2022 WORKSHOP SURVEY

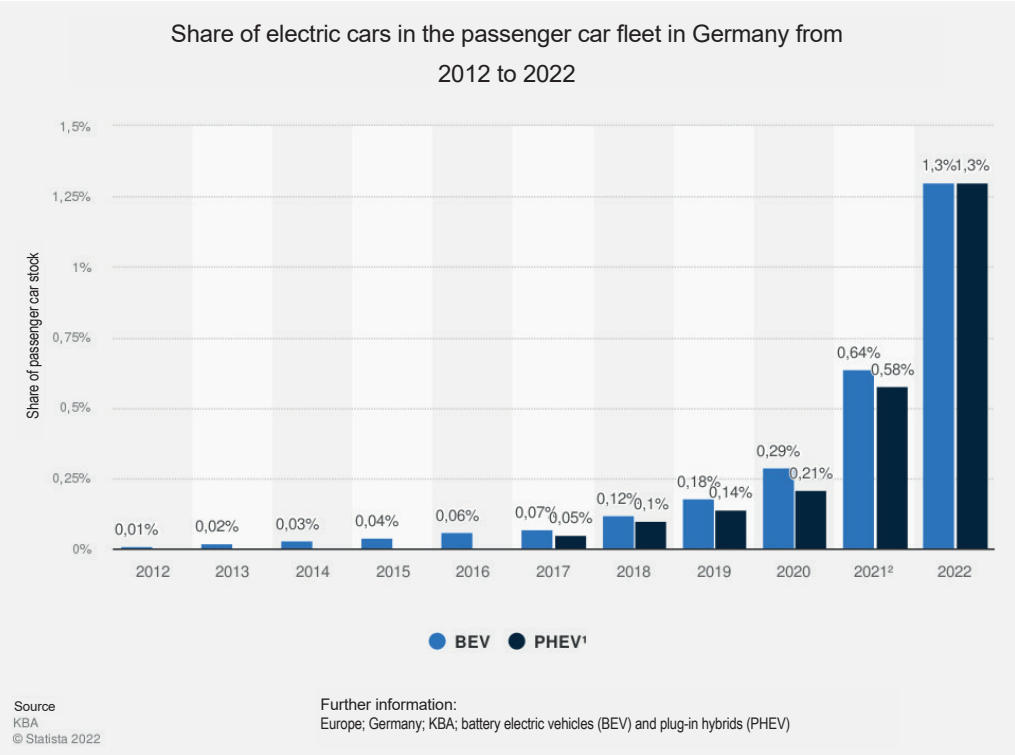
ON ELECTROMOBILITY

Qualität
ist Mehrwert

Introduction

The share of electric cars and plug-in hybrids has increased significantly in Germany over the past three years. Meanwhile, 2.6% of vehicles in Germany are (also) electrically powered. The latest new registrations show that this share will continue to grow in the future. In May 2022, 11.2% of new registrations were plug-in hybrids and 14.1% were electric vehicles (source: Federal Motor Vehicle Office). Our major workshop survey in 2019 showed that electromobility had already arrived in independent workshops. However, it was equally clear that the independent market was skeptical about electromobility. With this year's survey by the Qualität ist Mehrwert initiative, we wanted to know: How has the repair and maintenance volume of electric and hybrid vehicles developed over the last three years and how do independent workshops view the sector?

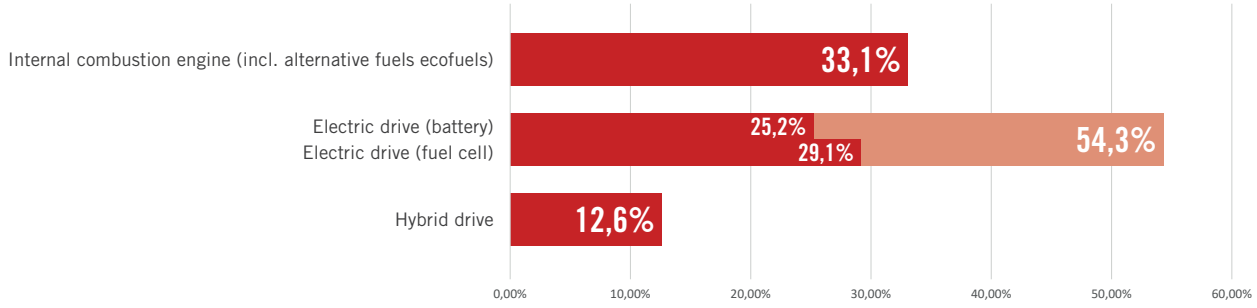
To this end, we launched a new survey about electromobility with the same and new questions for the independent market. Until May 30th, 2022, a total of 509 workshops took part in this survey. The comparative figures from 2019 given in the white paper are from the survey at that time. Back in 2019, 685 employees of independent automotive workshops had taken part in the survey until February 28th.



