



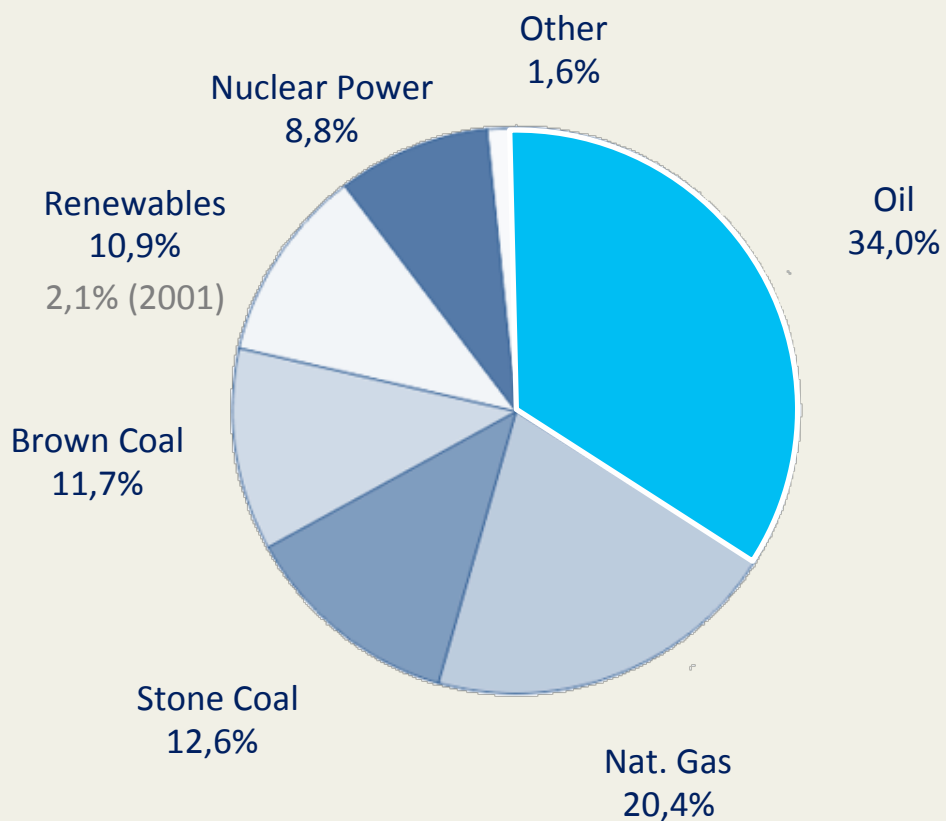
# *Vom Ende der Verkehrswahl wie wir sie kannten*

