GfK Verein

Planned car purchasing

A GfK Verein study

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GfK Verein

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GfK Verein:
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Planned car purchasing

After buying a home, the purchase of a car – particularly a new one – is for most consumers the costliest private household acquisition they will make. It therefore provides a very good indication of how much the private consumer is willing to spend. In Germany, for example, spending on mobility as a whole, at 15%, lies in second place behind housing costs at 33%, and just ahead of spending on food and drink at 14% (see *Stat. Bundesamt 2010*). Furthermore, the amount spent on mobility increases with the size of the household, from 12% for a one-person household to 16% for households of more than three persons. And the more crisis-resistant the consumer's financial situation is, the more likely he or she is to plan this kind of investment. Analysis based upon the GfK Consumption Trend Sensor in nine countries shows that, in the crisis-resistant consumer group, the relation of new to used car purchasing is approximately 2:1, whereas, conversely, among crisis-prone consumers two used cars are found for every one new car planned for purchase (see p. 44).

The European and US automotive markets are currently disparate: whereas new car registrations in EU countries have decreased by approx. 2 million from their 2007 peak at 15 million, the EFTA countries, Russia, Turkey and the USA have in some cases been able to record double-digit increases in registrations since 2010.

This study on car purchase planning includes the USA, with its 12.7 million new car registrations, and the larger European markets of Germany, Russia, France, the United Kingdom and Italy, through to Austria, Switzerland and Sweden, with still more than 300,000 new car registrations in 2011 respectively (see *ACEA 2012*). Even if the automobile market in Europe should remain difficult because of the euro crisis (planned closures at PSA Peugeot Citroen, Opel and Ford, *inter alia*; see *SZ 2013*), and the automobile market in China continues to grow, new and used cars will still be in demand. Just what this demand is likely to be over the next two years is presented by this GfK Verein study.

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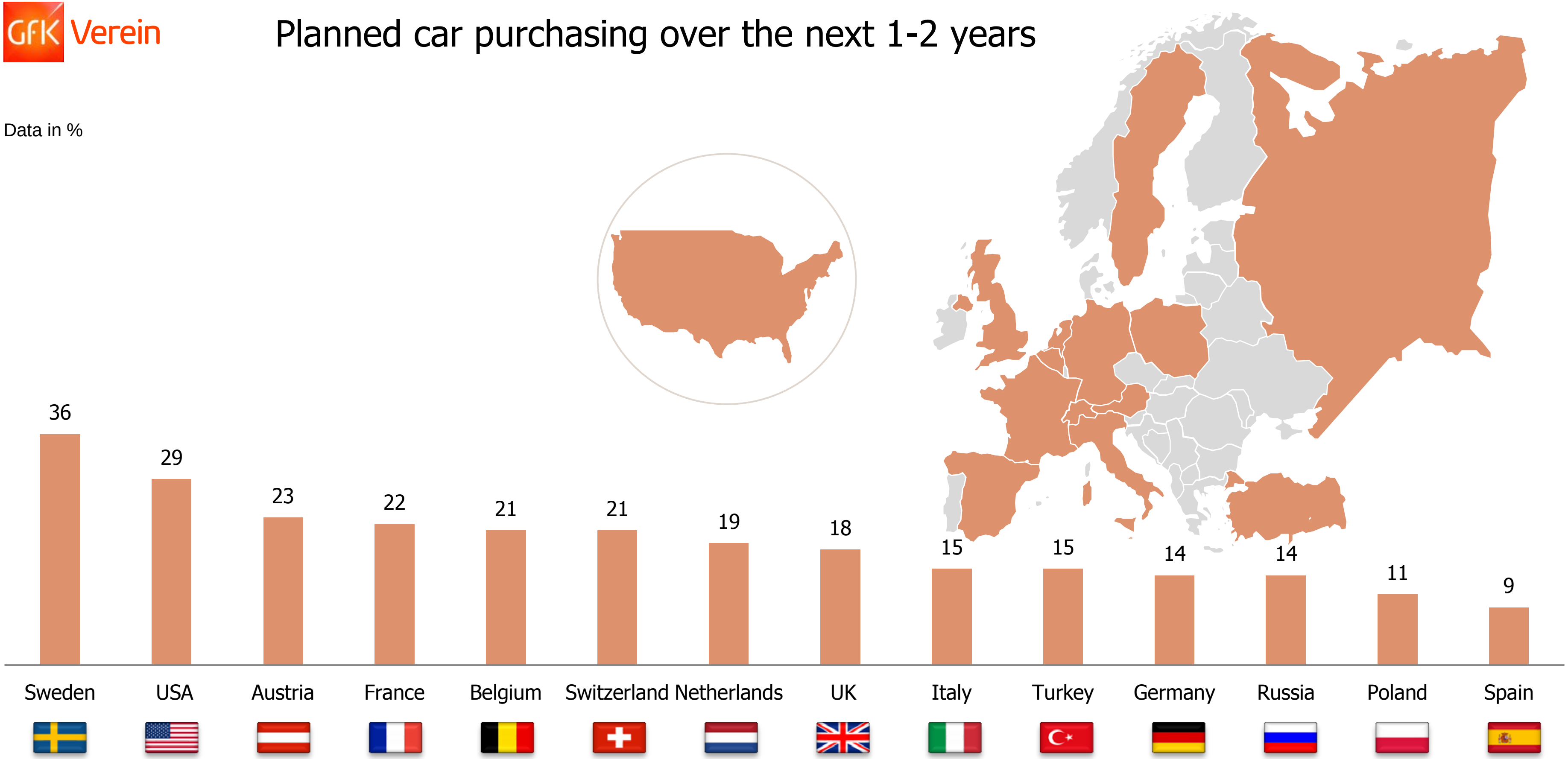
Planned car purchasing over the next 1-2 years

