

# EUROPEAN CUSTOMER SURVEY

New powertrain technologies from a customers' perspective

**MARCH 2009**



## Together with TNS Infratest, Roland Berger conducted a study on hybrid and electric cars from a customers' perspective

European customer survey 02/2009

### Objectives

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- Objective of this survey is to reflect customers brand awareness and preferences regarding hybrid and electric cars

### Method

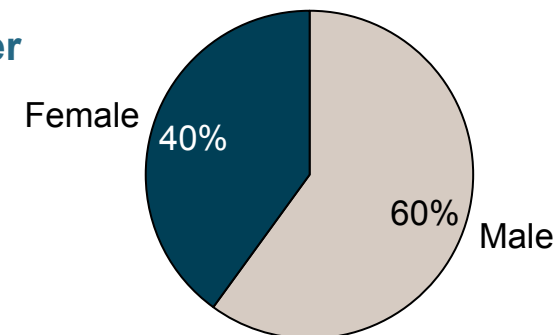
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- TNS Infratest interviewed 1.083 European customers for Roland Berger
- Germany, UK and France were selected as survey target countries – representing the major automotive markets of Western Europe
- The survey was conducted via online interviews from February 16-20, 2009

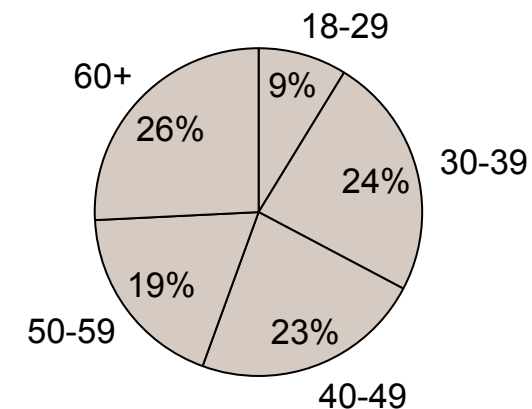
### Survey sample

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#### Gender



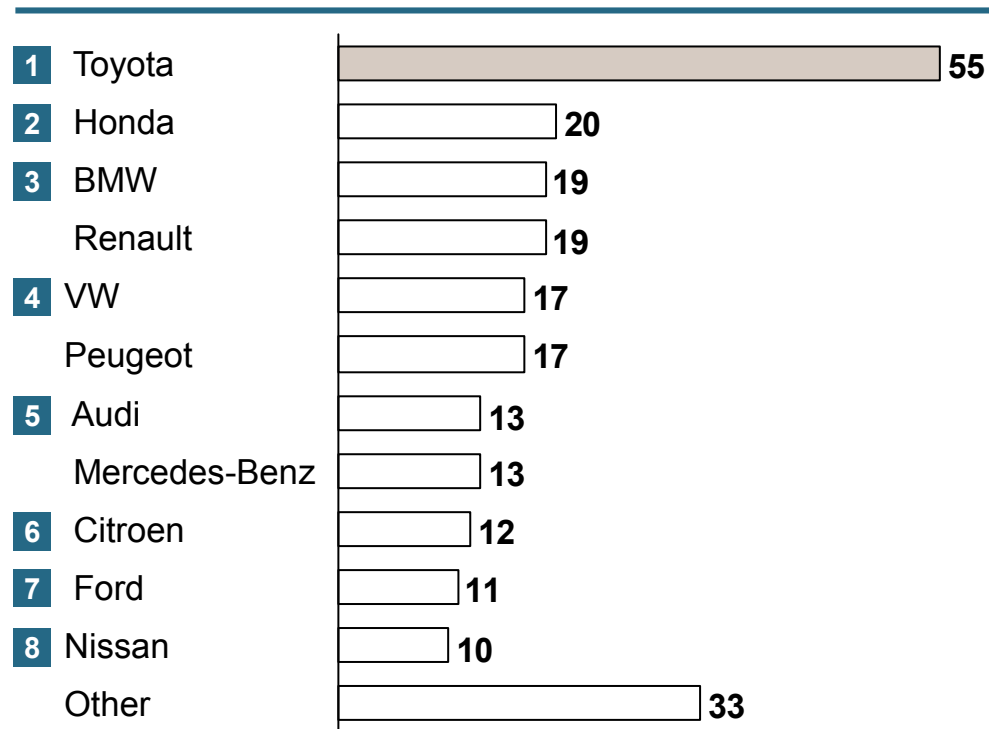
#### Age



## From a customer's point of view, Toyota is the leading player when it comes to clean drive technologies

Which of the following automakers do you think are really making an effort to develop clean drive technologies?<sup>1)</sup>