20.11.2014

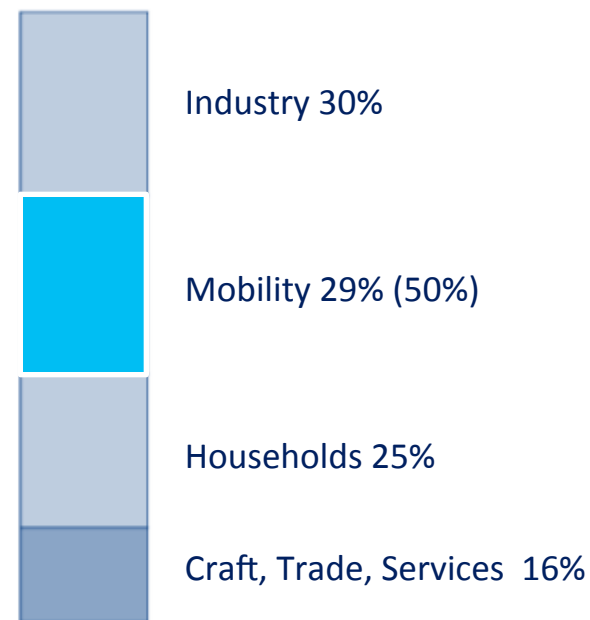
Prof. Dr. Andreas Knie



## Structure of Primary Energy Consumption

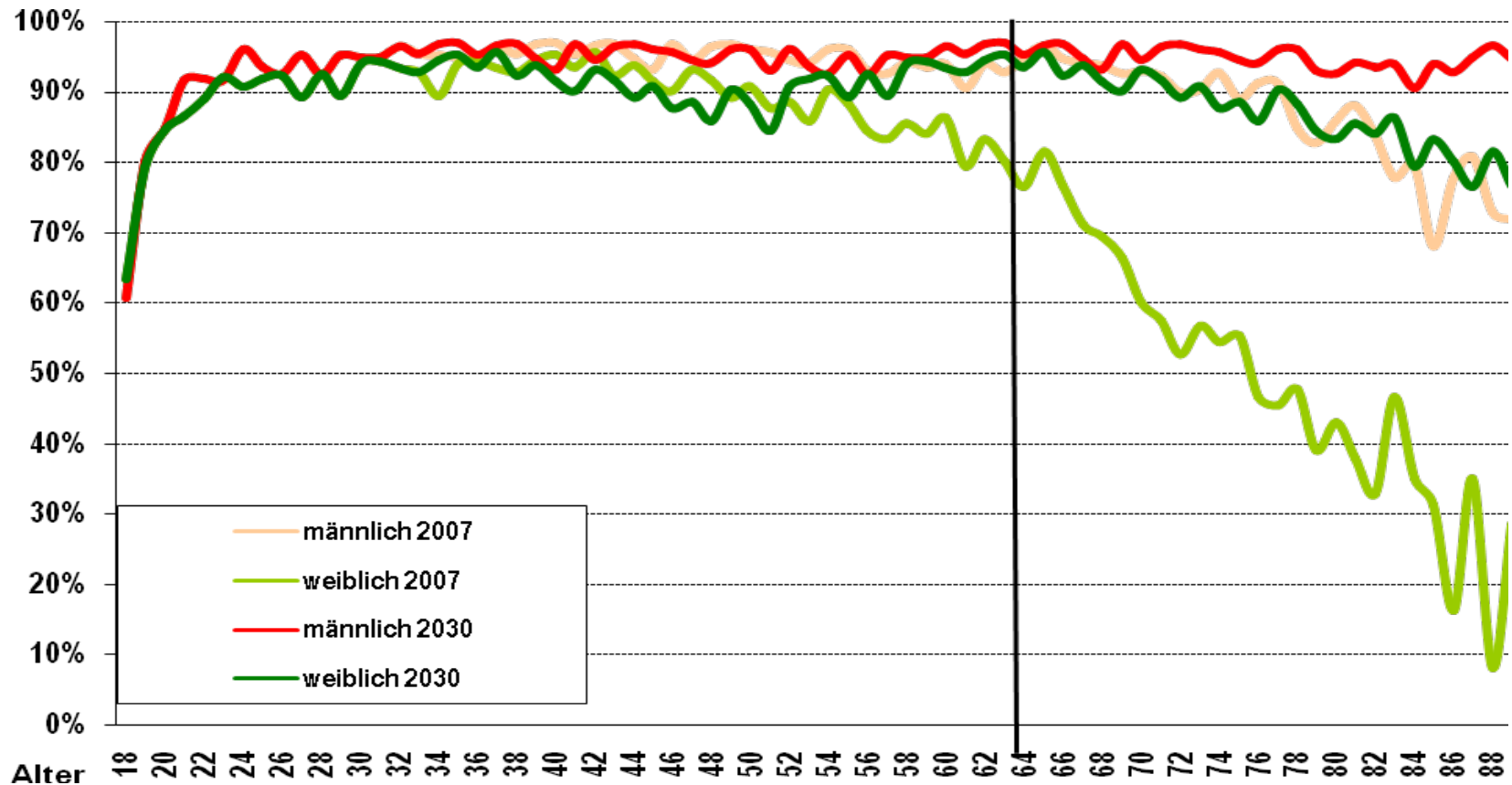


## Percentage of Consumption of End-Use Energy



Source: UBA, Destatis 2012

## Forward projection of the driving license possession until 2030

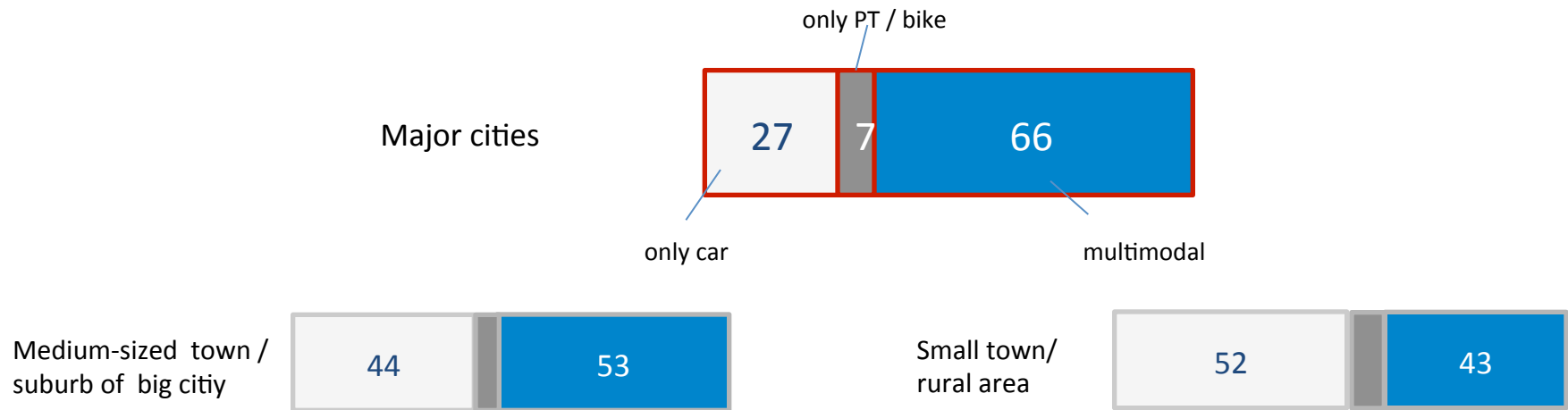


Quelle: Berechnung InnoZ nach Daten MiD 2002

<b>in Mrd. PKM</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Trains	79,1	82,5	82,3	84	85,4	88,8	88,7
Public Transport	81,3	79,6	78,6	78,1	78	76,0	76,1
Air Planes (within Germany)	10,6	11,0	10,6	10,7	10,6	10,3	9,9
Automobiles	883,4	888,5	898,7	902,4	912,4	913,2	923,3
<b>Total</b>	<b>1054,4</b>	<b>1061,6</b>	<b>1070,2</b>	<b>1075,2</b>	<b>1086,4</b>	<b>1088,3</b>	<b>1098,0</b>

