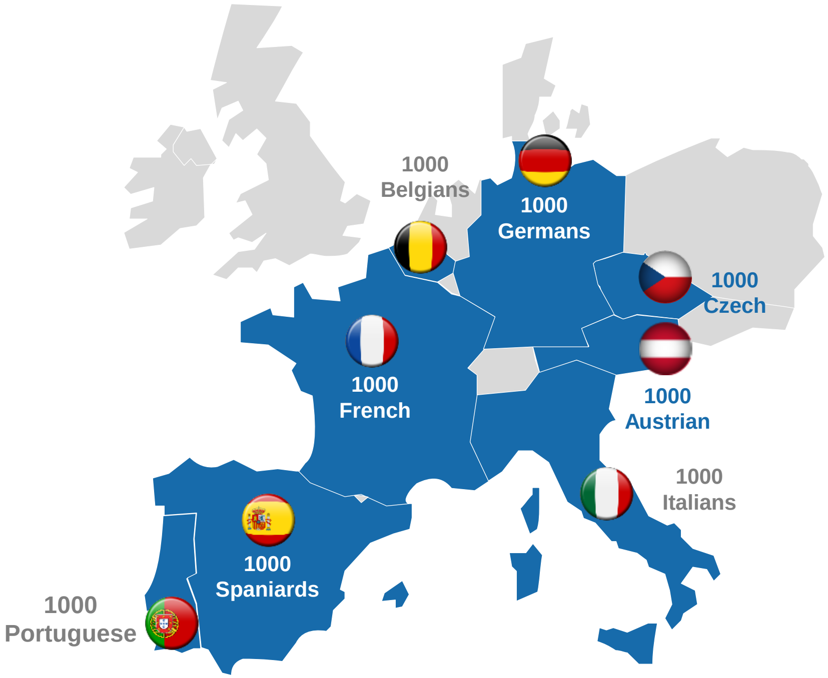
MOBILITY BAROMETER AMONG EUROPEANS

APRIL 03RD 2024

SCOPE OF THE SURVEY



8
countries

8000
interviews

Details in the next page

METHODOLOGY

Samples
In each country, representative sample of the population 18+
Quotas on gender, age, profession, region and market size.

Timeline
The field studies were carried out between December 14th 2023 - January 18th, 2024

Method of data collection
Online survey in the 8 countries

READING NOTE: We present, in this report, two types of significative differences:

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

XX Significantly lower result in the country compared to EUROPE

Evolutions between 2023 and 2022 results

XX Significantly better results in 2023 compared to 2022. Only on the same 6 countries tested in 2022.

XX Significantly lower result in 2023 compared to 2022. Only on the same 6 countries tested in 2022.

1.

MOBILITY HABITS IN EUROPE

1.1
CURRENT MOBILITY HABITS

AS LAST YEAR, WALKING AND USING A PERSONAL CAR ARE THE MOST WIDESPREAD MODES OF TRANSPORTATION ON WEEKDAYS

MODES OF TRANSPORTATION USED ON WEEKDAYS

	EUROPE								
Walking	33 / 92	21 / 86	28 / 86	31 / 94	36 / 92	26 / 91	41 / 96	37 / 96	43 / 97
A personal car	28 / 81	25 / 77	23 / 80	31 / 81	37 / 91	35 / 83	23 / 81	27 / 82	23 / 71
Public transportation	16 / 52	16 / 47	12 / 38	14 / 58	15 / 42	15 / 42	15 / 57	22 / 69	19 / 66
Personal standard bicycle	9 / 35	8 / 35	7 / 25	11 / 43	14 / 44	5 / 20	6 / 25	10 / 48	8 / 36
Car pooling	6 / 20	4 / 15	4 / 15	7 / 19	6 / 16	4 / 19	6 / 17	7 / 23	7 / 32
Personal electric bicycle	6 / 18	8 / 28	5 / 15	8 / 25	8 / 22	3 / 9	4 / 11	8 / 24	5 / 14
A company car	8 / 17	8 / 18	6 / 13	8 / 18	7 / 17	10 / 21	7 / 15	8 / 19	9 / 18
Car sharing	6 / 17	5 / 12	4 / 11	5 / 14	10 / 23	4 / 22	6 / 15	5 / 16	6 / 18
Motorbike / two-wheel scooter	5 / 16	5 / 14	4 / 12	7 / 17	8 / 24	4 / 13	4 / 15	7 / 20	4 / 11
Shared bicycle or stand scooter	5 / 16	4 / 13	4 / 12	7 / 22	8 / 20	3 / 12	4 / 13	7 / 25	4 / 12
Personal Stand scooter	5 / 13	4 / 12	4 / 12	4 / 13	6 / 16	3 / 10	5 / 12	5 / 16	4 / 12
Taxi / ride-hailing	4 / 19	3 / 12	3 / 11	5 / 19	5 / 18	4 / 23	6 / 25	4 / 25	4 / 17