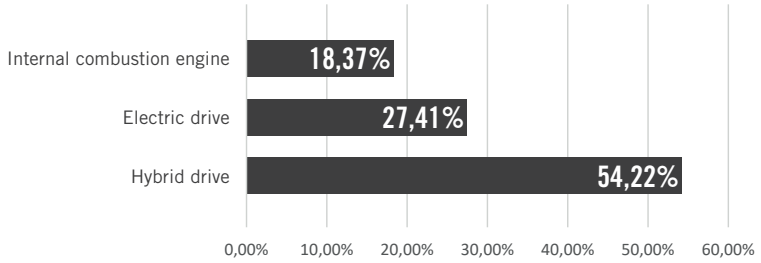
Note: Most of the workshops that took part in the survey were independent workshops for which quality is a central element of their corporate philosophy and for which a basic interest in electromobility must be assumed. The survey results may therefore be biased with regard to a high level of quality awareness. Nevertheless, the results provide an excellent insight into the current state of the industry about electromobility.

WHICH DRIVE WILL PREVAIL?

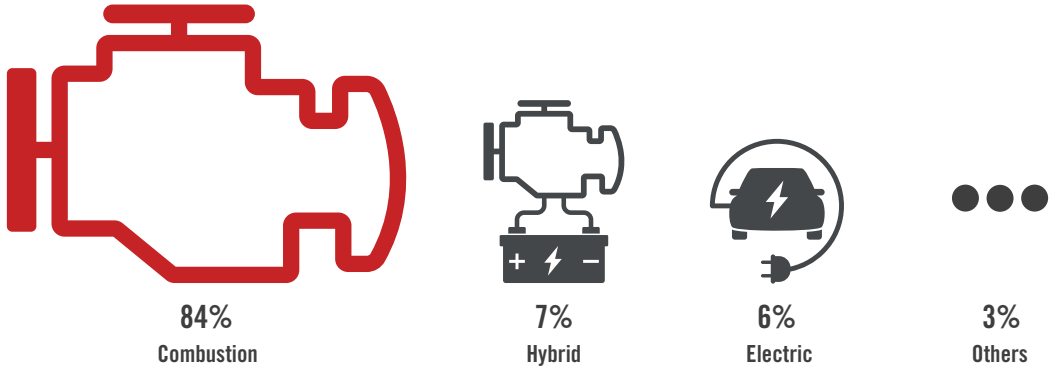
2022



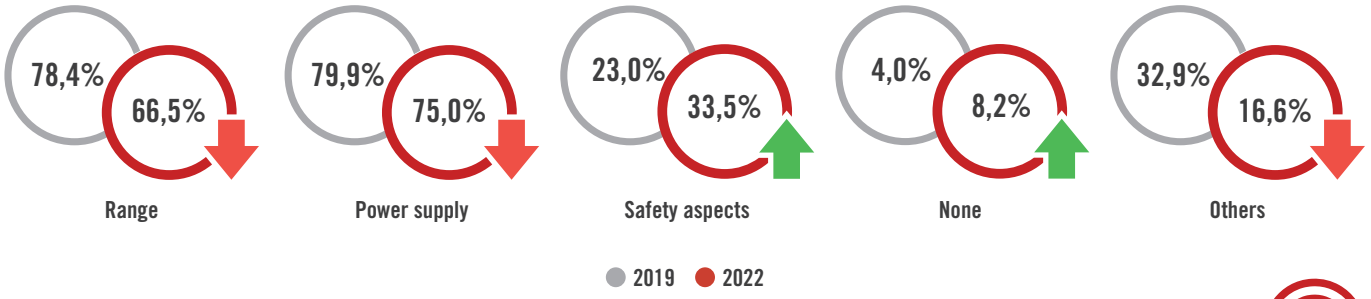
2019



WHAT DOES YOUR CUSTOMER STRUCTURE CURRENTLY LOOK LIKE? (IN PERCENT)



IN YOUR VIEW, ARE THERE ANY OBSTACLES TO ELECTRIC MOBILITY? IF SO, WHAT ARE THEY?



