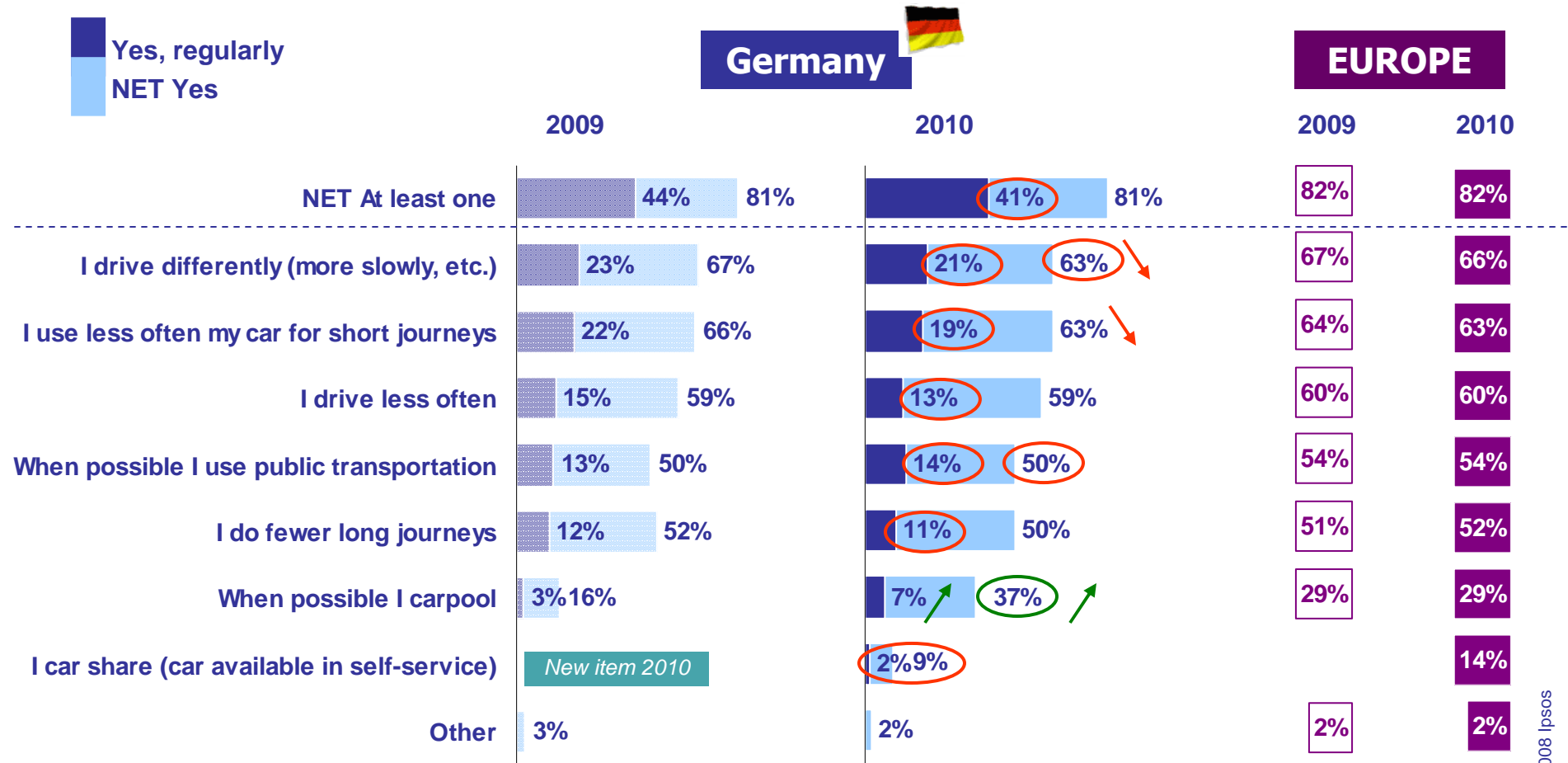
- A. Are Europeans ready to give up one of their cars?
- B. Have they changed their driving habits for cost or environmental reasons?
 - 1. For cost reasons?
 - 2. For environmental reasons?
- C. Experience and attitudes with car rental
 - 1. Experience with car rental
 - 2. Attitudes towards car rental
 - 3. Experience with carsharing
- D. Complements
- E. Sample description

Changes in driving habits for ecological reasons

Q25. Have you recently changed your car usage habits for ecological reasons?

Base : Main sample (drivers) (1019)

Yes, regularly
NET Yes



→ Significantly higher / lower than 2009
○ Significantly higher / lower than Europe 2010

Changes in driving habits for ecological reasons

Q25. Have you recently changed your car usage habits for ecological reasons?

Base : Main sample (drivers) (1019)

Germany



NET Yes

2010

	Germany (1019)	Gender		Age			Professional situation		
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)
NET At least one	81%	78%	83%	75%	83%	85%	80%	82%	80%
I drive differently (more slowly, etc.)	63%	63%	63%	58%	63%	70%	63%	64%	61%
I use less often my car for short journeys	63%	61%	65%	58%	64%	67%	62%	63%	63%
I drive less often	59%	55%	62%	52%	60%	67%	56%	58%	63%
When possible I use public transportation	50%	50%	50%	52%	47%	52%	47%	49%	54%
I do fewer long journeys	50%	49%	52%	43%	52%	58%	53%	48%	52%
When possible I carpool	37%	34%	39%	48%	33%	28%	36%	36%	39%
I car share (car available in self-service) *	9%	10%	9%	14%	9%	3%	13%	8%	9%
Other	2%	2%	3%	2%	3%	2%	2%	3%	2%

*New item 2010

 Significantly higher than total Germany 2010

Changes in driving habits for ecological reasons

Q25. Have you recently changed your car usage habits for ecological reasons?

Base : Main sample (drivers) (1019)

Germany



NET Yes

2010

	Germany (1019)	City size		Have already hired a car	
		Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute					
NET At least one	81%	83%	79%	83%	79%
I drive differently (more slowly, etc.)	63%	69%	58%	66%	61%
I use less often my car for short journeys	63%	66%	60%	63%	62%
I drive less often	59%	62%	57%	63%	56%
When possible I use public transportation	50%	44%	54%	57%	45%
I do fewer long journeys	50%	52%	49%	53%	49%
When possible I carpool	37%	39%	35%	43%	33%
I car share (car available in self-service) *	9%	8%	10%	19%	4%
Other	2%	2%	3%	2%	2%

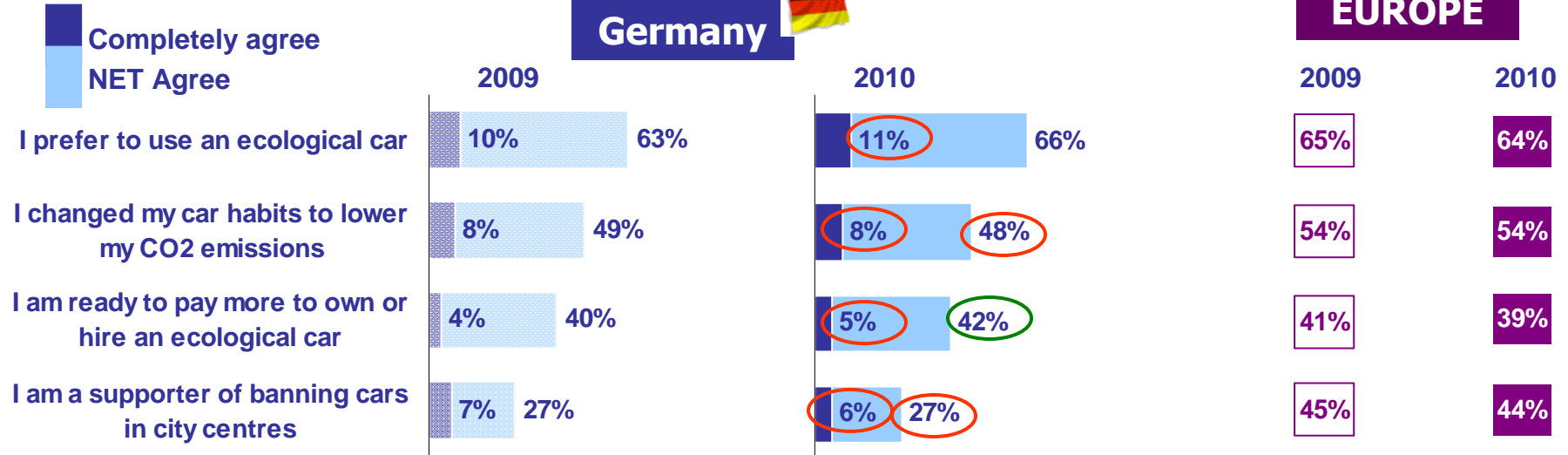
*New item 2010

 Significantly higher than total Germany 2010

Attitudes regarding the environment

Q29. You are going to read a list of statements regarding travel arrangements. For each of them, do you completely agree, somewhat agree, somewhat disagree or completely disagree?

Base : Main sample (drivers) (1019)



→ Significantly higher / lower than 2009

○ Significantly higher / lower than Europe 2010

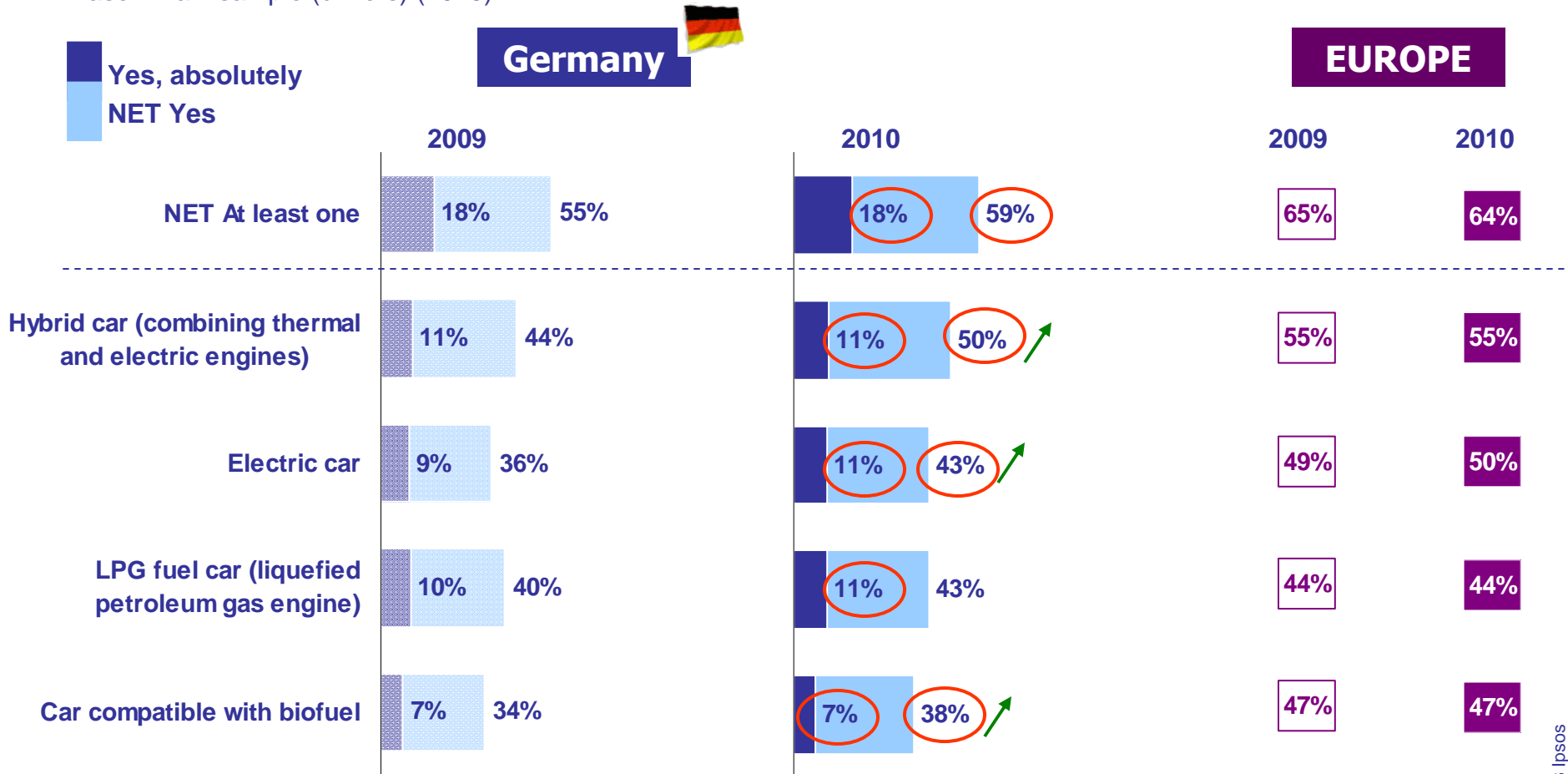
% Agree	2010		Age			Professional situation			City size		Have already hired a car	
	Germany	Gender	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
Base Brute	(1019)	Men (509) / Women (510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
I prefer to use an ecological car	66%	68% / 64%	59%	70%	67%	72%	65%	62%	72%	61%	68%	64%
I changed my car habits to lower my CO2 emissions	48%	47% / 50%	43%	48%	58%	51%	45%	51%	53%	45%	53%	46%
I am ready to pay more to own or hire an ecological car	42%	46% / 38%	42%	44%	38%	47%	42%	39%	45%	40%	49%	38%
I am a supporter of banning cars in city centres	27%	26% / 28%	27%	26%	29%	28%	25%	31%	30%	25%	33%	24%