Q1 – On average, on a normal weekday (Mondays to Fridays), how long do you use each one of the following modes of transportation each day? Base : All

More than 1 hour a day | used

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EXCEPT IN PORTUGAL, MODES OF TRANSPORTATION ON WEEKDAYS ARE QUITE STABLE IN EUROPE

MODES OF TRANSPORTATION USED ON WEEKDAYS

%Used Evolutions in points vs 2022	EUROPE								
Walking	=	=	-4	+1	-2	-2	+1	-	-
A personal car	**+1**	+1	-3	+5	=	-2	+3	-	-
Public transportation	=	+6	-1	+4	-1	-6	+2	-	-
Personal standard bicycle	**-3**	-1	-5	+1	-1	-13	-3	-	-
Car pooling	=	+7	+1	=	+4	-9	-5	-	-
Personal electric bicycle	**+1**	+6	-1	+2	+3	-6	-3	-	-
A company car	=	+5	=	+3	+2	-5	-3	-	-
Car sharing	=	+5	+1	+1	+7	-9	-2	-	-
Motorbike / two-wheel scooter	=	+5	-1	+1	+3	-4	-3	-	-
Shared bicycle or stand scooter	=	+6	=	=	=	-4	-3	-	-
Personal Stand scooter	=	+6	+1	+1	+3	-3	-3	-	-
Taxi / ride-hailing	**+1**	+7	=	+1	+2	-4	-2	-	-

NEW

Q1 – On average, on a normal weekday (Mondays to Fridays), how long do you use each one of the following modes of transportation each day? Base : All

XX significantly superior to 2022
XX significantly inferior to 2022

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A SIMILAR USE OF MODES OF TRANSPORTATION ON WEEKENDS

MODES OF TRANSPORTATION USED ON WEEKENDS

	EUROPE								
Walking	34 / 88	23 / 82	28 / 81	34 / 88	36 / 86	27 / 88	43 / 92	39 / 94	45 / 93
A personal car	29 / 79	25 / 78	26 / 79	27 / 77	39 / 87	36 / 83	28 / 80	29 / 78	24 / 72
Public transportation	10 / 41	9 / 36	8 / 31	10 / 47	10 / 32	8 / 28	10 / 47	14 / 58	11 / 52
Personal standard bicycle	8 / 32	7 / 31	7 / 26	10 / 39	11 / 40	6 / 22	7 / 24	9 / 42	10 / 36
Personal electric bicycle	6 / 18	7 / 28	5 / 14	8 / 24	7 / 20	3 / 10	3 / 12	8 / 24	5 / 13
Car pooling	4 / 17	3 / 12	3 / 12	4 / 16	4 / 15	3 / 14	4 / 16	5 / 19	6 / 28
Taxi / ride-hailing	3 / 16	4 / 13	3 / 10	4 / 16	5 / 17	3 / 18	3 / 22	4 / 21	2 / 16
Motorbike / two-wheel scooter	5 / 15	4 / 13	3 / 12	5 / 16	7 / 22	4 / 13	4 / 15	6 / 19	4 / 11
Car sharing	4 / 14	2 / 11	3 / 9	4 / 13	6 / 21	4 / 19	4 / 13	3 / 13	4 / 14
Shared bicycle or stand scooter	4 / 14	3 / 12	3 / 10	5 / 17	5 / 18	3 / 8	3 / 12	5 / 21	3 / 9
A company car	5 / 13	5 / 16	3 / 9	5 / 14	5 / 16	4 / 10	4 / 11	5 / 14	4 / 10
Personal Stand scooter	4 / 12	4 / 11	2 / 11	4 / 12	5 / 16	2 / 10	3 / 12	5 / 15	4 / 12

More than 1 hour a day | used

Q2 – On average, on a week-end day (Saturdays or Sundays), how long do you use each one of the following modes of transportation? Base : All