Data in %



Basis: n=15,691 respondents

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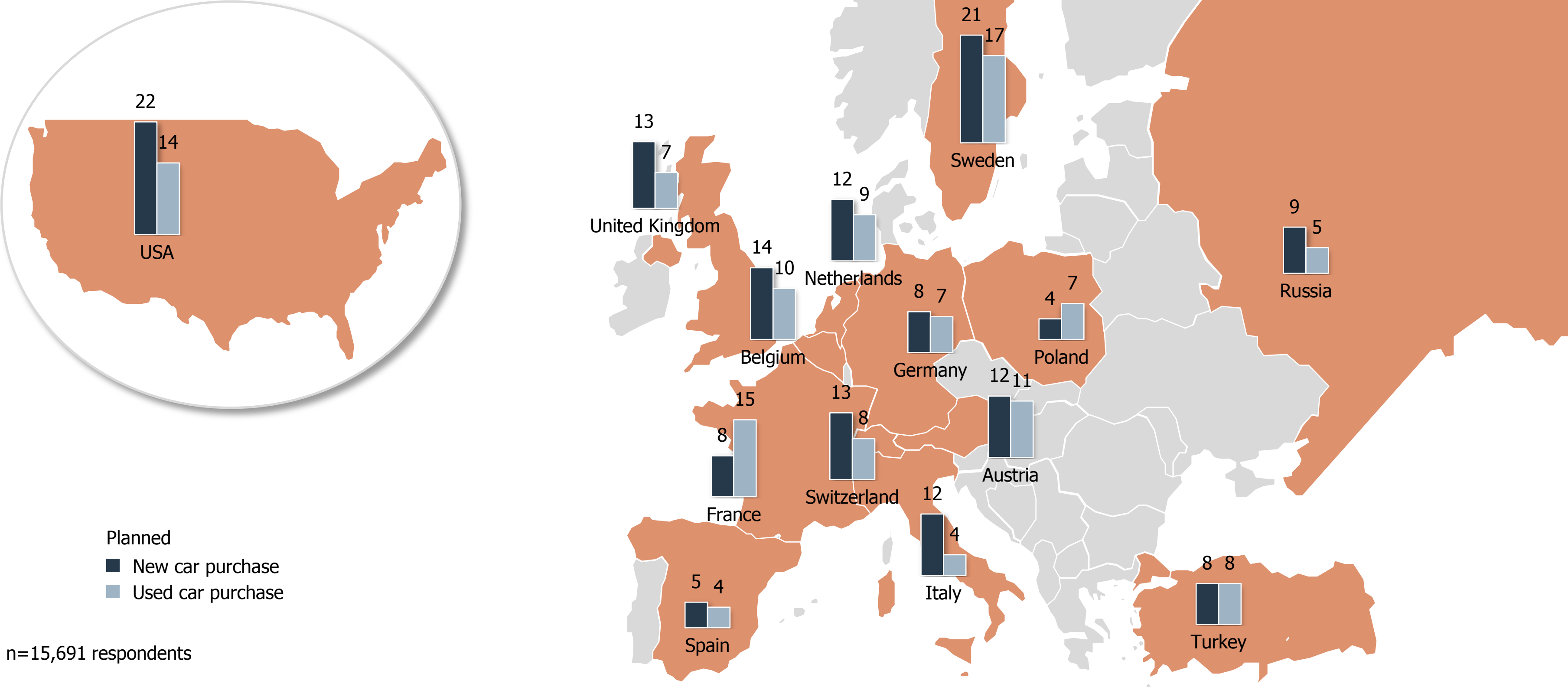
Planned car purchasing over the next 1 to 2 years