○ Significantly higher than total Germany 2010

Interest in hiring ecological cars

Q27. Would you be interested in hiring one of these ecological cars?

Base : Main sample (drivers) (1019)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Interest in hiring ecological cars

Q27. Would you be interested in hiring one of these ecological cars?

Base : Main sample (drivers) (1019)

Germany 

% Yes

2010

	Germany (1019)	Gender		Age			Professional situation		
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)
Base Brute									
NET At least one	59%	63%	54%	65%	59%	45%	67%	57%	53%
Hybrid car (combining thermal and electric engines)	50%	53%	46%	56%	51%	34%	58%	49%	44%
Electric car	43%	46%	39%	48%	43%	31%	51%	40%	40%
LPG fuel car (liquefied petroleum gas engine)	43%	44%	42%	52%	43%	27%	48%	44%	37%
Car compatible with biofuel	38%	40%	37%	47%	40%	19%	42%	40%	33%

 Significantly higher than total Germany 2010

Interest in hiring ecological cars

Q27. Would you be interested in hiring one of these ecological cars?

Base : Main sample (drivers) (1019)

Germany



% Yes

2010

	Germany (1019)	City size		Have already hired a car	
		Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute					
NET At least one	59%	60%	57%	73%	49%
Hybrid car (combining thermal and electric engines)	50%	49%	50%	63%	41%
Electric car	43%	43%	43%	55%	35%
LPG fuel car (liquefied petroleum gas engine)	43%	45%	41%	56%	35%
Car compatible with biofuel	38%	40%	37%	51%	30%

 Significantly higher than total Germany 2010

Attitudes regarding the environment

Q29b. Here is a list of statements concerning the environment. For each of these statements, could you tell me if you completely agree, somewhat agree, somewhat disagree or completely disagree ?

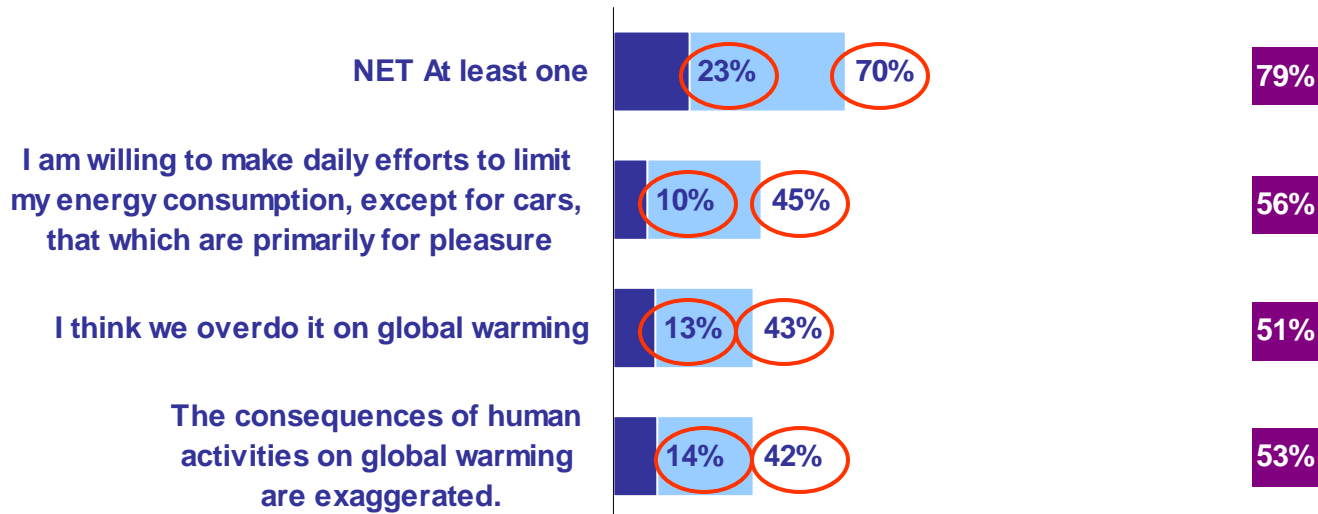
Base : Main sample (drivers) (1019)

New question 2010

Completely agree
NET Agree

Germany 

EUROPE



 Significantly higher / lower than Europe 2010

Attitudes regarding the environment

Q29b. Here is a list of statements concerning the environment. For each of these statements, could you tell me if you completely agree, somewhat agree, somewhat disagree or completely disagree ?

Base : Main sample (drivers) (1019)

New question 2010

Germany



2010

	Germany (1019)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
NET At least one	70%	72%	68%	70%	70%	69%	67%	71%	71%	69%	70%	74%	67%
I am willing to make daily efforts to limit my energy consumption, except for cars, that which are primarily for pleasure	45%	45%	44%	44%	46%	44%	45%	43%	47%	43%	46%	50%	42%
I think we overdo it on global warming	43%	47%	38%	45%	41%	43%	42%	44%	41%	44%	42%	47%	40%
The consequences of human activities on global warming are exaggerated.	42%	46%	39%	43%	40%	47%	40%	43%	44%	45%	40%	45%	41%

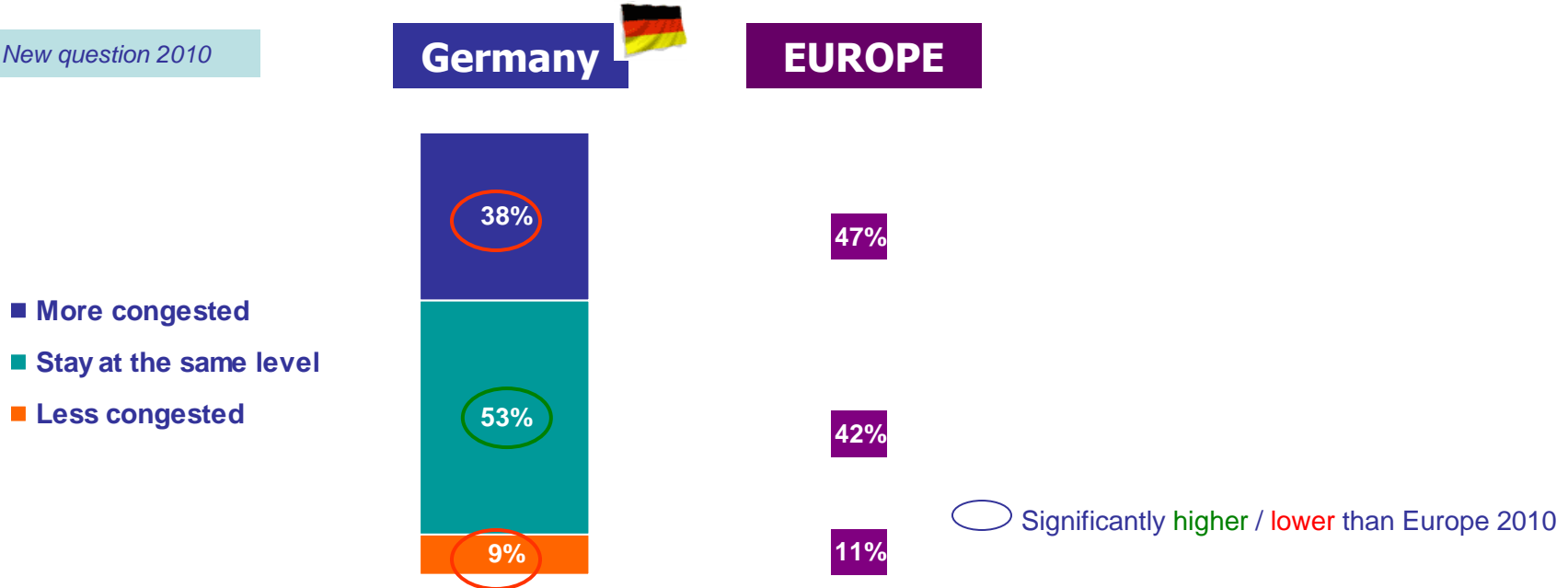
 Significantly higher than total Germany 2010

Attitudes regarding congestion of urban areas in the future

Q29c. In the future, do you think that urban areas will be more congested, will stay at the same level, or will be less congested ?

Base : Main sample (drivers) (1019)

New question 2010



2010

	Germany (1019)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
More congested	38%	42%	35%	32%	42%	39%	43%	39%	33%	40%	37%	40%	37%
Stay at the same level	53%	47%	58%	57%	53%	46%	50%	53%	54%	50%	55%	52%	53%
Less congested	9%	11%	7%	11%	5%	16%	7%	8%	13%	9%	9%	8%	10%

 Significantly higher than total Germany 2010



Europcar

- A. Are Europeans ready to give up one of their cars?
- B. Have they changed their driving habits for cost or environmental reasons?
 - 1. For cost reasons?
 - 2. For environmental reasons?
- C. Experience and attitudes with car rental
 - 1. Experience with car rental
 - 2. Attitudes towards car rental
 - 3. Experience with carsharing
- D. Complements
- E. Sample description