Source: Qualität ist Mehrwert survey results 06/2022

8 theses on electromobility in independent workshops

1 The industry is divided

About 60% of the surveyed workshops are qualified for the repair of electric vehicles and have the necessary equipment. This share has not changed compared to 2019.

2 Electromobility is represented in the free market

According to their own information an average of 84% of customer vehicles have an internal combustion engine, the remaining 16% are other drive systems.

3 Effects are estimated differently

66 % of the workshops fear a reduction in the amount of work due to electromobility. 31 % of those surveyed hope for additional income opportunities. In 2019, it was still 7 %.

4 Concern about their own business

48% of respondents expect less work due to the growing proportion of electrically vehicles in their own workshop.

5 Number of charging stations at independent workshops tripled

Meanwhile, 28% of the surveyed independent workshops have a charging station on their premises.

6 Further investments planned

43% of the workshops surveyed are planning further investments in the next 12 months. Further 21% said that they planned to invest in the next 3 to 5 years.

7 Trade media are Information channel No. 1

The popularity of trade media as an information channel on electromobility has increased significantly. At 68%, trade media are the most popular source of information in the industry.

8 Need for information and support remains high

Compared with the situation three years ago, the need for information and support remains high. The areas, in which independent workshops information and support, are diverse.

1. The industry is divided

As was the case in 2019, in 2022 59% of workshops report that they are qualified to repair electric vehicles. The remaining 40% of respondents see only a partial need, to expand their expertise in this area. This reveals a clear split in the industry: While around two thirds are actively involved in the topic of electromobility and are expanding their know-how as well as their workshop equipment to this end, one-third of the workshops surveyed have not yet made electromobility part of their day-to-day business. Slightly more than half (54%) of those, who do not yet repair electric vehicles in their workshop are planning further training.

This leaves around 20% of the workshops surveyed that apparently do not wish to address the issue of electromobility in the future. The reasons for this rejection vary. For example, some survey participants state that the market share is still small and that their own working time is limited, so that further training in this area is no longer worthwhile. Another group considers electromobility to be a temporary phenomenon. The participants are not alone in this assessment. Whereas in 2019, 82% were still of the opinion that electric drives would prevail, now the figure is only 67%. 33% of respondents in 2022 are convinced that the internal combustion engine with alternative fuels (e.g. ecofuels) will prevail.

2. Electromobility is represented in the free market

Even though the market share is increasing, currently according to the German Federal Motor Vehicle Authority, just under 3% of the vehicles in Germany are electrically powered vehicles. Customers‘ vehicles in the workshop are assessed differently by the respondents. According to their own assessment, 84% of their customer vehicles are equipped with combustion engines, 7% with hybrid and 6% with electric drives.

Thus, the share of electrically powered vehicles in independent workshops already appears to be quite high. If new registrations continue to develop as they have in recent months, it can be assumed that this proportion will continue to increase significantly in the foreseeable future.

3. Effects are estimated differently

Is electromobility seen as an opportunity or a risk? Over the past three years, there has been no noticeable change in the attitude of the industry: in 2019, 67% of those surveyed feared a declining workload. With only one percent less (66%), the proportion is still similarly high three years later.

The situation is different, however, when it comes to estimating of additional income opportunities due to the growing complexity: While 7% of respondents expected electromobility to increase their income opportunities in 2019, so do 31% of respondents in 2022.

It is noticeable that the 31% mentioned above have had above-average contact with electric vehicles. They state that they have more alternative drives in the workshop and that they are more often qualified for the work.