### Responses [%]



### Comment

- From a European<sup>2)</sup> customers' perspective, Toyota makes the biggest effort in developing clean drive technologies (55%), followed with significant distance by Honda (20%) and BMW and Renault (both 19%)
- Overall customers perceive volume brands as making larger efforts to develop environmental friendly cars
- BMW is the only premium brand within the Top 3

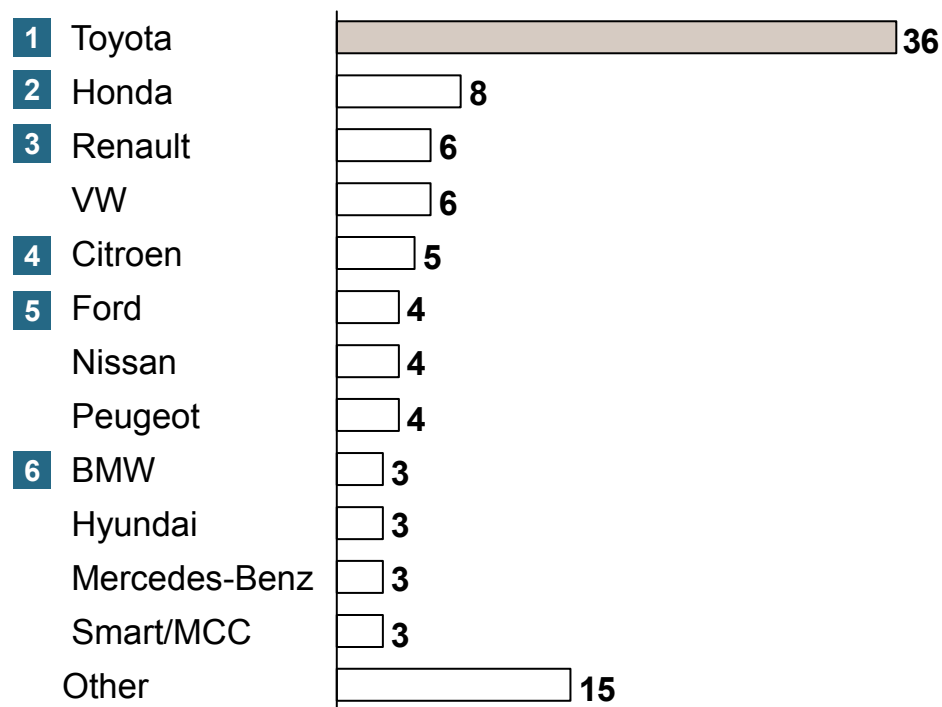
1) Respondents were asked to name up to three brands, total number of brands named 240  
Source: Roland Berger customer survey, executed by TNS Infratest 02/2009

2) Germany, UK and France

## Customers consider volume OEMs best suited to electro/hybrid vehicles

Which make of automobile do you think is best suited to electro/hybrid vehicles?