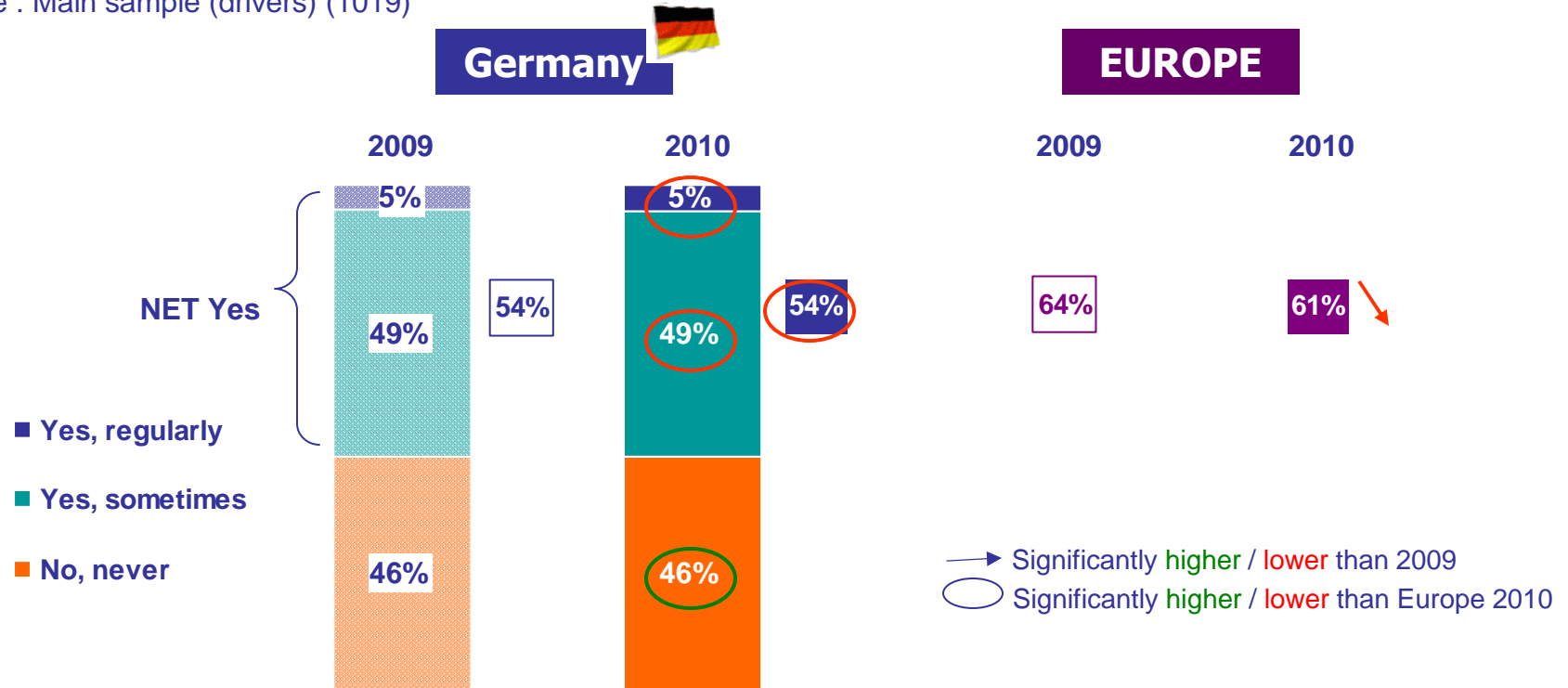
Europcar

- A. Are Europeans ready to give up one of their cars?
- B. Have they changed their driving habits for cost or environmental reasons?
 - 1. For cost reasons?
 - 2. For environmental reasons?
- C. Experience and attitudes with car rental
 - 1. Experience with car rental
 - 2. Attitudes towards car rental
 - 3. Experience with carsharing
- D. Complements
- E. Sample description

Ever considered car rental

Q7. Have you ever considered hiring a car?

Base : Main sample (drivers) (1019)



	2010		Gender			Age			Professional situation			City size		Have already hired a car	
	Germany		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No	
Base Brute	(1019)		(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)	
NET Yes	54%	60%	48%	55%	55%	47%	65%	52%	48%	51%	56%	86%	34%		

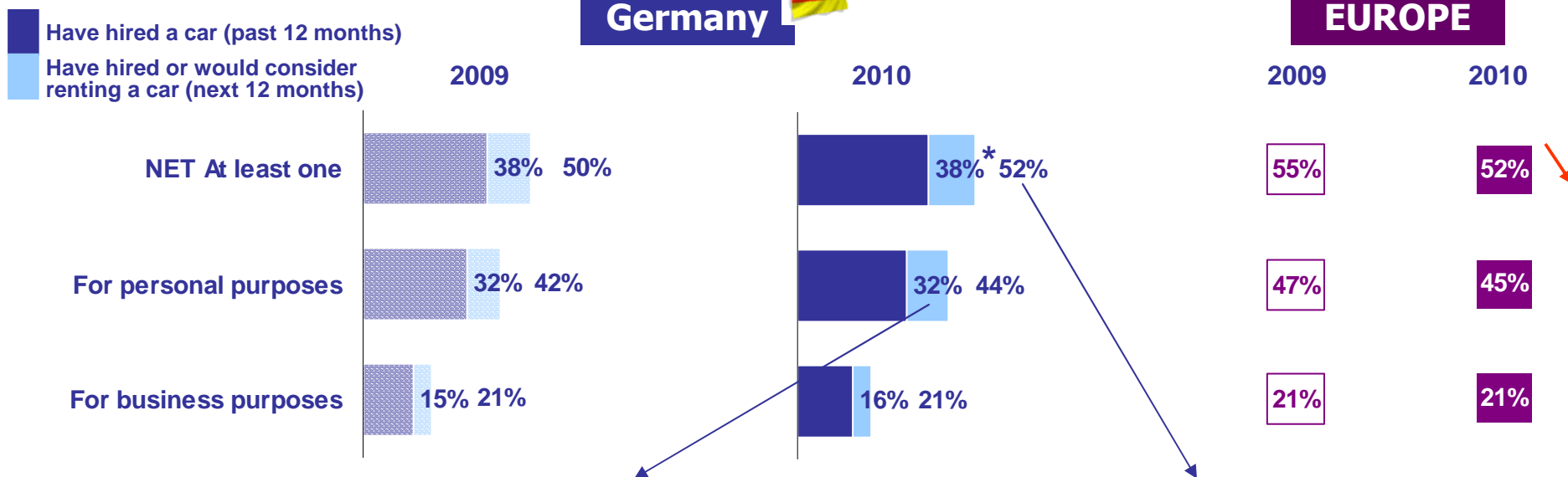
○ Significantly higher than total Germany 2010

Experience of car rental in the past or intention in the future

Q15. Over the 12 last months, have you hired a car even for very short periods for personal or business purposes?

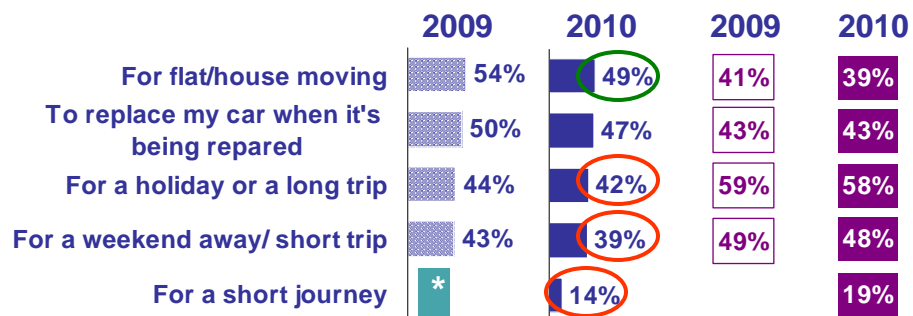
Q17. Would you consider hiring a car in the next 12 months for personal or business purposes?

Base : Main sample (drivers) (1019)



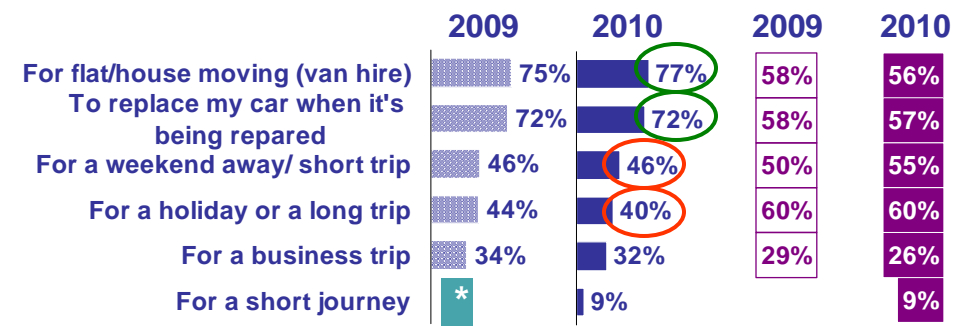
Q16b. For which personal purposes have you hired a car over the 12 last months?

Base : Have hired a car for personal purposes (327)



Q18a. For which occasions would you consider hiring a car in the next 12 months?

Base : Have not hired a car but would consider doing it in the next 12 months (137)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

*New item 2010


* 53% have rented a car in urban centres of over 1 million inhabitants

Experience of car rental in the past or intention in the future

Q15. Over the 12 last months, have you hired a car even for very short periods for personal/ business purposes?

Q17. Would you consider hiring a car in the next 12 months for personal or business purposes?

Base : Main sample (drivers) (1019)


	Germany (1019)	Gender		Age			Professional situation		
		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive
Germany  2010									
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)
Q15+Q17 Have hired or would consider hiring a car									
NET At least one	52%	56%	47%	58%	51%	43%	66%	49%	44%
For personal purposes	44%	46%	42%	49%	43%	37%	53%	41%	41%
For business purposes	21%	29%	14%	26%	22%	11%	36%	21%	9%
Q16b. Reason(s) for having hired a car for personal purposes									
Base Brute	(327)	(177)	(150)	(116)	(162)	(49)	(104)	(154)	(69)
For flat/house moving	49%	44%	54%	58%	49%	23%	51%	48%	46%
To replace my car when it's being repaired	47%	48%	46%	44%	49%	48%	54%	49%	31%
For a holiday or a long trip	42%	44%	38%	53%	36%	35%	46%	42%	35%
For a weekend away/ short trip	39%	43%	35%	49%	37%	22%	44%	41%	29%
For a short journey	14%	14%	15%	24%	11%	4%	17%	13%	13%
	<i>New item 2010</i>								
Q18a. Reason(s) for considering hiring a car in the 12 next months									
Base Brute	(137)	(67)	(70)	(54)	(57)	(26)	(34)	(56)	(47)
For flat/house moving (van hire)	77%	69%	83%	87%	76%	54%	84%	77%	71%
To replace my car when it's being repaired	72%	66%	79%	71%	78%	62%	78%	77%	63%
For a weekend away/ short trip	46%	48%	43%	52%	47%	29%	54%	37%	49%
For a holiday or a long trip	40%	40%	39%	43%	36%	40%	43%	37%	40%
For a business trip	32%	31%	32%	37%	35%	15%	29%	45%	19%
For a short journey	9%	11%	8%	11%	10%	4%	14%	6%	9%
	<i>New item 2010</i>								

 Significantly higher than total Germany 2010

Experience of car rental in the past or intention in the future

Q15. Over the 12 last months, have you hired a car even for very short periods for personal/ business purposes?
 Q17. Would you consider hiring a car in the next 12 months for personal or business purposes?

Base : Main sample (drivers) (1019)

Germany 	2010	Germany (1019)	City size		Have already hired a car	
			Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Q15+Q17 Have hired or would consider hiring a car						
NET At least one		52%	49%	54%	100%	22%
For personal purposes		44%	41%	46%	84%	19%
For business purposes		21%	21%	21%	42%	9%
Q16b. Reason(s) for having hired a car for personal purposes						
Base Brute		(327)	(119)	(208)	(327)	
For flat/house moving		49%	44%	51%	49%	
To replace my car when it's being repaired		47%	55%	42%	47%	
For a holiday or a long trip		42%	40%	43%	42%	
For a weekend away/ short trip		39%	32%	44%	39%	
For a short journey	<i>New item 2010</i>	14%	14%	14%	14%	
Q18a. Reason(s) for considering hiring a car in the 12 next months						
Base Brute		(137)	(64)	(73)	(137)	
For flat/house moving (van hire)		77%	79%	75%	77%	
To replace my car when it's being repaired		72%	80%	65%	72%	
For a weekend away/ short trip		46%	46%	45%	46%	
For a holiday or a long trip		40%	40%	39%	40%	
For a business trip		32%	29%	34%	32%	
For a short journey	<i>New item 2010</i>	9%	8%	10%	9%	

 Significantly higher than total Germany 2010

Reason's for not considering hiring a car in the next 12 months

Q18b. For which reasons would you not consider hiring a car in the next 12 months?