OVERALL, NO MAJOR EVOLUTION IN MODES OF TRANSPORTATION USED EXCEPT A DROP FOR PERSONAL STANDARD BICYCLE

MODES OF TRANSPORTATION USED OVERALL – AT LEAST ONE USE %

Evolutions in points vs 2022

+X/-X

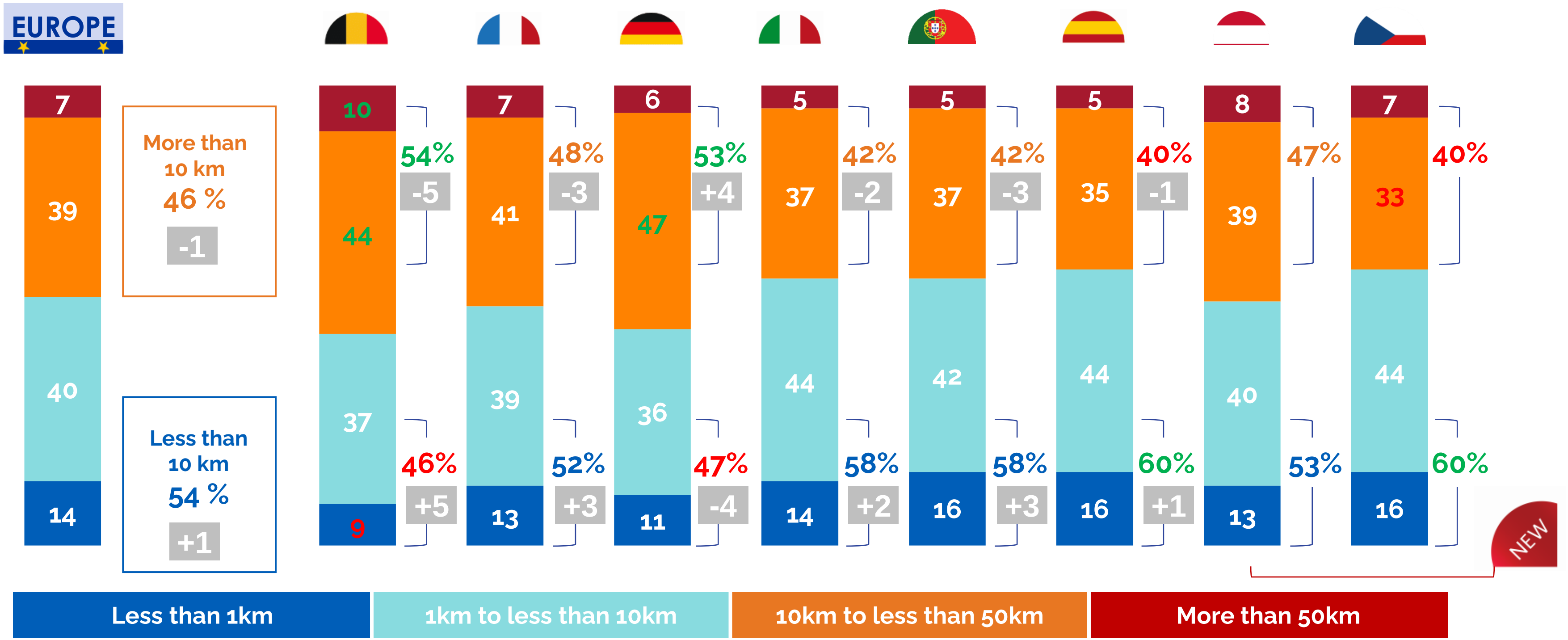
	EUROPE																	
Walking	94	-1	89	-1	89	-4	96	+1	94	-2	94	-2	98	=	98	-	98	-
A personal car	84	+1	82	+2	85	-2	82	+4	94	=	87	-1	86	+1	83	-	76	-
Public transportation	55	=	49	+4	41	-1	61	+5	45	=	44	-6	62	+2	72	-	69	-
Personal standard bicycle	39	-5	39	-2	31	-4	47	+1	48	-2	26	-13	28	-7	52	-	43	-
Car pooling	23	-1	17	+6	17	=	21	+1	18	+4	22	-11	21	-5	27	-	38	-
Taxi / ride-hailing	22	+1	14	+7	13	=	21	=	20	+2	26	-5	30	-1	29	-	21	-
Personal electric bicycle	21	+1	31	+7	17	-1	26	+2	25	+4	12	-5	14	-2	27	-	16	-
A company car	19	=	19	+5	14	=	20	+4	20	+3	21	-6	17	-2	21	-	20	-
Car sharing	19	+1	14	+6	12	+1	15	=	26	+9	26	-10	18	-2	18	-	21	-
Motorbike / two-wheel scooter	18	=	16	+6	14	=	18	=	27	+3	16	-4	18	-4	22	-	13	-
Shared bicycle or stand scooter	18	-1	14	+6	13	-1	24	-1	23	=	13	-7	15	-3	30	-	13	-
Personal Stand scooter	15	=	13	+6	13	=	14	=	18	+2	12	-3	14	-3	18	-	14	-