### Respondents [%]



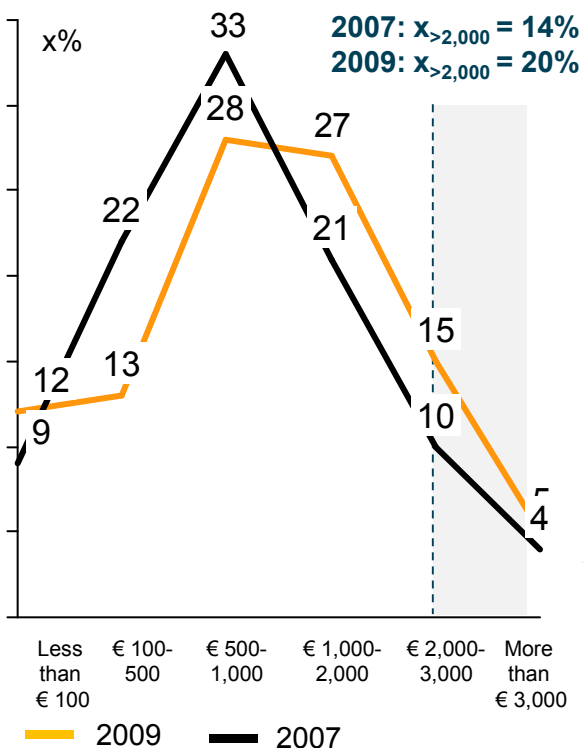
### Comment

- Toyota is even more ahead when it comes to the fit of hybrid/electric vehicles with a brand's image – 36% of all customers consider the Japanese volume brand as the best fit for hybrid/electric cars
- The pursuers, again led by Honda (8%), follow with large distance
- No premium OEM is under the Top 5 brands

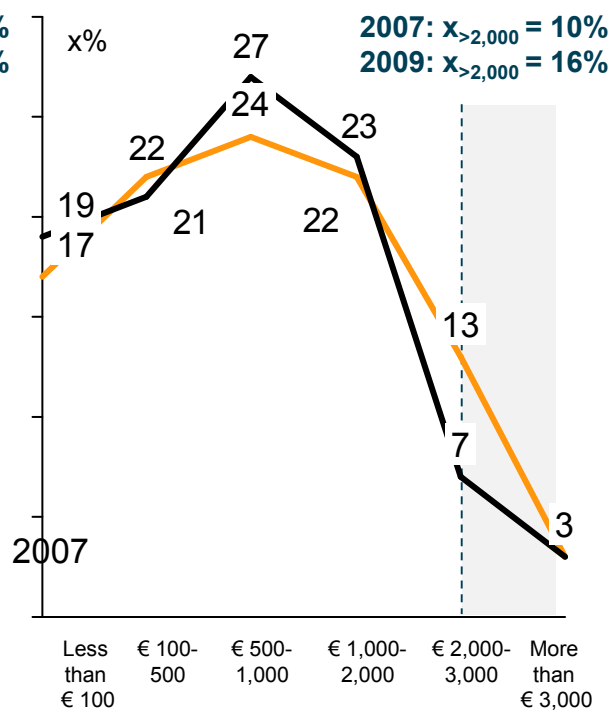
# The willingness to spend more on a car with reduced CO<sub>2</sub> emissions has grown over the last two years

How much extra would you be willing to spend on a new car in order to make an active contribution to cutting carbon emissions?

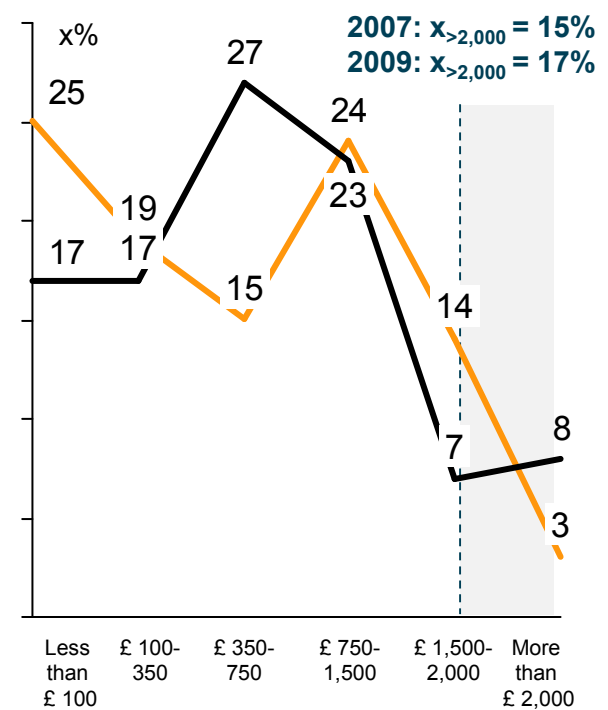
Germany [%]



France [%]