Base : Have not hired a car and would not consider to do it (491)

Yes, absolutely
NET Yes

Germany



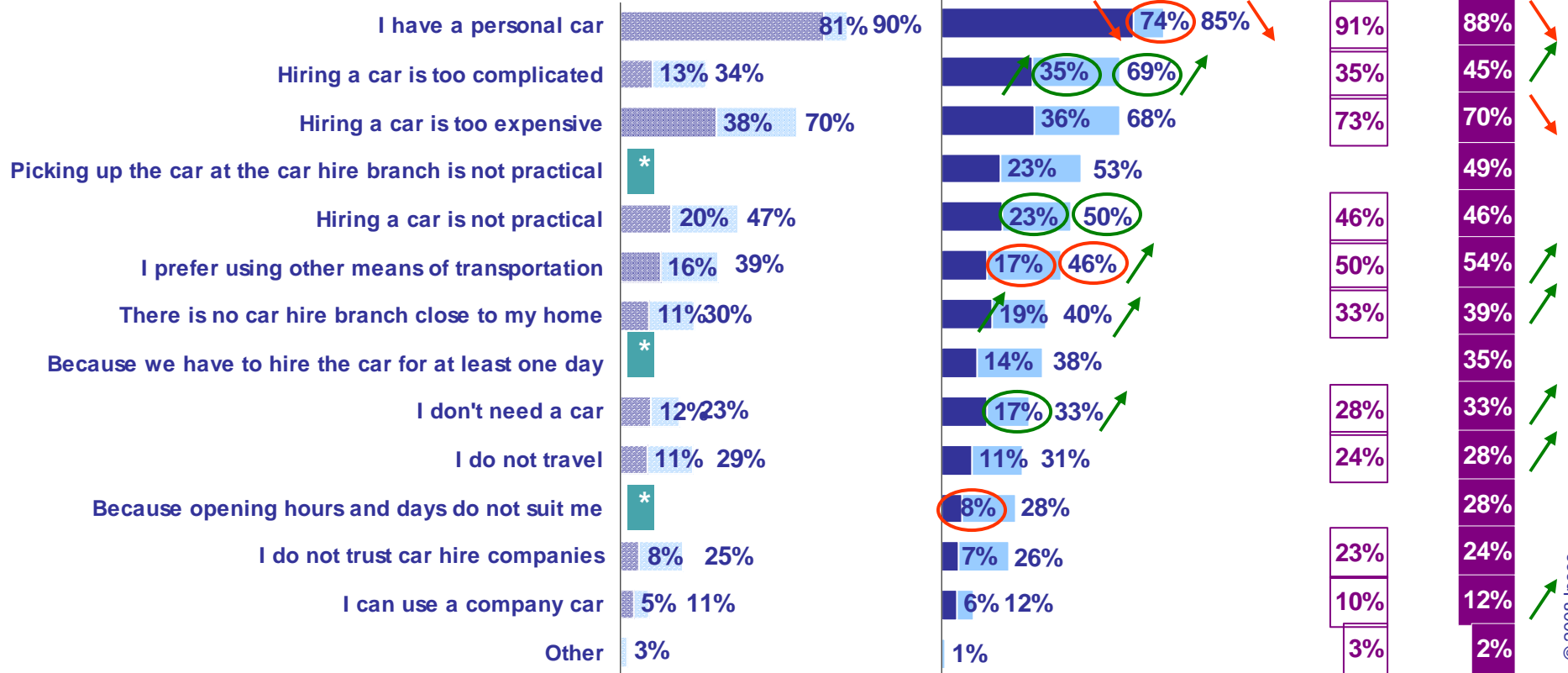
EUROPE

2009

2010

2009

2010



→ Significantly higher / lower than 2009

○ Significantly higher / lower than Europe 2010

*New item 2010

Reason's for not considering hiring a car in the next 12 months

Q18b. For which reasons would you not consider hiring a car in the next 12 months?

Base : Have not hired a car and would not consider to do it (491)

Germany 

2010

NET Yes

	Germany (491)	Gender		Age			Professional situation		
		Men (223)	Women (268)	18-34 y.o. (142)	35-54 y.o. (238)	55 y.o. and more (111)	Upper class (83)	Lower class (249)	Inactive (159)
Base Brute	(491)	(223)	(268)	(142)	(238)	(111)	(83)	(249)	(159)
I have a personal car	85%	83%	87%	82%	88%	83%	88%	87%	81%
Hiring a car is too complicated	69%	64%	72%	72%	70%	60%	69%	71%	66%
Hiring a car is too expensive	68%	65%	71%	72%	68%	64%	62%	71%	68%
Picking up the car at the car hire branch is not practical	* 53%	48%	58%	55%	55%	48%	55%	55%	50%
Hiring a car is not practical	50%	49%	50%	57%	49%	42%	57%	51%	45%
I prefer using other means of transportation	46%	45%	47%	54%	43%	41%	39%	46%	49%
There is no car hire branch close to my home	40%	33%	46%	40%	39%	42%	45%	39%	39%
Because we have to hire the car for at least one day	* 38%	36%	41%	43%	37%	35%	42%	38%	37%
I don't need a car	33%	36%	31%	41%	30%	30%	18%	38%	35%
I do not travel	31%	29%	33%	32%	30%	33%	21%	31%	37%
Because opening hours and days do not suit me	* 28%	28%	29%	32%	29%	23%	29%	30%	26%
I do not trust car hire companies	26%	24%	28%	28%	25%	26%	22%	26%	29%
I can use a company car	12%	14%	12%	13%	14%	8%	19%	13%	8%
Other	1%	2%	1%	1%	1%	4%		1%	3%

*New item 2010

 Significantly higher than total Germany 2010

Reason's for not considering hiring a car in the next 12 months

Q18b. For which reasons would you not consider hiring a car in the next 12 months?

Base : Have not hired a car and would not consider to do it (491)

Germany



NET Yes	2010	Germany (491)	City size		Have already hired a car	
			Rural towns (218)	Urban cities (273)	Yes	No (491)
Base Brute		(491)	(218)	(273)	(491)	
I have a personal car		85%	84%	86%	85%	
Hiring a car is too complicated		69%	66%	71%	69%	
Hiring a car is too expensive		68%	68%	69%	68%	
Picking up the car at the car hire branch is not practical	*	53%	58%	50%	53%	
Hiring a car is not practical		50%	51%	49%	50%	
I prefer using other means of transportation		46%	42%	49%	46%	
There is no car hire branch close to my home		40%	47%	34%	40%	
Because we have to hire the car for at least one day	*	38%	38%	39%	38%	
I don't need a car		33%	30%	36%	33%	
I do not travel		31%	32%	31%	31%	
Because opening hours and days do not suit me	*	28%	29%	28%	28%	
I do not trust car hire companies		26%	30%	23%	26%	
I can use a company car		12%	14%	12%	12%	
Other		1%	1%	2%	1%	

*New item 2010

○ Significantly higher than total Germany 2010



Europcar

- A. Are Europeans ready to give up one of their cars?**
- B. Have they changed their driving habits for cost or environmental reasons?**
 - 1. For cost reasons?**
 - 2. For environmental reasons?**
- C. Experience and attitudes with car rental**
 - 1. Experience with car rental**
 - 2. Attitudes towards car rental**
 - 3. Experience with carsharing**
- D. Complements**
- E. Sample description**

Attitudes regarding car rental

Q29. You are going to read a list of statements regarding travel arrangements. For each of them, do you completely agree, somewhat agree, somewhat disagree or completely disagree?

Base : Main sample (drivers) (1019)



	2010												
	Germany	Gender		Age			Professional situation			City size		Have already hired a car	
		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
Hiring a car is difficult / stressful	51%	49%	54%	58%	51%	40%	51%	52%	51%	55%	49%	53%	
Car hire allows me to adapt my car to my needs	46%	48%	44%	52%	45%	38%	50%	47%	41%	43%	48%	64%	35%
Hiring a car is practical	36%	39%	34%	42%	36%	27%	40%	37%	33%	33%	39%	54%	25%
Hiring a car is more ecological	33%	35%	31%	32%	35%	29%	36%	33%	30%	35%	32%	44%	26%
Hiring a car is more economical than owning a car	27%	28%	26%	26%	29%	24%	30%	25%	26%	25%	29%	40%	19%

○ Significantly higher than total Germany 2010

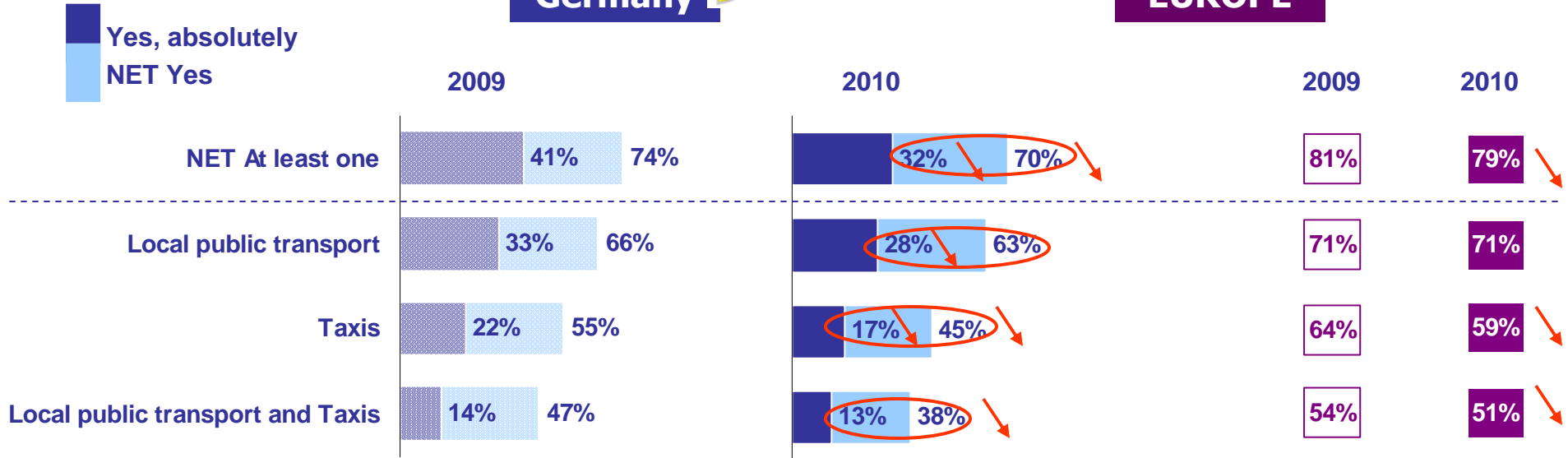
Flexibility of car rental

Q23. When travelling by train or plane, would you say that hiring a car is more flexible than using...