new and used cars, data in %



Planned
- New car purchase
- Used car purchase

Basis: n=15,691 respondents

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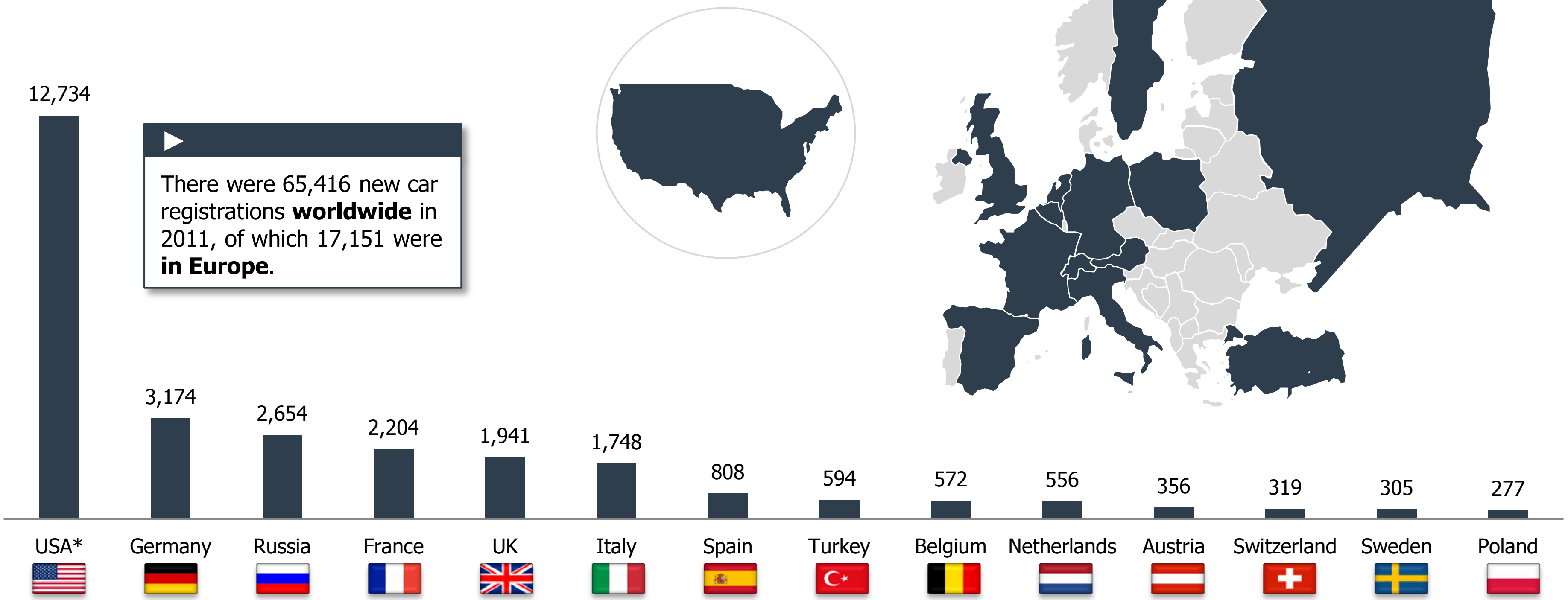
New car registrations

New car registrations 2011, data in thousands



There were 65,416 new car registrations **worldwide** in 2011, of which 17,151 were **in Europe**.

Source: VDA, ACEA 2012 / *incl. Light Commercial Vehicles. Cars: 6,089 (2011).

Overview of results

With approx. one third, **Sweden** and the **USA** occupy the top two places for planned car purchases in the comparison of the 14 countries surveyed for this study. In the EU countries of Austria, France, Belgium, the Netherlands, Great Britain and Switzerland, approx. one in five people said they intended to buy a new or used car. Contrastingly, in Germany, Italy, Turkey and Russia one in seven interviewed said they intended to buy a car within the next two years. Currently, the EU countries of Poland and Spain occupy last places as far as planning to buy is concerned. Only one in ten consumers can or wants to buy a new or used car in the near future.

New or used car? Whereas in more than half of the 14 polled countries new cars clearly dominated planned purchases, in Germany, Austria, Spain and Turkey new and used cars were equally balanced. However, in France and Poland the ratio of used cars to new cars planned for purchase is two to one.

Petrol or diesel engine? Overall, new cars with petrol engines dominated. This type of engine is most notably preferred in the USA, Switzerland, the Netherlands and Russia. The more economical diesel engine is more likely to be preferred in Sweden, Belgium, Austria, France, the United Kingdom and Italy, despite often being taxed more heavily. The very economical LPG / natural gas engine is most popular in the USA, Italy and the United Kingdom. Alternative drives, such as hybrid and electric, score more highly among consumers in the USA, Sweden, Belgium and the United Kingdom.