It is possible that this leads to the conclusion that the feared decrease in the workload is in reality offset by additional income opportunities and thus the economic concerns of the independent workshops are much less noticeable in reality.

4. Concern about their own business

Despite the positive response from independent workshops that are already working increasingly with electrically powered vehicles, half of the independent workshops continue to fear negative effects on their own business: 48% expect less work to be done as a result of the growing proportion of of electrically powered vehicles.

Other side effects are also viewed critically: 51% of the participating workshops state that it will become more difficult to find qualified personnel. 57% see the need of increased investments.

5. Number of charging stations at independent workshops tripled

A pleasing development can be seen in the willingness of independent workshops to set up a charging infrastructure. While in 2019 only 10% stated that their own premises had a charging station for electric vehicles, just three years later, this figure had already risen to 28%. Another 51% of the workshops are thinking about it and can basically imagine investing in a charging station. Only 21% of those surveyed reject the idea of a charging station on their own company premises.

6. Further investments planned

In line with the assessment that investments are needed to competently handle maintenance and repairs on electrically powered vehicles, the majority of the market is positioning itself: 64% of workshops said they plan to invest in hardware, such as tools and equipment and/or training within the next five years. Most independent workshops are planning these investments already in the next 12 months. 10% of respondents in 2022 are still undecided whether to invest further, 26% have no further investments planned.

The majority (60%) of respondents who say they have no plans to invest, indicate that the topic of electromobility is not relevant to them. Among the answers as to why this is the case, two main reasons can be identified:

1. The current market penetration in combination with their own working hours up to their retirement is not considered relevant.

2. Electromobility is seen as a temporary drive system, so that no investments of any kind are planned.

7. Trade media are information channel no. 1

At 68% trade media are the most popular source of information in the industry. The popularity has increased significantly compared to 2019. Three years ago, only 38% of respondents cited that trade media as a source of information on electromobility.

In addition to trade media, the Internet (62%), wholesalers (51) and trade shows (51%) continue to be used as sources of information. The quality of information seems to be well received in the industry. In 2019, only 50% of participating workshops responded that they felt sufficiently prepared for electromobility.

This percentage has increased to 62% over the past three years. (Recommended trade media include Krafthand, Kfz-Betrieb, AMZ, asp, Freie Werkstatt).

8. Need for information and support remains high

Despite the positive development in the self-assessment of independent workshops, the need for information and support within the sector remains high. 39% of the workshops surveyed would like more information and support from partners. There is still a relevant need for information on detailed topics, such as the insurance required for workshops, disposal options and costs for individual parts as well as restrictions on repair options due to manufacturers‘ rental models for battery systems.

Experience over the past three years has also revealed other areas where independent workshops would like detailed information or active support. These include:

- Support programs/subsidies from the government
- Support from suppliers and partners, in order to communicate to customers that independent workshops are qualified to repair electric vehicles

- More information and training from manufacturers
- More engagement from aftermarket suppliers, so that vehicles can be competently serviced not only in OES workshops
- Information and support on increased space requirements
- Improvement of the spare parts supply situation for electrically powered vehicles
- Information on the selection of lifting platforms

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Electromobility has arrived in the independent market. The majority of independent workshops are well prepared for customers with electrically powered vehicles and already have a relevant share of customers. In terms of both equipment and expertise, the independent workshops have caught up considerably and can keep up with authorized workshops.

The industry must continue to actively support independent workshops on this path. Besides, they have to promote the skills and expertise of the independent market to customers, so that customers with electric vehicles build up trust in independent workshops.

In addition to the challenge of competing with authorized workshops in the field of electromobility, the greatest challenges lie in the area of increased investment, the omnipresent shortage of skilled workers as well as the decreasing maintenance effort for electric vehicles. Also in these areas, independent workshops must be actively supported with smart ideas and concepts.

About the initiative Qualität ist Mehrwert

Qualität ist Mehrwert is an initiative of well-known manufacturers of automotive parts in the automotive aftermarket. The aim is to significantly increase quality awareness in vehicle repair. To this end, the benefits of quality parts are demonstrated to automotive and commercial vehicle workshops, the parts trade and motorists - with information material, at events and on the website.

All partners, current dates and information are available on the Internet at:

qualitaet-ist-mehrwert.de

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