Base : Main sample (drivers) (1019)

Germany

EUROPE



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

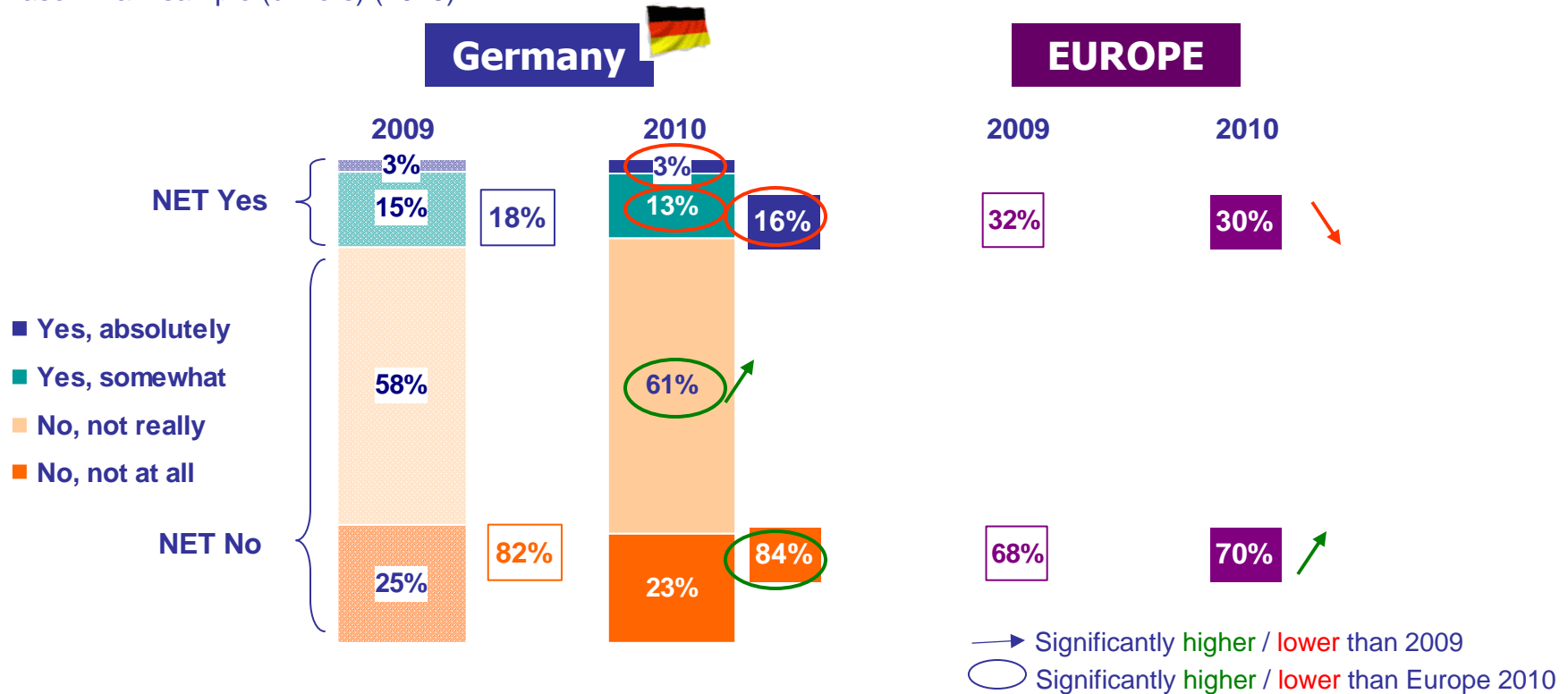
2010 NET Yes	Germany (1019)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute													
NET At least one	70%	70%	70%	77%	67%	63%	69%	72%	66%	71%	69%	83%	61%
Local public transport	63%	63%	62%	70%	61%	53%	62%	66%	59%	61%	64%	76%	55%
Taxis	45%	44%	46%	48%	45%	40%	48%	47%	39%	48%	43%	55%	39%
Local public transport and Taxis	38%	37%	39%	41%	38%	31%	41%	41%	32%	38%	38%	47%	32%

○ Significantly higher than total Germany 2010

Would you say that hiring a car allows you to save on travel costs?

Q22. Would you say that in the current economic climate hiring a car allows you to save on travel costs?

Base : Main sample (drivers) (1019)



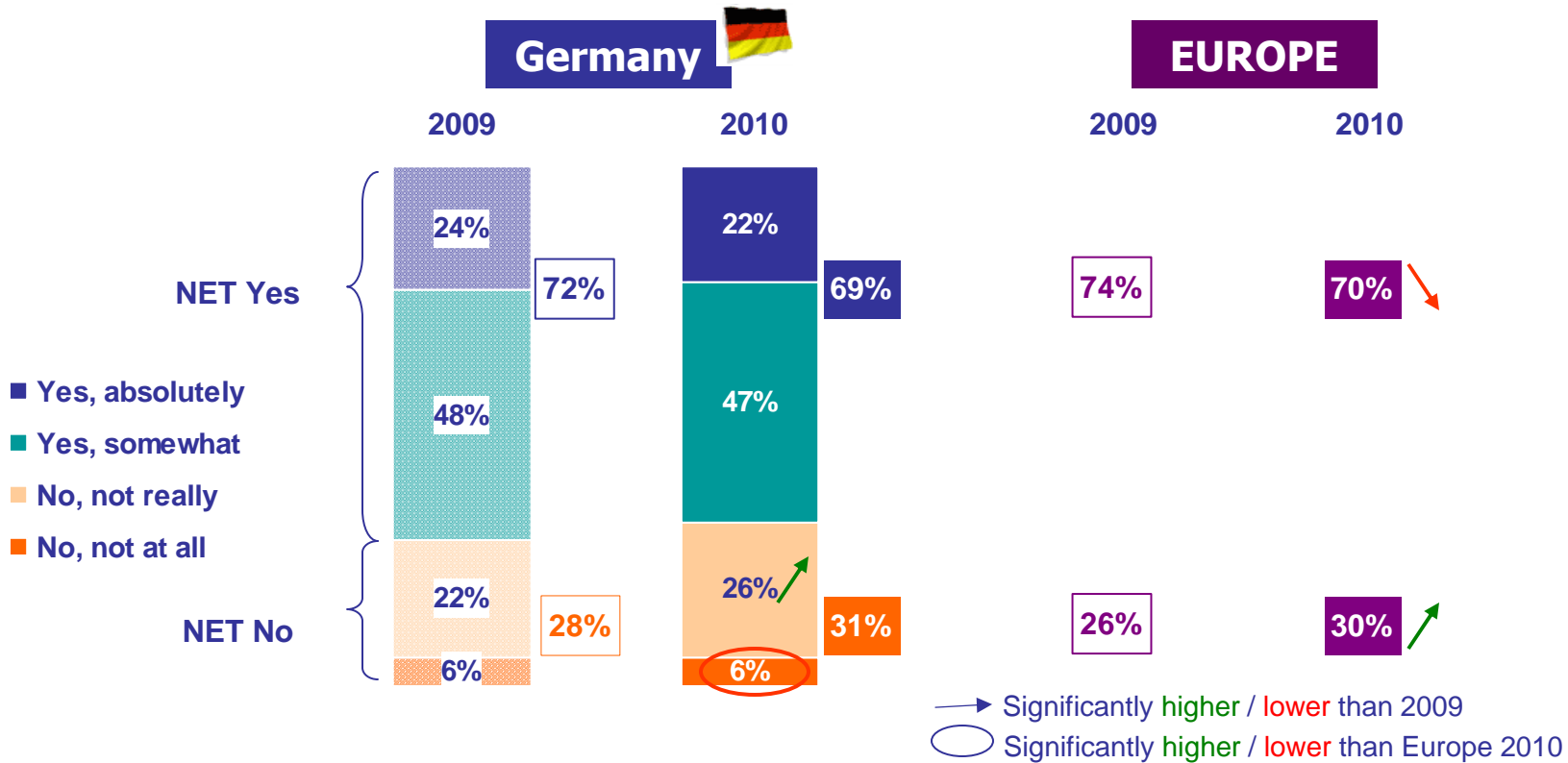
	2010		Gender		Age			Professional situation			City size		Have already hired a car	
	Germany		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
Base Brute	(1019)		(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
NET Yes	16%		19%	14%	16%	18%	11%	21%	15%	14%	14%	18%	28%	9%

○ Significantly higher than total Germany 2010

Would you say that hiring a car allows you to save on wear and tear/maintenance costs?

Q24. Would you say that hiring a car allows you to save on wear and tear/maintenance costs on your own car?

Base : Owners of at least one household's car (980)



	2010												
	Germany	Gender		Age			Professional situation			City size		Have already hired a car	
		Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
Base Brute	(980)	(486)	(494)	(316)	(473)	(191)	(240)	(476)	(264)	(418)	(562)	(367)	(613)
NET Yes	69%	73%	65%	67%	70%	67%	71%	71%	62%	68%	70%	77%	64%

○ Significantly higher than total Germany 2010

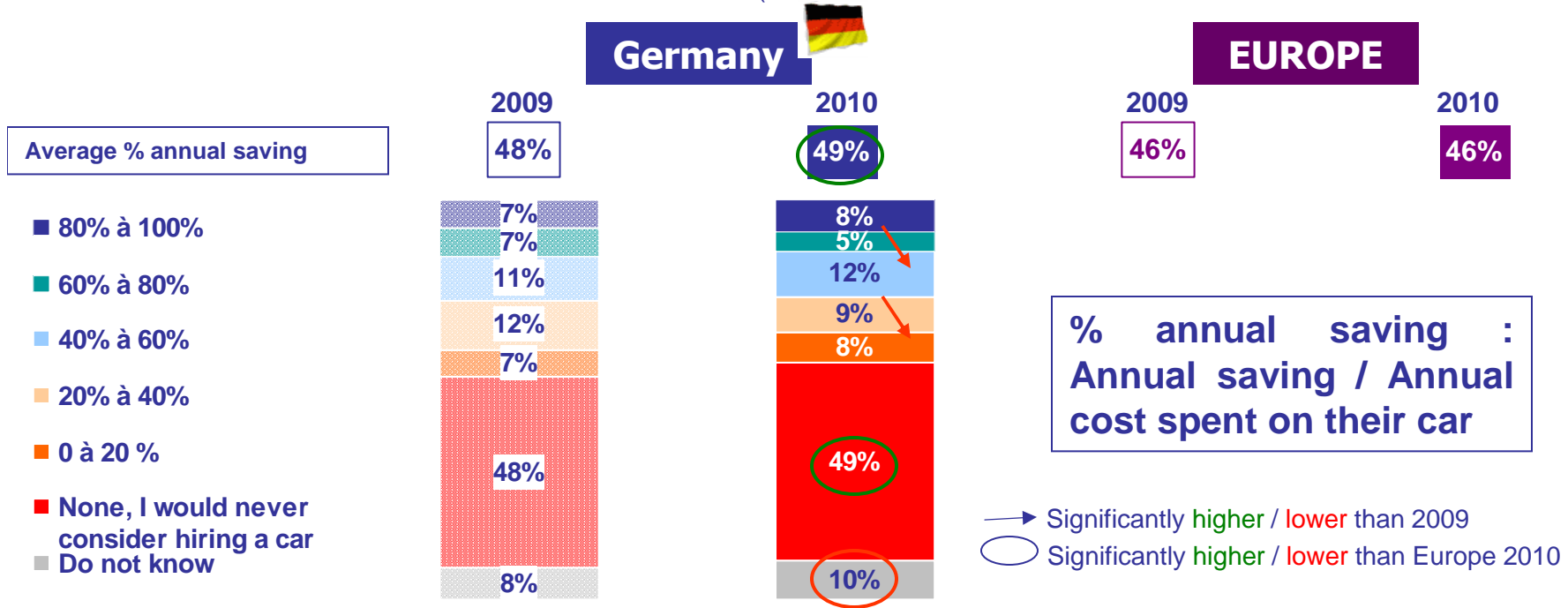


% Annual savings that would make you choose car rental

Q8.Q8b. Excluding variable costs, how much do you spend each month on your household's car?

Q19 Q19b. What would be the trigger amount in terms of annual savings that would make you choose car hire instead of ownership?