Results

SWEDEN

21%	10%	17%
New cars	Diesel	Used cars

At just over one fifth, the group that intends to buy a new car within the next two years is similarly high in Sweden and the USA. In the Scandinavian country, home to the traditional car makers Volvo and (returning soon) Saab, diesel engines are preferred by 10% of the prospective buyers; only 7% would prefer a car with a petrol engine. Including the 17% of consumers who intend to buy a used car, a total of 36% makes this the country with by far the greatest car purchasing potential in this 14-country comparison. In addition, at 4%, Sweden – along with the USA – shows the greatest interest in alternative drives, such as hybrid and electric. Average cubic capacity (1,825 cc) of new registrations and the proportion of four-wheel-drive cars (17%) are also significantly above the Western European averages of 1,635 cc and 8% respectively. On the whole, the intention to purchase a new or used car is highest (roughly 50%) in households with at least four persons.

USA

22%	16%	8%
New cars	Petrol	Electric / hybrid

The automobile industry in the USA is represented by three major manufacturers: General Motors, Ford and the Chrysler Group (now owned by Fiat). With the 2009 slump behind it, the US automobile market is now once again recording double-digit growth rates. As is the case in Sweden, more than one in every five in the USA intends to buy a new car in the near future. First choice here would be a car with a petrol engine (16%). However, already in second place we find hybrid and electric drives (8%), more than in any other of the countries in this study. 5% of US consumers expressed the intention to buy a new car powered by LPG or natural gas; along with Italy this is the highest proportion in this study. At 28%, planned new car purchasing is at its highest in the Pacific states of California, Oregon and Washington; at 10%, LPG / natural gas cars were also more often mentioned in these states in comparison with other regions. And whereas among 30 to 39-year-olds new cars are dominant (32%), the under-30s are more likely to buy a used car (29%).

Planned car purchasing in Sweden

Age groups - data in %

	Total	15-19 years*	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	21	27	18	24	31	18	12	20
Petrol engine	7	12	13	5	9	4	5	6
Diesel engine	10	0	5	15	19	10	5	11
LPG / natural gas engine	1	0	3	1	1	0	0	1
Electric / hybrid drive	4	15	0	6	4	6	2	4
Used cars	17	17	30	26	17	14	11	3

*small number of cases (n=65)
Basis: n=1,000 respondents

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Planned car purchasing in Sweden

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	21	14	17	24	29
Petrol engine	7	7	5	7	10
Diesel engine	10	7	8	11	15
LPG / natural gas engine	1	2	0	0	1
Electric / hybrid drive	4	2	4	6	5
Used cars	17	13	14	21	22

Basis: n=1,000 respondents

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Planned car purchasing in the USA

Age groups - data in %

	Total	18-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	22	22	32	19	20	19	14
Petrol engine	16	15	25	13	16	16	9
Diesel engine	4	8	4	2	5	2	2
LPG / natural gas engine	5	10	6	5	3	3	3
Electric / hybrid drive	8	7	12	9	6	6	3
Used cars	14	29	13	12	14	6	6

Basis: n=1,000 respondents

Planned car purchasing in the USA

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	22	12	18	29	30
Petrol engine	16	6	15	24	20
Diesel engine	4	1	2	8	6
LPG / natural gas engine	5	3	3	6	9
Electric / hybrid drive	8	6	7	6	11
Used cars	14	8	11	15	21

Basis: n=1,000 respondents

Results

AUSTRIA

12% New cars → 18% Styria | 11% Used cars

Although Austria does not have a domestic car make, the state of Styria is home to numerous car parts suppliers (“Styrian car cluster”) who also manufacture complete vehicles for some European manufacturers. It therefore comes as no surprise that in Styria the percentage of those planning to purchase a new car is the highest in the country at 18%. In contrast, Upper Austria would prefer used cars (14%). Consumers with a household net income of at least 2,400 euros and/or a household size of 4 or more people demonstrate the highest level of car purchase planning at 30%, although in Austria the percentages for new and used cars are roughly equal throughout all income groups. Diesel and petrol engines, at 6% and 5 % respectively, are also very nearly equal regarding planned purchases of new cars.

FRANCE

8% New cars | 15% Used cars → 26% 15-29 years

Thanks to Peugeot, Citroen and Renault, France’s automobile industry is particularly well represented in the small and mid-size car segments. However, as a result of the euro crisis, it is suffering from sales difficulties within the domestic market and in Southern European countries. However, the Peugeot 207 and the Renault Clio are still among the ten top-selling cars in the EU. Therefore, although in comparison with other countries France occupies 4th place when it comes to planned car purchases over the next one to two years, two out of every three consumers would prefer “just” a used car and not a new car; in the under-30s group the used-to-new ratio is even three to one. Planned car purchasing is dominated by new cars in Mediterranean regions only (13%). France’s automobile market is predominantly a diesel market: two of every three planned new cars are intended to have this type of engine. And if there are children in the household, planning for a used (second) car also increases to 20% in France.