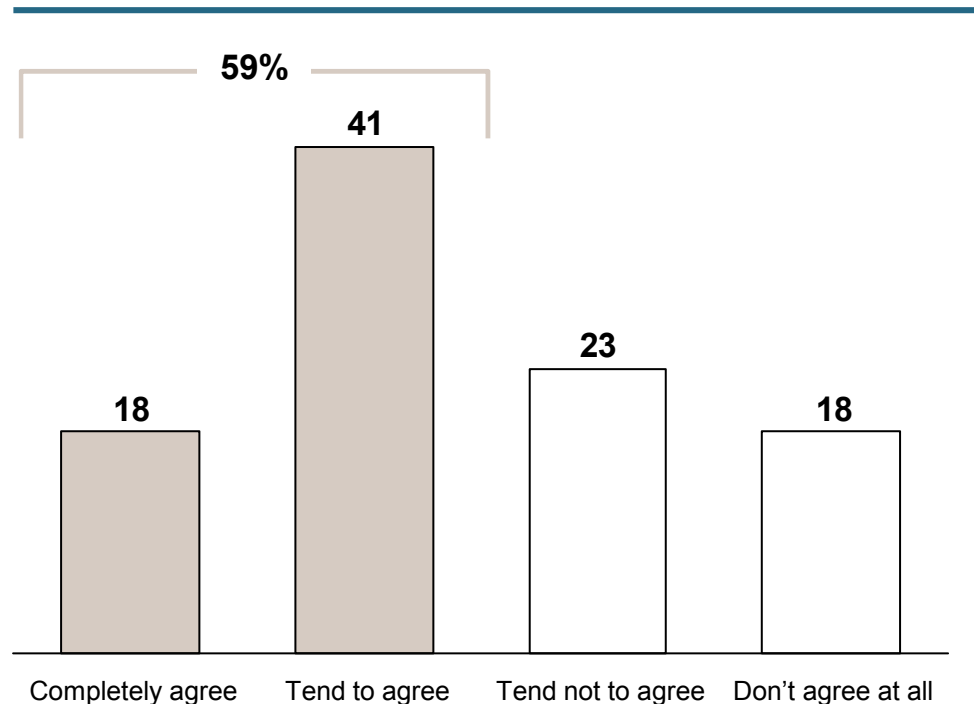
UK [%]



## Almost 60% of the customers like to make their choice towards a clean vehicle with low emissions visible to other people

How much would you agree with the following statement: "If I drove a clean vehicle with low emissions and low fuel consumption, this choice should be made visible to other people (e.g. from the logo or distinctive design)."