Base : Drivers owners of at least one household's car (980)



Average % annual saving

2010	Germany		Age			Professional situation			City size		Have already hired a car	
	Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
	(228)	(172)	(147)	(195)	(58)	(105)	(208)	(87)	(164)	(236)	(219)	(181)
	49%	50%	47%	44%	51%	53%	48%	44%	49%	49%	49%	49%

○ Significantly higher than total Germany 2010



Europcar

- A. Are Europeans ready to give up one of their cars?**
- B. Have they changed their driving habits for cost or environmental reasons?**
 - 1. For cost reasons?**
 - 2. For environmental reasons?**
- C. Experience and attitudes with car rental**
 - 1. Experience with car rental**
 - 2. Attitudes towards car rental**
 - 3. Experience with carsharing**
- D. Complements**
- E. Sample description**



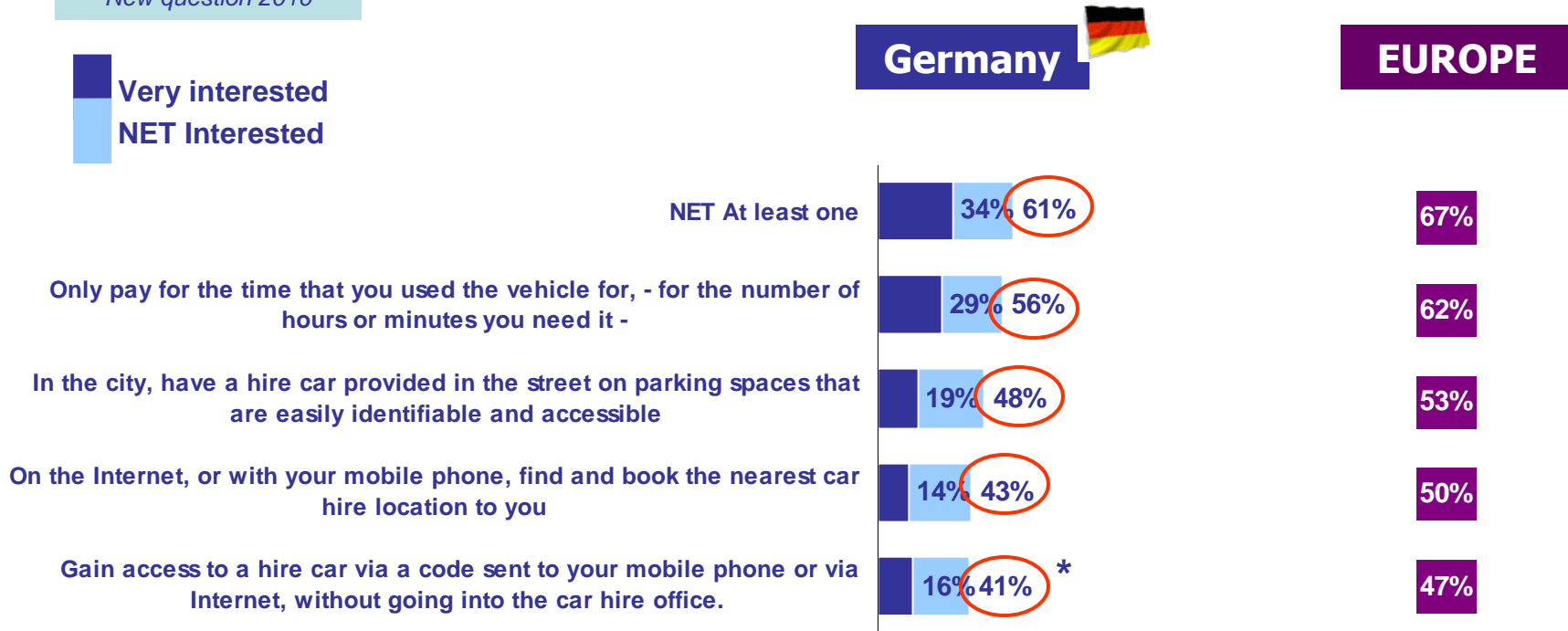
Would you be interested in the following car hire-related services?

Q24a. Would you be interested in the following car hire-related services ?

Base : Main sample (drivers) (1019)

New question 2010

Very interested
NET Interested



○ Significantly higher / lower than Europe 2010

* 50% are interested in urban centre of over 1 million inhabitants

Would you be interested in the following car hire-related services?

Q24a. Would you be interested in the following car hire-related services ?

Base : Main sample (drivers) (1019)

New question 2010

Germany



2010

NET Interested

	Germany (1019)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
NET At least one	61%	66%	56%	70%	60%	50%	69%	61%	55%	61%	61%	85%	47%
Only pay for the time that you used the vehicle for, - for the number of hours or minutes you need it -	56%	60%	52%	61%	56%	46%	63%	56%	49%	57%	55%	77%	43%
In the city, have a hire car provided in the street on parking spaces that are easily identifiable and accessible	48%	52%	45%	56%	50%	32%	56%	49%	41%	47%	49%	70%	35%
On the Internet, or with your mobile phone, find and book the nearest car hire location to you	43%	47%	39%	52%	42%	28%	49%	44%	35%	41%	44%	64%	30%
Gain access to a hire car via a code sent to your mobile phone or via Internet, without going into the car hire office.	41%	47%	36%	51%	41%	24%	49%	43%	32%	38%	43%	63%	28%



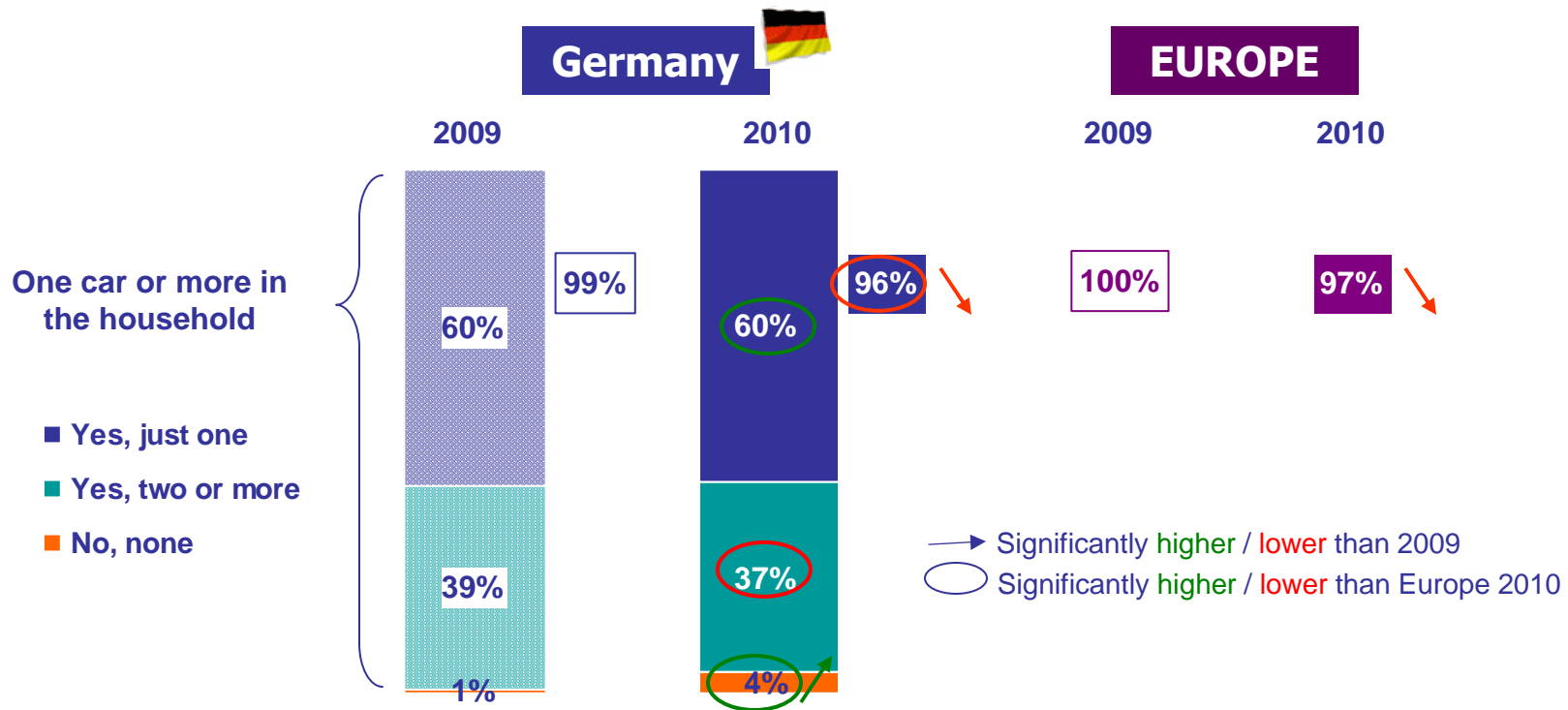
Europcar

- A. Are Europeans ready to give up one of their cars?**
- B. Have they changed their driving habits for cost or environmental reasons?**
 - 1. For cost reasons?**
 - 2. For environmental reasons?**
- C. Experience and attitudes with car rental**
 - 1. Experience with car rental**
 - 2. Attitudes towards car rental**
 - 3. Experience with carsharing**
- D. Complements**
- E. Sample description**

Ownership of household cars

Q5. Does your household have one or more cars ?

Base : Main sample (drivers) (1019)



	2010		Germany			Professional situation			City size		Have already hired a car	
	Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No
Base Brute	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	(425)	(594)	(391)	(628)
NET Yes	96%	95%	94%	97%	98%	97%	97%	94%	98%	95%	94%	98%

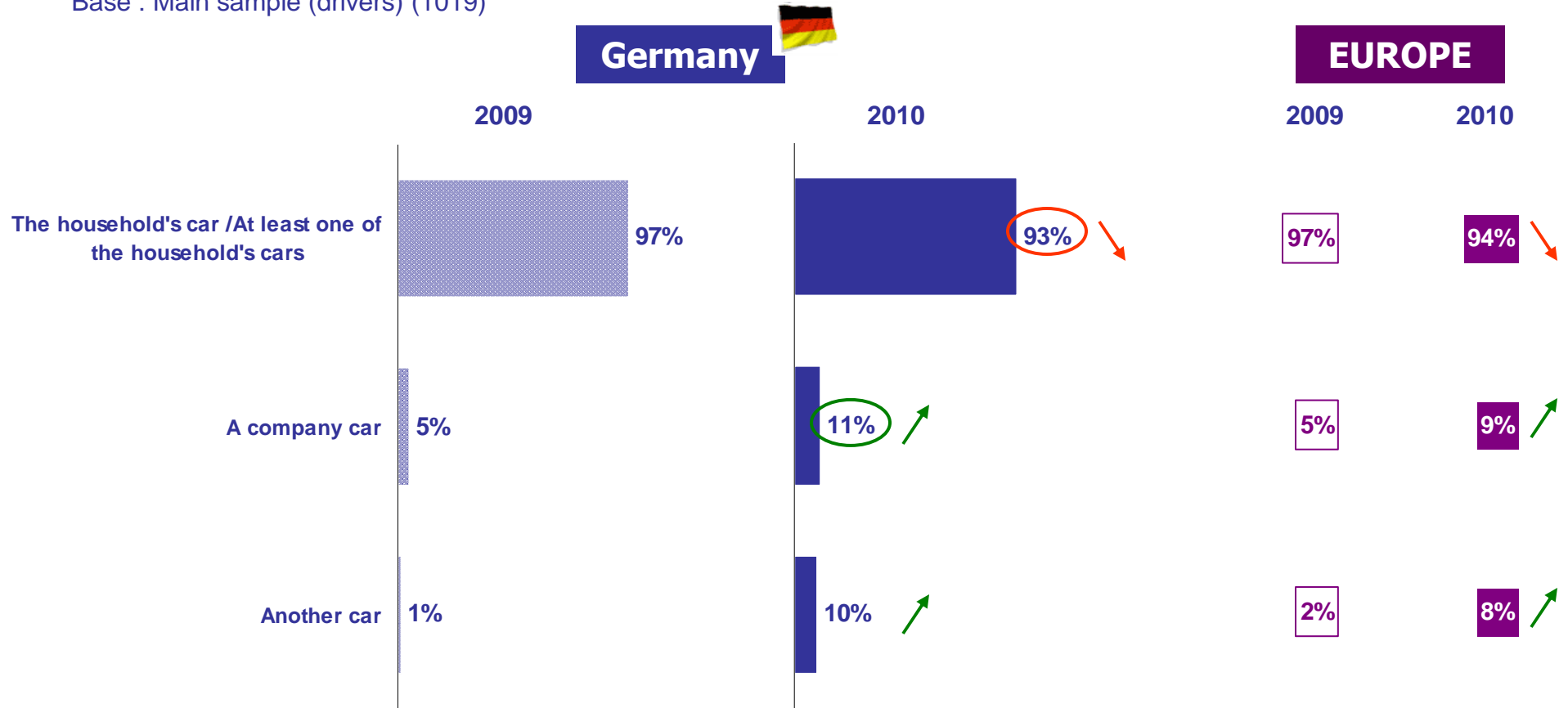
© 2008 Ipsos

○ Significantly higher than total Germany 2010

Vehicle(s) driven

Q5b. Do you drive even if only occasionally... ?