GfK Verein

Planned car purchasing in Austria

Age groups - data in %

	Total	15-19 years*	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	12	14	10	11	10	11	14	13
Petrol engine	5	8	2	4	5	3	7	7
Diesel engine	6	5	7	7	4	6	8	6
LPG / natural gas engine	0	0	0	0	0	1	0	0
Electric / hybrid drive	1	0	0	1	1	1	0	1
Used cars	11	22	16	10	16	11	8	3

*small number of cases (n=76)
Basis: n=1,000 respondents

GfK Verein

Planned car purchasing in Austria

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	12	9	12	11	14
Petrol engine	5	6	6	2	5
Diesel engine	6	3	5	7	8
LPG / natural gas engine	0	0	0	0	0
Electric / hybrid drive	1	0	1	1	1
Used cars	11	6	6	16	18

Basis: n=1,000 respondents

Planned car purchasing in France

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	8	7	10	6	12	8	9	4
Petrol engine	2	1	2	0	1	2	5	0
Diesel engine	6	7	7	5	8	6	5	2
LPG / natural gas engine	0	0	0	0	1	0	0	0
Electric / hybrid drive	1	0	1	1	3	2	1	1
Used cars	15	27	25	20	15	11	9	5

Basis: n=1,001 respondents

Planned car purchasing in France

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	8	7	8	10	8
Petrol engine	2	2	3	2	0
Diesel engine	6	4	4	8	6
LPG / natural gas engine	0	0	0	1	0
Electric / hybrid drive	1	1	2	0	2
Used cars	15	11	12	17	22

Basis: n=1,001 respondents

GfK Verein

Results

BELGIUM

14%	19%	8%
New cars	Region Antwerp	Diesel

At 14 to 10%, the ratio of new to used car purchases in Belgium is almost directly inverse to that of its neighbour, France. Even though there is no domestic Belgian make of car, foreign manufacturers do have their own vehicle production facilities in Belgium e.g. Audi in Brussels, Ford in Genk (at least for the time being). At 21%, car purchase planning is about average when compared with the other countries, whereas a new car with diesel engine is preferred, especially among the self-employed and freelancers (19%). The under-30s are the much more likely to prefer a used car (20%). A higher rate of car purchase planning can be found in the Antwerp region (26%), as well as in the provinces of Hainaut and Liège (both 29%) and in the Brussels Region (25%). Households with children and those with four or more persons are also more likely to buy a used (second) car in the near future (13% and 17% respectively). And at 3%, interest in a new car with hybrid /electric drive puts Belgium in 3rd place when compared with the other countries.

SWITZERLAND

13%	18%	8%
New cars	East Central Switzerland/Zurich	Petrol

At 13%, the planned purchase of a new car by the Swiss rates just as highly as in Belgium, although 8% would prefer a car with a petrol engine. In Switzerland, the European country with the highest across-the-board purchasing power, primarily those consumers with a gross household income of 7,000 SFr. and more would like to buy a new car (19%), as would consumers living in the Zurich/Winterthur area (18%). Respondents in small localities with fewer than 5,000 inhabitants in the Alps and pre-Alps, on the other hand, are particularly likely to buy a used car (12%). And it is also predominantly the under-20s in Switzerland who would prefer a used car, whereas the 40 to 49 year-olds are those who rate highest in planning to buy a new car (18%). In Switzerland, however, in contrast with its neighbouring countries, the intention to purchase a new car rates more highly in households of two to three persons (15%). At an average of 1,829 cc, the cubic capacity of new registrations was, alongside Sweden, above the Western European average of 1,635 cc; the same applies to four-wheel-drive cars (26%).

Planned car purchasing in Belgium

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	14	19	13	20	15	18	10	5
Petrol engine	6	6	4	4	6	12	6	1
Diesel engine	8	12	10	18	8	6	6	2
LPG / natural gas engine	0	0	1	0	0	0	0	0
Electric / hybrid drive	3	1	4	2	3	5	1	2
Used cars	10	26	18	14	8	6	3	1

Basis: n=1,011 respondents

Planned car purchasing in Belgium

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	14	9	12	21	16
Petrol engine	6	4	6	12	3
Diesel engine	8	5	6	10	13
LPG / natural gas engine	0	0	0	1	0
Electric / hybrid drive	3	2	2	8	1
Used cars	10	4	6	10	17

Basis: n=1,011 respondents

Planned car purchasing in Switzerland

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60+ years
New cars (net)	13	15	13	12	18	10	10
Petrol engine	8	8	8	6	11	4	6
Diesel engine	5	6	5	6	7	4	3
LPG / natural gas engine	0	0	0	0	0	0	0
Electric / hybrid drive	2	2	1	2	2	2	3
Used cars	8	19	9	5	8	5	6

Basis: n=1,000 respondents

Planned car purchasing in Switzerland

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	13	10	15	15	12
Petrol engine	8	9	6	10	7
Diesel engine	5	1	8	6	4
LPG / natural gas engine	0	0	0	0	0
Electric / hybrid drive	2	3	3	1	1
Used cars	8	7	6	7	10