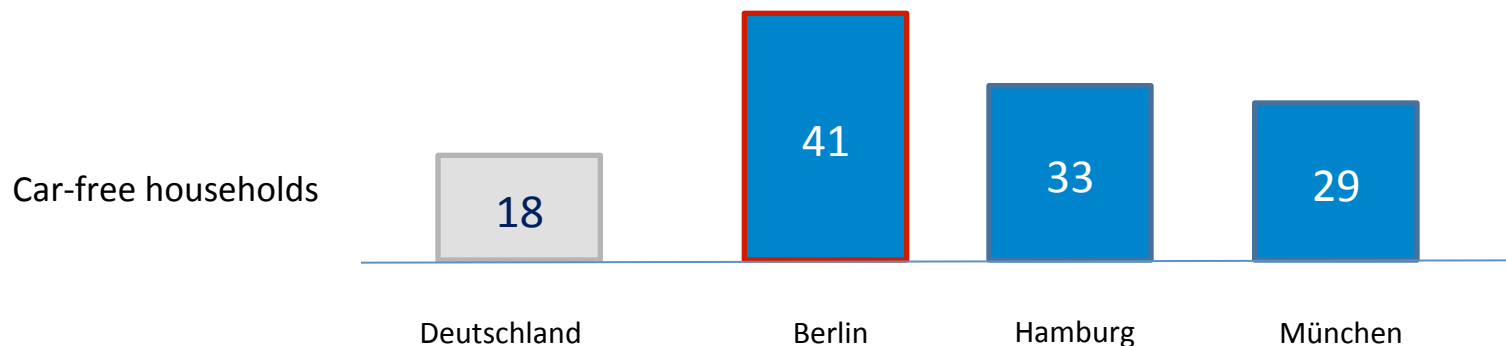
Quelle: DIW, InnoZ

## Means of transport usage in Germany (in %)



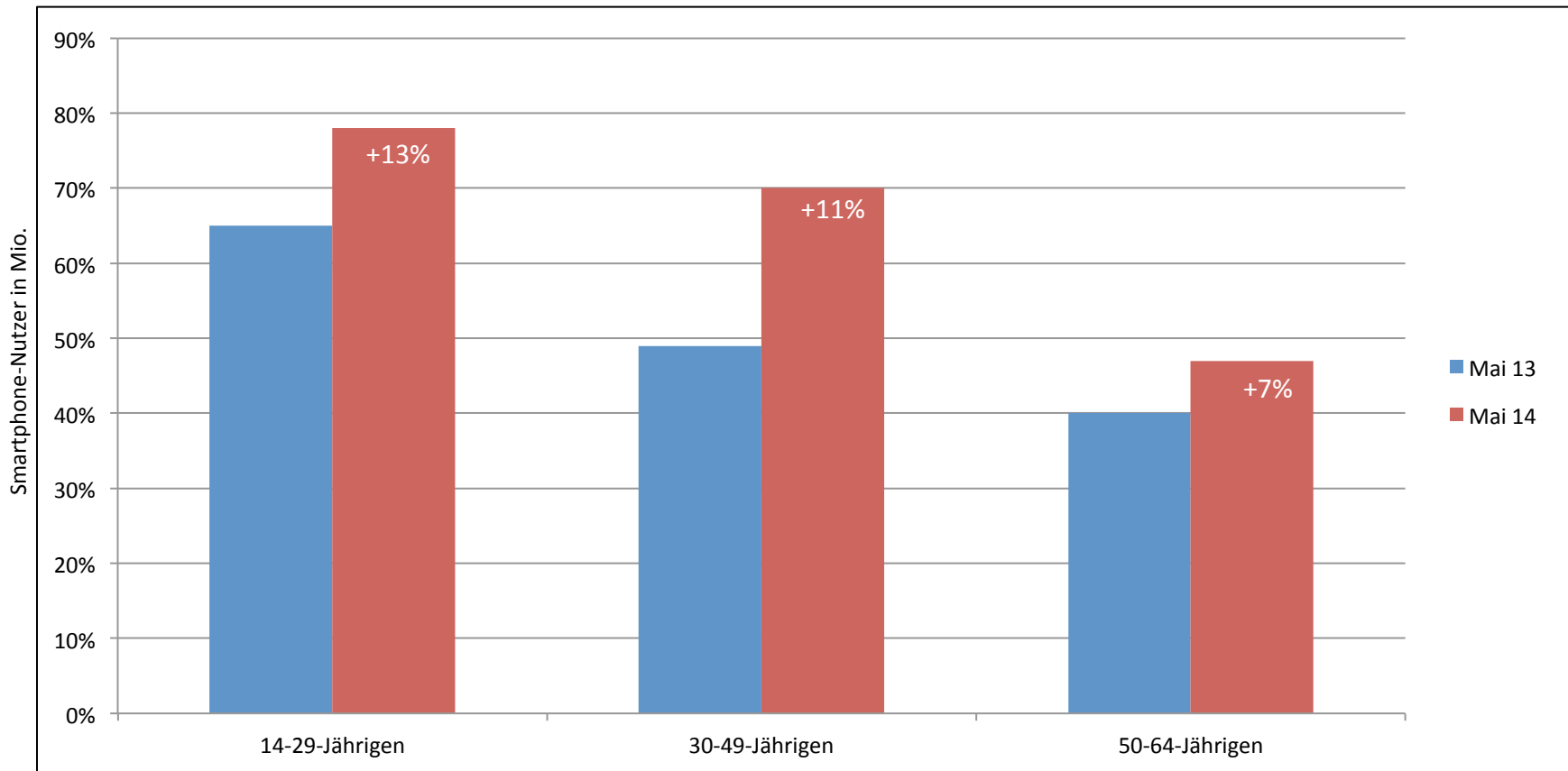
Source: infas 2012

## Car-free households (in %)



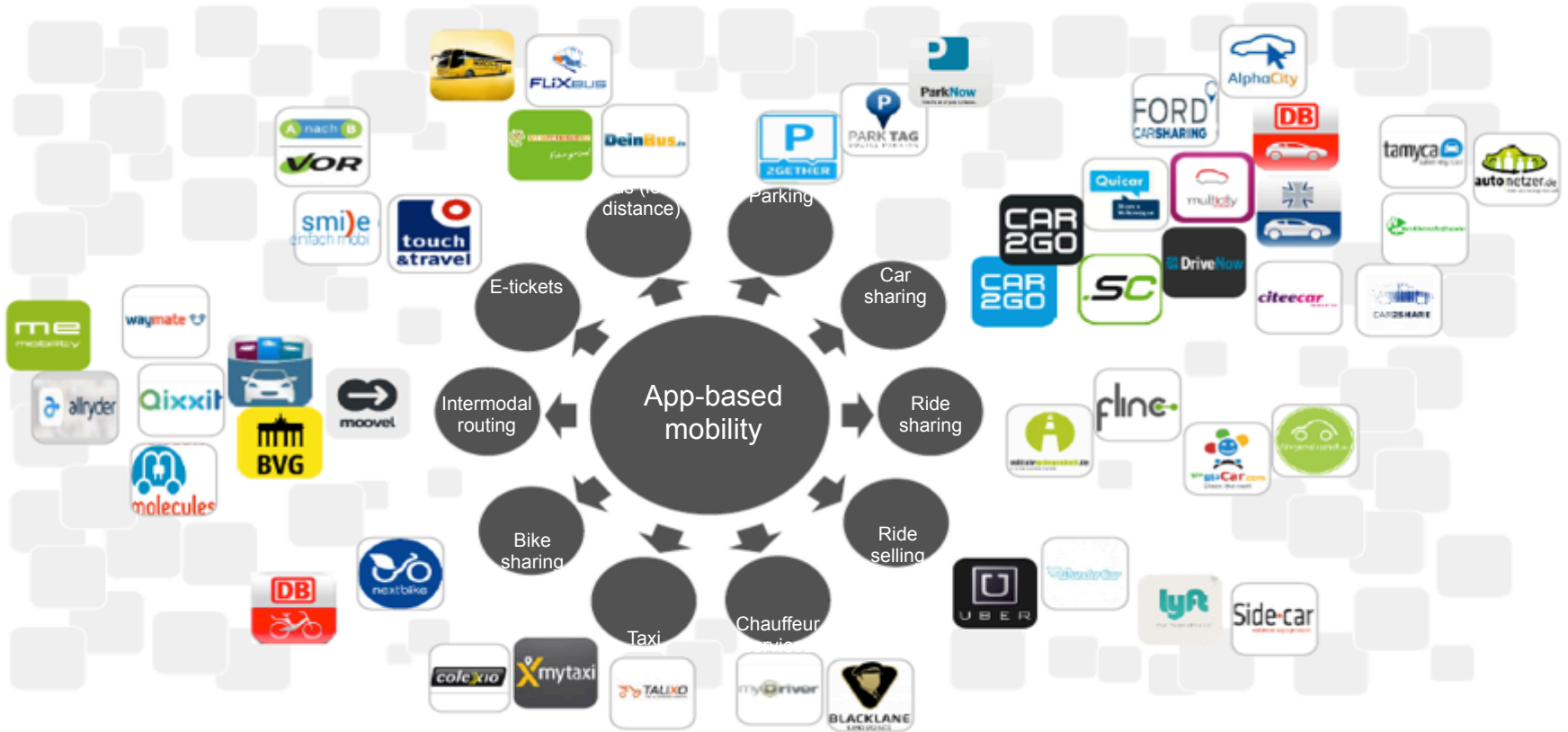
Source: infas 2012

## Zuwächse der Smartphone-Nutzung nach Altersgruppen



Dt. Smartphone-Besitzer ab 14 Jahren; n = 1.004

Quelle: Bitkom 2014

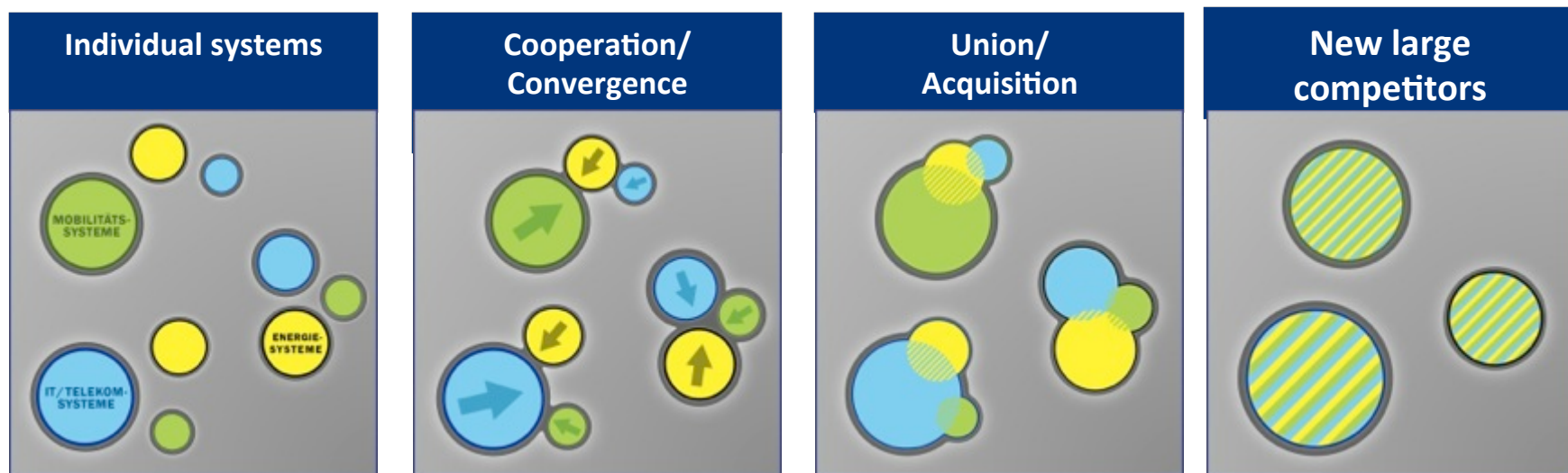




- \* Der Markt der Multimodalen (Metromobile) wächst in Städten und Ballungsräumen**
- \* Geräte „fallen“ ins Netz; das „Physische“ wird durch das „Digitale“ bespielt**
- \* Die „digitale Signatur“ des hier und jetzt, entscheidend über die Präsenz im Kopf**
- \* Die Wertschöpfungsanteile verschieben sich, die Digitalen „bestellen“ (bestimmen) das Physische, Branchen pulverisieren**

# The digital revolution is changing everything

● Mobility   
 ● IT-/telecommunication   
 ● Energy



time →

- Relatively unrelated individual systems and market delimitation – Transport instead of mobility
- Well-known players with their own markets

- Intermodality, e-mobility and energy shift lead to new mobility services
- New business opportunities for players from outside the sector

- Players from outside the sector offer new mobility services and other services
- New segments emerge, markets mix up

- New big players on the market – complete offer
- Mobility taken further than today – Competition for client data and service level