Base : Main sample (drivers) (1019)

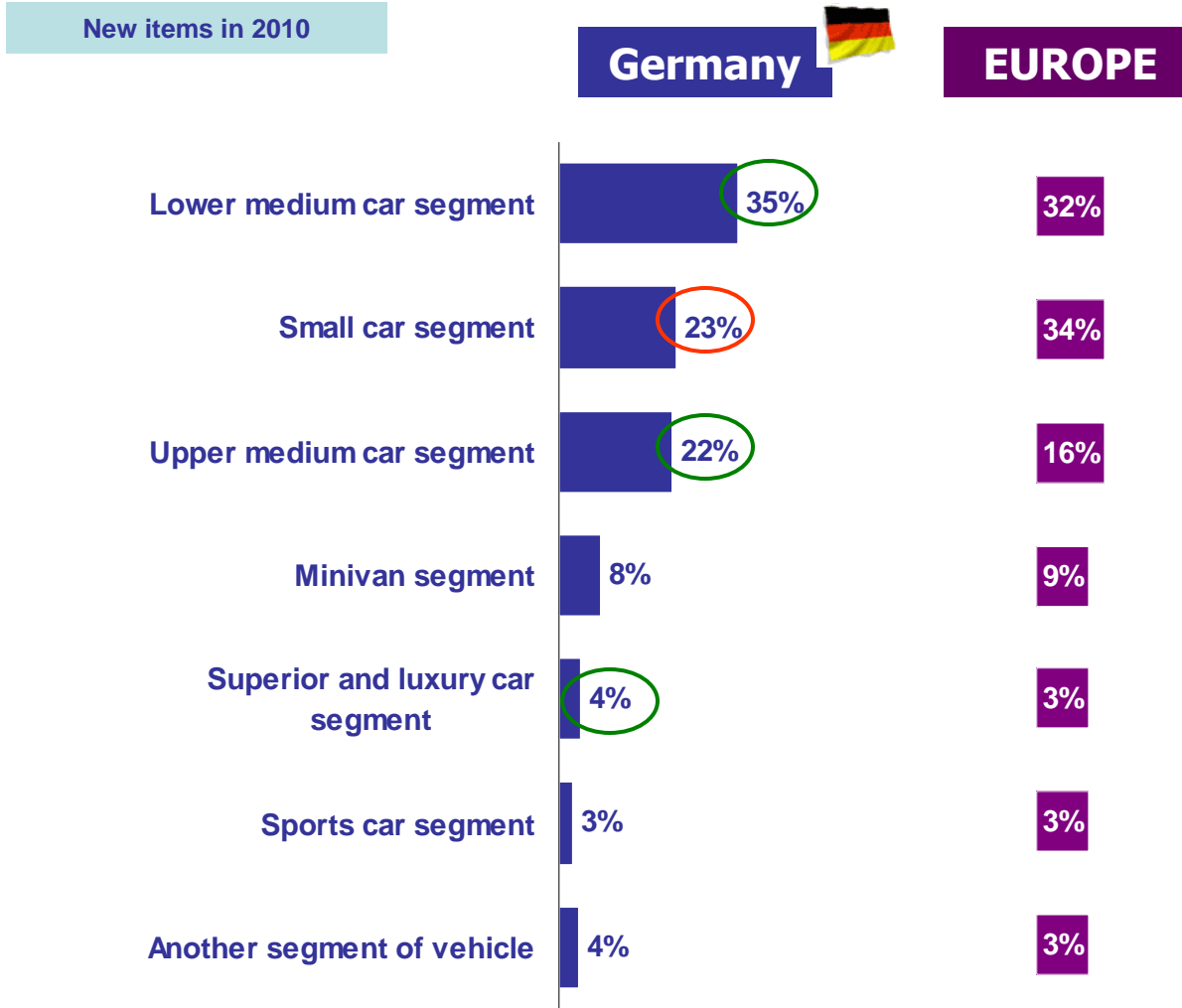


→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

Brand and model of the car used most often

Q6. What is the make and model of your household's car / the household's car you use the most?

Base : Owners of at least one household's car (980)



○ Significantly higher / lower than Europe 2010

Brand and model of the car used most often

Q6. What is the make and model of your household's car / the household's car you use the most?

Base : Owners of at least one household's car (980)

Germany

2010	Germany (980)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (486)	Women (494)	18-34 y.o. (316)	35-54 y.o. (473)	55 y.o. and more (191)	Upper class (240)	Lower class (476)	Inactive (264)	Rural towns (418)	Urban cities (562)	Yes (367)	No (613)
Base Brute	(980)	(486)	(494)	(316)	(473)	(191)	(240)	(476)	(264)	(418)	(562)	(367)	(613)
Lower medium car segmen	35%	36%	34%	35%	33%	42%	31%	36%	37%	40%	32%	31%	38%
Small car segment	23%	15%	31%	30%	22%	15%	13%	28%	25%	21%	25%	21%	25%
Upper medium car segmen	22%	26%	19%	24%	22%	22%	26%	21%	21%	19%	25%	28%	19%
Minivan segment	8%	9%	8%	5%	11%	6%	10%	7%	8%	10%	7%	6%	10%
Superior and luxury car segment	4%	7%	2%	2%	5%	8%	9%	2%	4%	5%	4%	7%	3%
Sports car segment	3%	4%	2%	2%	3%	4%	6%	2%	1%	2%	3%	5%	2%
Another segment of vehicle	4%	4%	4%	3%	5%	3%	5%	3%	4%	3%	4%	3%	5%

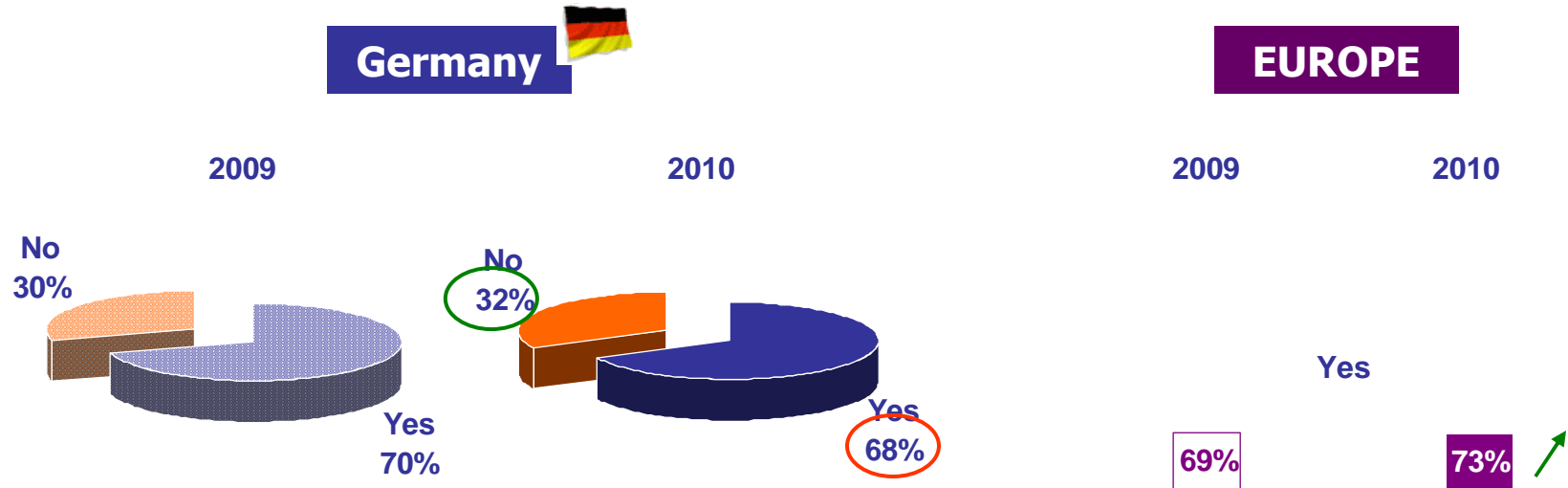
New items in 2010

 Significantly higher than total Germany 2010

Is this the household's main car?

Q6b. Is this the main car you would use most often for long journeys such as holidays?

Base : Owners of at least two household's cars (370)



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

	2010		Germany			Age			Professional situation			City size		Have already hired a car	
	Men	Women	18-34 y.o.	35-54 y.o.	55 y.o. and more	Upper class	Lower class	Inactive	Rural towns	Urban cities	Yes	No			
Base Brute	(169)	(201)	(139)	(177)	(54)	(98)	(183)	(89)	(199)	(171)	(144)	(226)			
Yes	68%	82%	59%	71%	81%	79%	67%	58%	68%	68%	76%	62%			

○ Significantly higher than total Germany 2010

Driven ecological car(s)

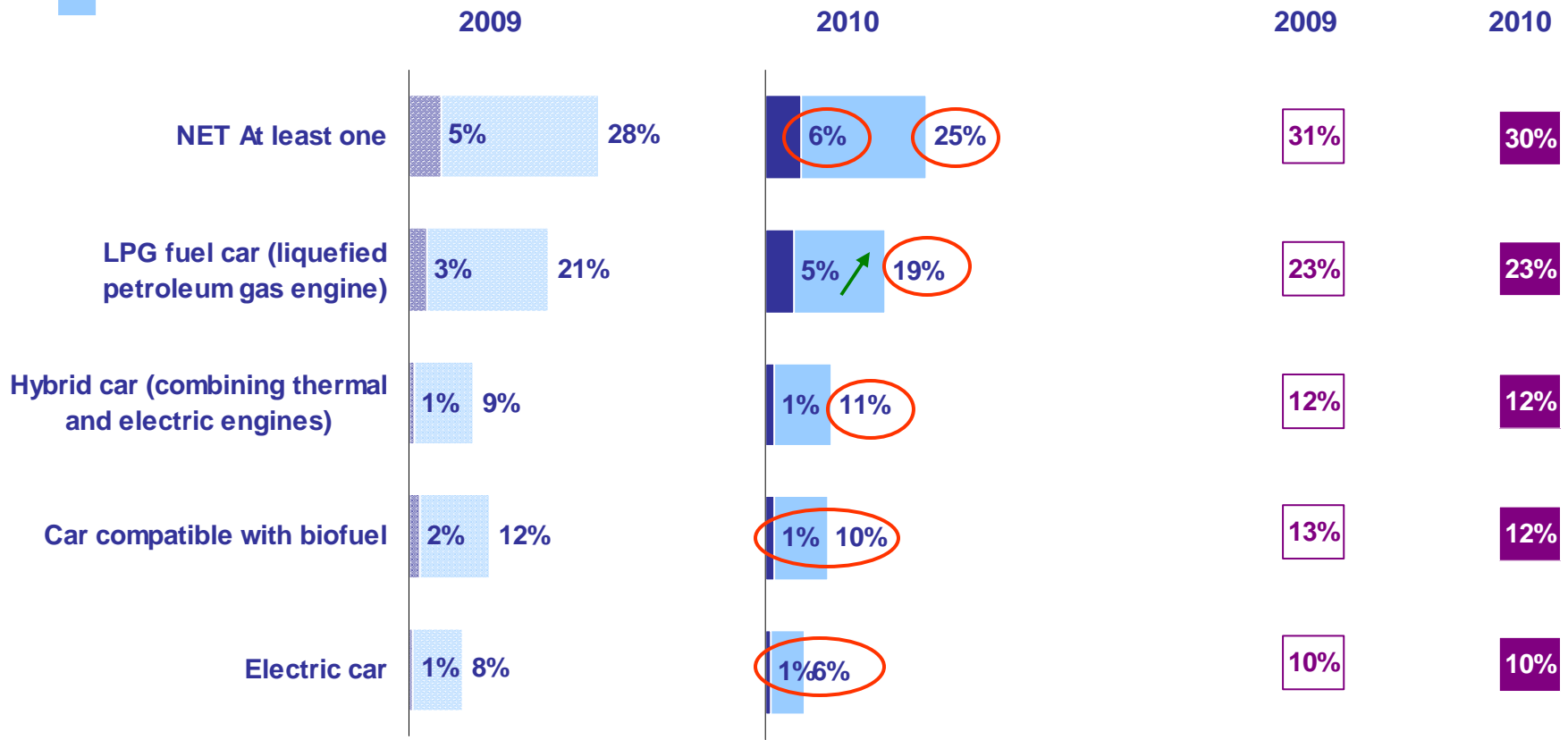
Q26. Have you ever driven one of these ecological cars?