Basis: n=1,000 respondents

Results

THE NETHERLANDS

12%	18%	15%
New cars	Amsterdam, The Hague, Rotterdam	4+ person households

Cars were only produced in the Netherlands between 1959 and 1976, by DAF. At 452 cars per 1,000 inhabitants, the concentration of cars is below the EU average of 477 per 1,000 inhabitants. The three major cities of Amsterdam, The Hague and Rotterdam share the highest rate of intention to purchase new and used cars, at 18% and 13% respectively. The Netherlands market tends to favour petrol engines: for every one planned purchase of a car with a diesel engine there are 2.3 with a petrol engine. Although households with four or more persons rate highest in planning to buy a new car (15%), there is little difference in the Netherlands between households with and households without children in terms of planning to buy a car (13% and 11% respectively). There is also little difference between the age groups among the 20 to 69-year-olds regarding the intention to buy a new car in the near future. However, it is primarily the 20 to 40-year-olds in the Netherlands who would prefer a used car.

UK

13%	20%	23%
New cars	London, South-East England	16-29 years

The United Kingdom is one of the motor car's countries of birth, and the car industry still plays a key role there, albeit meanwhile mainly in the hands of foreign companies (BMW, TATA). Furthermore, sports cars and vintage cars look back on a long tradition in the United Kingdom (Jaguar, Aston Martin, Lotus, Triumph, MG, Rolls-Royce et al.). The proportion of planned purchases of new and used cars is highest in the south-east and the south-west of England, at one quarter; these two regions, with their strong purchasing power, also show the greatest interest in cars with LPG and hybrid drives (7%). The nationwide market for petrol and diesel engines is equally balanced at 6% each. The intention to purchase either a new or a used car is currently most prominent among the British under-30s (23% and 12% respectively). The average age of a car registered in the United Kingdom is 7.3 years, one year younger than the EU average (8.3 years).

Planned car purchasing in the Netherlands

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	12	9	14	14	12	12	12	6
Petrol engine	7	5	5	10	6	9	8	3
Diesel engine	3	4	8	2	4	2	3	0
LPG / natural gas engine	1	0	0	2	2	2	1	0
Electric / hybrid drive	1	0	2	1	2	1	1	3
Used cars	9	7	21	14	6	5	6	2

Basis: n=999 respondents

Planned car purchasing in the Netherlands

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	12	10	10	9	15
Petrol engine	7	7	5	5	9
Diesel engine	3	1	3	1	5
LPG / natural gas engine	1	1	0	2	2
Electric / hybrid drive	1	2	2	0	1
Used cars	9	8	9	9	9

Basis: n=999 respondents

Planned car purchasing in the United Kingdom

Age groups - data in %

	Total	16-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	13	23	14	10	13	8	5
Petrol engine	6	10	7	5	5	4	2
Diesel engine	6	9	7	4	6	5	2
LPG / natural gas engine	2	5	2	2	2	2	0
Electric / hybrid drive	2	3	3	1	4	2	1
Used cars	7	12	5	10	6	4	3

Basis: n=1,000 respondents

Results

ITALY

12%	15%	4%
New cars	100,000 and more inhabitants	L/ natural gas engine

Famous for its ground-breaking car designs, Italy is primarily a market for new cars: the new to used car ratio is roughly 3.5 to 1. Regionally, car purchase planning is distributed very evenly. However, there are differences between urban and the rural areas: whereas in cities with more than 100,000 inhabitants, 15% would buy a new car, only 8% of the people in localities with a maximum of 5,000 inhabitants would do the same. Moreover, when comparing countries, significantly more men than women in Italy would buy a new or used car in the near future (18% and 13% respectively). It is notable that cars with LPG / natural gas engines have been widespread in Italy for many years: every third planned new car is intended to have an engine of this kind. In addition, Italian car design also plays a role in consumer expectations: roughly two out of three men under the age of 40 expect their cars not only do drive well but to look good (see GfK Verein 2012). Furthermore, at 606 cars per 1,000 inhabitants, Italy ranks second in the EU, behind Luxembourg.

TURKEY

8%	18%	8%
New cars	South-East Anatolia	Used cars

As in Russia, the market for new registrations has in recent years been characterised by double-digit growth rates. At 0.8 new registrations, Turkey is on a similar level to Poland (0.7) and thus a long way below the EU average of 2.6 new cars per 100 inhabitants. The automotive and car parts industries also play an increasingly important role in industrial production. Alongside South-East Anatolia (18%), the intention to purchase a new car is also more prevalent in the regions of Marmara (Istanbul area) and the Black Sea (both 9%). Whereas the 30 to 39-year-olds are more likely to plan to buy a new car (11%), the 20 to 29-year-olds would prefer a used car (11%). A new diesel-engined car is more likely to be planned by consumers with university degrees (10%) and again in South-East Anatolia (9%). Furthermore, in Turkey car purchase planning in general is higher in households *without* children (17%) than in households with children (14%).