### Respondents [%]



### COMMENT

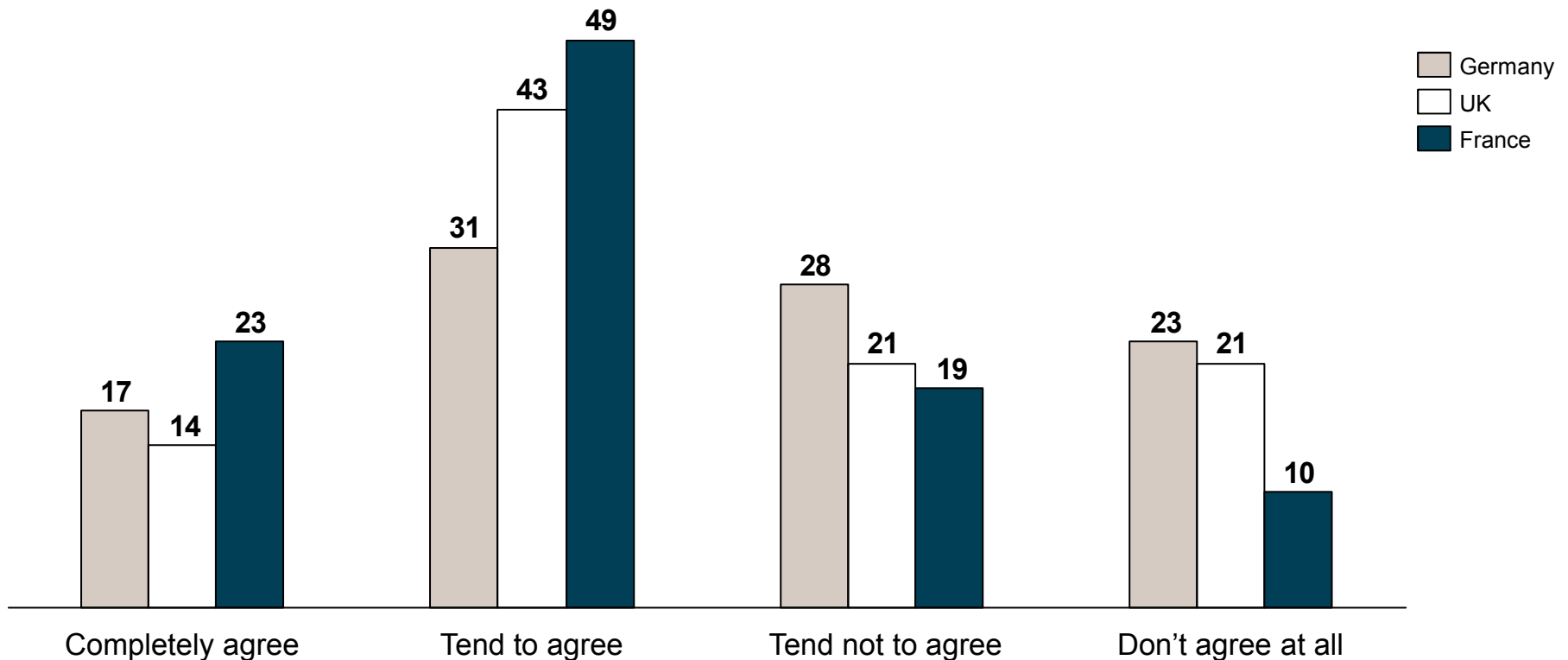
- The majority of European<sup>1)</sup> customers (59%) wants their choice towards a clean vehicle to be visible to other people, e.g. through a logo or a specific vehicle design
- With 72% French customers ask the strongest for a visibility of clean drive technology to other people, in Germany still half of the customers want their choice to be obvious to others

1) Germany, UK and France

Source: Roland Berger customer survey, executed by TNS Infratest 02/2009

## Especially in France people like to have their clean vehicle with low emissions visible to other people

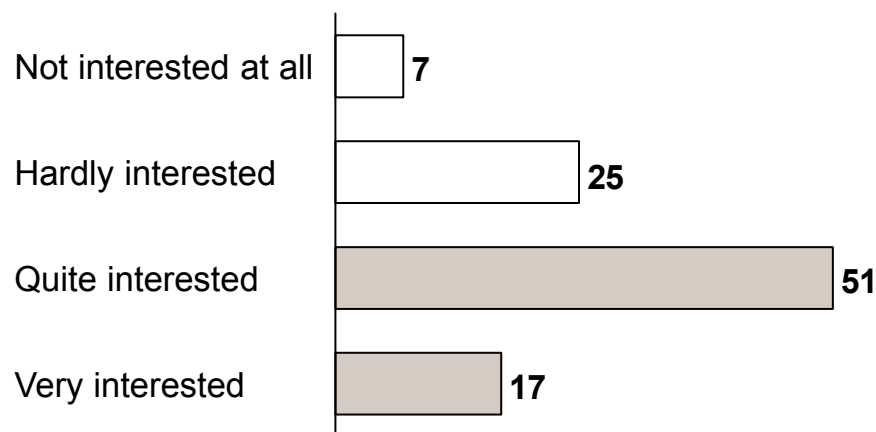
How much would you agree with the following statement: "If I drove a clean vehicle with low emissions and low fuel consumption, this choice should be made visible to other people (e.g. from the logo or distinctive design)."



## A majority of 68% is interested in the subject of cars with alternative drive technologies

How great would you say is your own personal interest in the subject of cars with alternative drive technologies?

### Respondents [%]



### Comment

- A vast majority of consumers (68%) show already real interest in cars with clean drive technologies
- In combination with the earlier responses on automakers efforts in developing clean drive technologies a potential misfit becomes apparent – the majority of consumers is interested in clean drive technologies, but only very little brands are perceived as active in this area