Base : Main sample (drivers) (1019)

Yes, regularly
 NET Yes

Germany

EUROPE



Significantly higher / lower than 2009
 Significantly higher / lower than Europe 2010

Driven ecological car(s)

Q26. Have you ever driven one of these ecological cars?

Base : Main sample (drivers) (1019)

Germany 

NET Yes

2010

	Germany (1019)	Gender		Age			Professional situation			City size		Have already hired a car	
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute													
NET At least one	25%	31%	20%	25%	25%	27%	33%	24%	22%	28%	23%	36%	19%
LPG fuel car (liquefied petroleum gas engine)	19%	22%	15%	22%	18%	15%	22%	20%	14%	20%	18%	28%	13%
Hybrid car (combining thermal and electric engines)	11%	15%	6%	12%	9%	11%	13%	10%	10%	11%	10%	20%	5%
Car compatible with biofuel	10%	14%	6%	10%	10%	8%	13%	10%	7%	11%	9%	16%	6%
Electric car	6%	8%	4%	9%	5%	5%	7%	6%	5%	6%	6%	12%	3%

 Significantly higher than total Germany 2010



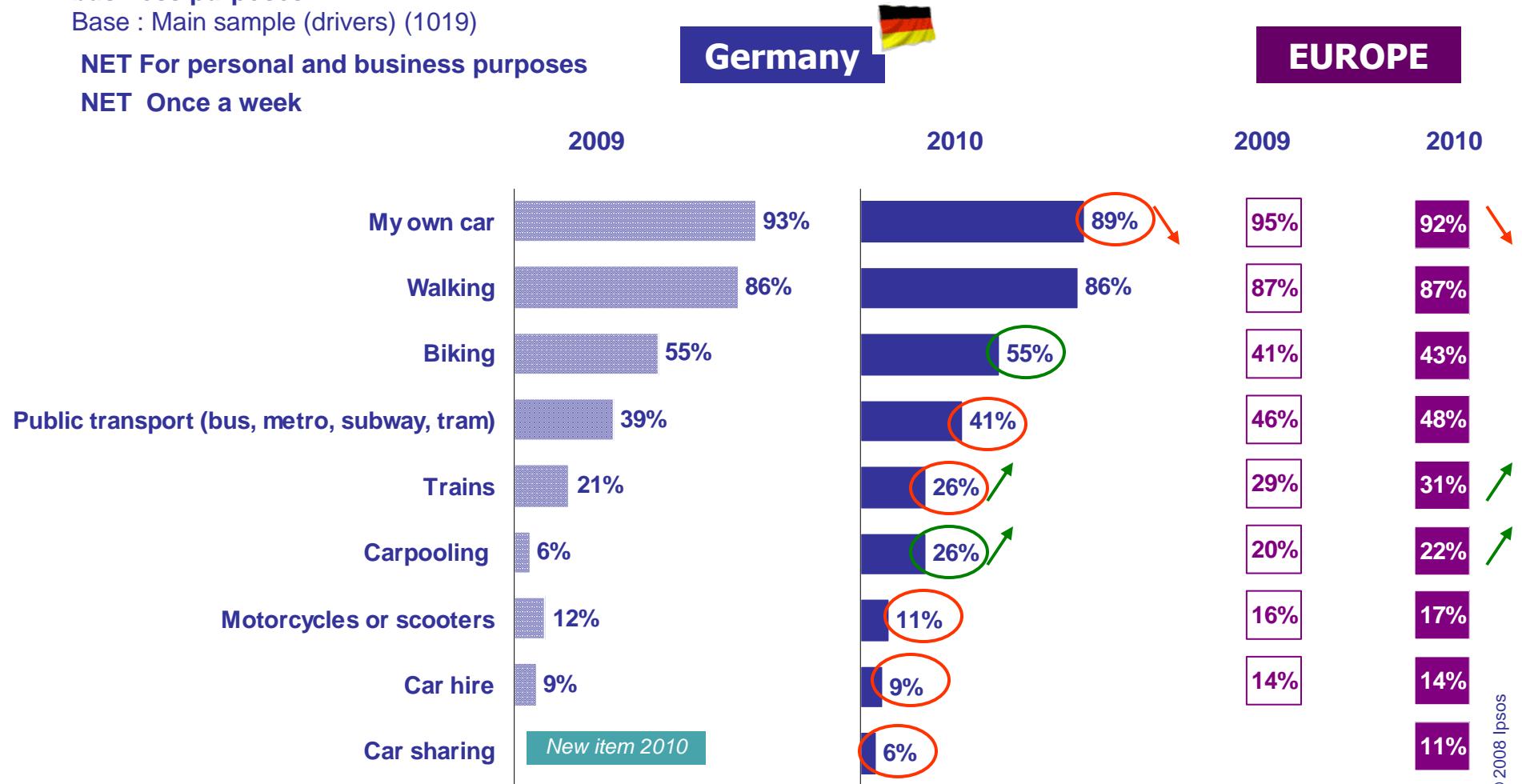
Means of transportation used at least once a week

Q30. Among the following, which means of transportation do you use at least once a week for personal and business purposes?

Base : Main sample (drivers) (1019)

NET For personal and business purposes

NET Once a week



→ Significantly higher / lower than 2009
 ○ Significantly higher / lower than Europe 2010

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Means of transportation used at least once a week

Q30. Among the following, which means of transportation do you use at least once a week for personal and business purposes?

Base : Main sample (drivers) (1019)

Germany 
NET Once a week

NET For personal and business purposes

	2010 (1019)	Gender		Age			Professional situation			
		Men (509)	Women (510)	18-34 y.o. (336)	35-54 y.o. (489)	55 y.o. and more (194)	Upper class (248)	Lower class (491)	Inactive (280)	
Base Brute	(1019)	(509)	(510)	(336)	(489)	(194)	(248)	(491)	(280)	
My own car	89%	89%	89%	81%	93%	93%	90%	90%	86%	
Walking	86%	86%	87%	89%	86%	84%	88%	85%	87%	
Biking	55%	56%	54%	54%	58%	50%	57%	55%	54%	
Public transport (bus, metro, subway, tram)	41%	40%	42%	50%	35%	39%	39%	37%	47%	
Trains	26%	27%	24%	34%	21%	23%	26%	24%	29%	
Carpooling	26%	24%	28%	37%	22%	17%	26%	27%	25%	
Motorcycles or scooters	11%	16%	7%	16%	9%	9%	14%	11%	10%	
Car hire	9%	11%	7%	14%	7%	7%	13%	8%	8%	
Car sharing	<i>New item 2010</i>	6%	7%	6%	11%	5%	4%	9%	5%	6%

Means of transportation used at least once a week

Q30. Among the following, which means of transportation do you use at least once a week for personal and business purposes?

Base : Main sample (drivers) (1019)

Germany 
NET Once a week

NET For personal and business purposes

	Germany (1019)	City size		Have already hired a car		
		2010	Rural towns (425)	Urban cities (594)	Yes (391)	No (628)
Base Brute						
My own car	89%	92%	87%	88%	90%	
Walking	86%	86%	87%	89%	85%	
Biking	55%	55%	55%	64%	50%	
Public transport (bus, metro, subway, tram)	41%	28%	50%	51%	34%	
Trains	26%	22%	29%	34%	21%	
Carpooling	26%	26%	26%	34%	21%	
Motorcycles or scooters	11%	12%	11%	19%	7%	
Car hire	9%	9%	9%	20%	3%	
Car sharing	<i>New item 2010</i>	6%	5%	7%	14%	2%

 Significantly higher than total Germany 2010



Europcar

- A. Are Europeans ready to give up one of their cars?**
- B. Have they changed their driving habits for cost or environmental reasons?**
 - 1. For cost reasons?**
 - 2. For environmental reasons?**
- C. Experience and attitudes with car rental**
 - 1. Experience with car rental**
 - 2. Attitudes towards car rental**
 - 3. Experience with carsharing**
- D. Complements**
- E. Sample description**



2010

Test 95%

Base : Owners of at least one household's car

Germany

(980)

EUROPE

(5978)

Q31. Yearly car kilometrage	Germany	EUROPE
Less than 7 500 km	18%	20%
7 501 to 15 000 km	40%	38%
15 001 to 30 000 km	29%	29%
30 001 to 45 000 km	7%	7%
More than 45 000 km	2%	2%
Do not know	4%	5%
Mean	15913,4	15697,8

Q32. Frequency of replacement of the household's car	Germany	EUROPE
Every year	1%	1%
2 years	3%	4%
3 years	8%	11%
From 4 to 5 years	20%	23%
From 6 to 8 years	31%	27%
From 9 to 11 years	20%	19%
12 years and more	18%	15%
Mean	7,7	7,2



2010

Base : Owners of at least one household's car

Germany

(980)

EUROPE

(5978)

Q33. First or second hand car	Germany	EUROPE
New	49%	55%
Used	51%	45%

Q34. Car financing	Germany	EUROPE
Cash purchase	67%	60%
Credit purchase	14%	29%
Other	19%	11%

Base brute (1019) (6127)

Q35. City size	Germany	EUROPE
A rural town of fewer than 2,000 inhabitants	18%	16%
A town of fewer than 20,000 inhabitants	23%	26%
A city of 20,000 to 200,000 inhabitants	32%	35%
- A city of 20,000 to 100,000 inhabitants	25%	25%
- A city of 100,000 to 200,000 inhabitants	7%	9%
A city of 200,001 to 500,000 inhabitants	9%	8%
A city of 500,001 to 1 million inhabitants	8%	6%
A city of more than 1 million inhabitants	10%	10%
NET Little urban centers	49%	52%
NET Medium urban centers	16%	14%



Significantly higher than Europe 2010

Sample



2010

Germany	EUROPE
(1019)	(6127)

Base brute

Q1. Gender	Germany	EUROPE
A man	50%	50%
A woman	50%	50%

Q2. Age	Germany	EUROPE
Between 18 and 24 years	13%	14%
Between 25 and 34 years	20%	22%
Between 35 and 44 years	27%	26%
Between 45 and 54 years	22%	21%
Between 55 and 64 years	12%	13%
Over 65 years	6%	5%
Mean	41,5	40,8



2010

Germany	EUROPE
(1019)	(6127)

Base brute

Q3. Position	Germany	EUROPE
NET Position +	25%	27%
Agricultural worker		1%
Business owner	3%	4%
Director	3%	2%
Senior Manager	13%	9%
Professional	7%	11%
NET Position -	46%	46%
White-collar worker, civil servant	29%	35%
Blue-collar worker	17%	11%
NET Inactives	29%	27%
Retired	10%	10%
Student	9%	8%
Unemployed	10%	10%

Q4. Region	Germany	EUROPE
Schleswig-Holstein, Hamburg, Niedersachsen, Bremen	17%	4%
Nordrhein-Westfalen	22%	6%
Hessen, Rheinland-Pfalz, Saarland	14%	4%
Baden-Württemberg	13%	3%
Bayern	14%	4%
Berlin	4%	1%
Brandenburg, Mecklenburg-Vorpommern, Sachsen-Anhalt	8%	2%
Sachsen, Thüringen	8%	2%



Significantly higher than Europe 2010