Planned car purchasing in Italy

Age groups - data in %

	Total	15-19 years*	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	12	20	13	13	9	15	12	6
Petrol engine	3	6	4	3	3	5	3	2
Diesel engine	5	4	8	4	4	4	7	3
LPG / natural gas engine	4	13	1	6	2	4	2	1
Electric / hybrid drive	1	2	0	0	0	3	0	2
Used cars	4	8	3	7	4	2	3	1

*small number of cases (n=54)
Basis: n=1,001 respondents

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Planned car purchasing in Italy

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	12	8	7	13	17
Petrol engine	3	2	2	4	6
Diesel engine	5	4	2	4	7
LPG / natural gas engine	4	1	2	4	5
Electric / hybrid drive	1	1	1	2	0
Used cars	4	4	3	4	4

Basis: n=1,001 respondents

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Planned car purchasing in Turkey

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years*
New cars (net)	8	5	10	11	9	4	3
Petrol engine	3	2	4	4	3	1	0
Diesel engine	4	3	5	6	5	2	3
LPG / natural gas engine	1	1	2	2	1	0	0
Electric / hybrid drive	0	0	0	0	0	1	0
Used cars	8	6	11	7	8	3	1

*small number of cases (n=75)
Basis: n=1,475 respondents

Planned car purchasing in Turkey

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	8	8	6	7	9
Petrol engine	3	2	2	3	3
Diesel engine	4	7	3	5	4
LPG / natural gas engine	1	0	1	1	1
Electric / hybrid drive	0	0	0	0	0
Used cars	8	11	7	7	8

Basis: n=1,475 respondents

GERMANY

8% New cars | 7% Used cars → 14% 3-person households

At 3.9 new registrations per 100 inhabitants, Germany is on a similarly high level to Austria and Switzerland (4.2 and 4.1 respectively). Furthermore, more than one third of cars produced in the EU are made in Germany, and roughly 800,000 workers are employed directly in the automotive industry. The currently largest age group of 40 to 49-year-olds is the most prominent when it comes to new car purchase planning (11%) and used car purchase planning (10%). In contrast with France or Switzerland, for example, car purchase planning in German cities of more than 100,000 inhabitants is overall roughly only half as high (11%) as in localities with fewer than 5,000 inhabitants (19%). In Germany, purchase planning for a new or used car is also well above average in households with three or more persons and households with children (19% respectively). And one in every two new cars planned for the near future is to have a petrol engine. As in Italy, roughly two out of three men under the age of 40 expect their cars not only to drive well but to look good (see *GfK Verein 2012*).

RUSSIA

9% New cars → 15% 20-39 years | 5% Used cars

As in Turkey, the market for new registrations has in recent years been characterised by double-digit growth rates. In Russia, it is notable that there is a large proportion of very old cars that will have to be replaced in the coming years. At 1.9 new registrations, Russia is on a similar level to Spain (1.8) and thus still below the EU average of 2.6 new cars per 100 inhabitants. Overall, the 20 to 40-year-olds are the most likely to purchase a car (23%), preferring a new model with petrol engine (13%). Consumers in the Moscow region (13%), the north-west (St. Petersburg) and in the far east (11% respectively) are the most likely to buy a new car. In Russia, as in other countries, households of at least three persons or households with children (12% and 13% respectively) demonstrate an above-average intention to purchase a new car. And those with a net household income of at least 15,000 roubles (approx. 375 euros) also show greater interest in a new car (15%).

Planned car purchasing in Germany

Age groups - data in %

	Total	14-19 years*	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	8	2	8	10	11	7	10	4
Petrol engine	4	2	4	6	4	4	5	4
Diesel engine	3	0	2	3	4	2	4	0
LPG / natural gas engine	0	0	0	0	0	1	1	0
Electric / hybrid drive	1	0	2	1	3	1	1	0
Used cars	7	12	11	4	10	7	4	3

*small number of cases (n=69)
Basis: n=1,008 respondents

Planned car purchasing in Germany

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	8	7	8	9	7
Petrol engine	4	3	4	4	4
Diesel engine	3	1	3	4	3
LPG / natural gas engine	0	0	0	0	0
Electric / hybrid drive	1	3	1	1	1
Used cars	7	2	6	14	9

Basis: n=1,008 respondents

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Planned car purchasing in Russia

Age groups - data in %

	Total	16-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	9	6	15	15	10	5	1	2
Petrol engine	7	5	13	12	7	3	1	2
Diesel engine	1	0	1	2	2	2	0	0
LPG / natural gas engine	0	0	0	0	0	0	0	0
Electric / hybrid drive	0	1	1	1	1	0	0	0
Used cars	5	10	9	6	5	4	2	0

Basis: n=2,189 respondents

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Planned car purchasing in Russia

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	9	4	6	12	11
Petrol engine	7	4	5	9	9
Diesel engine	1	0	1	2	1
LPG / natural gas engine	0	0	0	0	0
Electric / hybrid drive	0	0	0	1	1
Used cars	5	3	3	6	8

Basis: n=2,189 respondents

Results

POLAND

4% New cars → 12% Region Warsaw | 7% Used cars

Thanks to license manufacturing operations and the production facilities of Western European manufacturers (Fiat Auto Poland, Opel/GM, Volkswagen), the automotive sector in Poland plays an important role in the nation’s industry. Similarly to France, Poland also has a two-to-one ratio of planned used car purchases to planned new car purchases. At 0.7 new registrations, Poland is on a similar level to Turkey (0.8) – both still a long way below the EU average of 2.6 new cars per 100 inhabitants. The plan to purchase a new car ranks highest (9%) among 20 to 29-year-olds, as well as among white-collar workers and civil servants. In contrast, a new car with diesel engine is more strongly preferred among the self-employed and freelancers (5%). In the north (Gdańsk/Szczecin) and central regions (Warsaw), the intention to buy a new car is, at 14% and 12% respectively, significantly higher than the national average. And those with a net household income of at least 4,000 złoty (approx. 955 euros) also more often plan to buy a new car (9%).

SPAIN

5% New cars → 12% 20-29 years | 3% Diesel

Badly hit by the euro and economic crises, Spain currently brings up the rear when comparing countries in this study on car purchase planning: only 9% of consumers intend to buy a new or used car in the near future; at the beginning of 2010 the corresponding figure was still 12%. With diesel engines representing 70% of the market, it is of no surprise that 3% of the respondents would buy a new car with this type of engine. In small towns with a maximum of 50,000 inhabitants, 5% would prefer a diesel-engined vehicle. On the other hand, in the six Spanish cities that have more than 500,000 inhabitants, only 3% plan to buy a car at all. The 7% in the Basque/Navarre regions who would buy a new car, and the 13% in the Catalonia/Aragon regions who would buy a used car place these regions significantly above the Spanish average. At 23%, the under-30s rank highest when it comes to car purchase planning. And in Spain it is also households with four or more persons that are by far the most willing to buy a new or used car (9% and 6% respectively).

Planned car purchasing in Poland

Age groups - data in %

	Total	15-19 years	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	4	2	9	4	4	2	2	3
Petrol engine	1	0	3	2	1	1	1	1
Diesel engine	2	0	4	2	2	0	1	2
LPG / natural gas engine	1	2	3	1	1	1	0	0
Electric / hybrid drive	0	0	0	0	1	0	0	0
Used cars	7	11	9	10	11	5	0	4

Basis: n=1,000 respondents

Planned car purchasing in Poland

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	4	2	4	3	5
Petrol engine	1	0	2	1	2
Diesel engine	2	2	2	1	2
LPG / natural gas engine	1	0	1	1	2
Electric / hybrid drive	0	0	0	0	0
Used cars	7	4	5	10	8

Basis: n=1,000 respondents

Planned car purchasing in Spain

Age groups - data in %

	Total	15-19 years*	20-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70+ years
New cars (net)	5	11	12	5	4	3	2	0
Petrol engine	1	1	4	1	1	1	0	0
Diesel engine	3	7	8	4	3	2	2	0
LPG / natural gas engine	0	0	0	0	0	0	0	0
Electric / hybrid drive	0	2	1	0	0	1	0	0
Used cars	4	20	9	5	3	2	1	0

*small number of cases (n=54)
Basis: n=1,007 respondents

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Planned car purchasing in Spain

Household size - data in %

	Total	1-person households	2-person households	3-person households	4 or more person households
New cars (net)	5	1	3	5	9
Petrol engine	1	0	1	1	3
Diesel engine	3	1	2	3	6
LPG / natural gas engine	0	0	0	0	0
Electric / hybrid drive	0	0	0	1	0
Used cars	4	3	5	3	6

Basis: n=1,007 respondents

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About the report and study

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Study profile

Data collection methodology

GfK Globo Bus

Method: CATI except for Poland and Spain (CAPI) and Russia and Turkey (PAPI).

Data collection period

January 2013

Russia: February / March 2013

Consumption crisis typology:

crisis-resistant applies to those that claim to be able to cope well and in whose household nobody is threatened with unemployment. On the other hand, *crisis-prone* applies to consumers who are just about able to get by or who are unable to make ends meet, or in whose household somebody is threatened with unemployment. Those who claim to be able to cope on the whole are usually described as being consumers *in a tense financial situation* (source: GfK Consumption Trend Sensor 2012, published by GfK Verein).

Sample

	Number of interviews	Age
Belgium	1,011	15+
France	1,001	15+
Germany	1,008	14+
Italy	1,001	15+
The Netherlands	999	15+
Austria	1,000	15+
Poland	1,000	15+
Russia	2,189	16+
Sweden	1,000	15+
Switzerland	1,000	15+
Spain	1,007	15+
Turkey	1,475	15-69
UK	1,000	16+
USA	1,000	18+

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