Q1 – On average, on a normal weekday (Mondays to Fridays), how long do you use each one of the following modes of transportation each day? / Q2 – On average, on a week-end day (Saturdays or Sundays), how long do you use each one of the following modes of transportation?
Base : All

XX significantly superior to European average / to 2022
XX significantly inferior to European average / to 2022

DISTANCE OF COMMUTING STAYS STABLE OVERALL

DISTANCE HOME > PLACE OF WORK OR STUDIES



Q7 – What is the average distance you travel to go from home to place of work / place of studies most of the time?
Base : Employed or students

XX significantly superior to European average
XX significantly inferior to European average

MOBILITY REPRESENTS A SIGNIFICANT BUDGET ACROSS EUROPE.
STABLE IN MOST COUNTRIES EXCEPT IN BELGIUM AND PORTUGAL.

MONTHLY MOBILITY BUDGET (EXCLUDING INSURANCE) **€**

EUROPE

147 €
+8€ vs 2022
More than 200€ :
13 % +1

XX significantly superior to European average
XX significantly inferior to European average

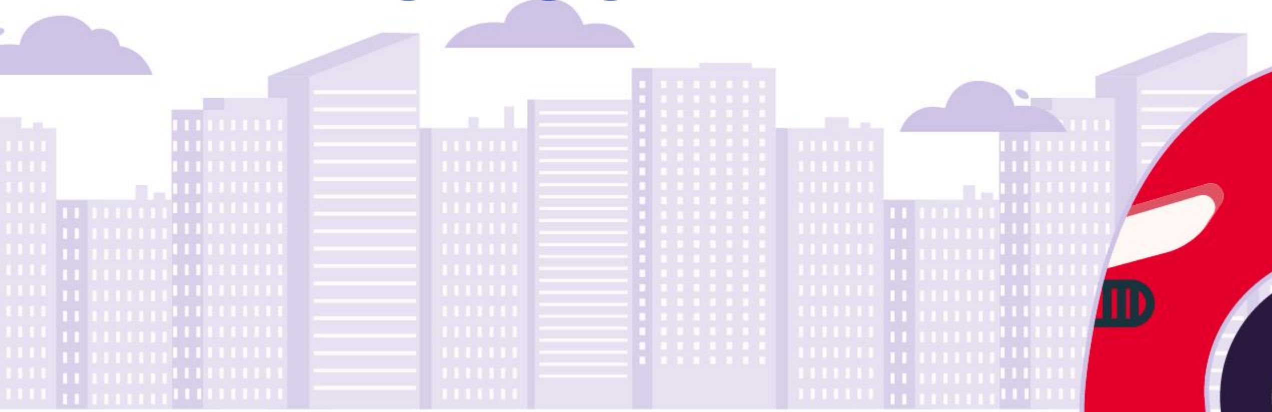
Country	Budget	vs 2022	More than 200€	Change
Belgium	194 €	+73€ vs 2022	17 %	+4
France	131 €	-15€ vs 2022	13 %	=
Germany	153 €	+17€ vs 2022	15 %	+2
Austria	192 €		19 %	
Italy	138 €	+6€ vs 2022	12 %	+2
Portugal	132 €	-31€ vs 2022	10 %	-5
Spain	108 €	-2€ vs 2022	8 %	=
Czech Republic	125€		14%	

Exchange rate applied : 1 CZK = €0,04

Q6 – What is your individual monthly mobility budget when you take into account travel cards for public transport, car or bike renting, taxi / ride-hailing, expenses for your car (fuel, parking, toll…), fuel, etc. but excluding car insurance if you own a car, and excluding holidays trips ? Base : All

1.2

EVOLUTIONS COMPARED TO 5 YEARS AGO



EUROPEANS SAY THEY HAVE MOSTLY INCREASED THEIR USE OF ELECTRIC BIKES AND WALKING

USE MORE FREQUENTLY THAN 5 YEARS AGO %

	EUROPE								
Personal electric bicycle	**42**	45	51	49	38	25	26	48	35
Walking	**37**	33	40	32	43	37	40	41	33
Public transportation	**33**	33	41	28	35	36	38	32	26
Personal Stand scooter	**29**	23	37	28	35	28	29	20	33
Shared bicycle or stand scooter	**27**	26	29	22	35	30	25	23	26
Personal standard bicycle	**27**	27	34	22	35	33	30	21	20
Motorbike / two-wheel scooter	**27**	31	21	27	28	31	27	19	31
A company car	**27**	30	26	34	29	26	24	19	27
Taxi / ride-hailing	**26**	21	34	27	24	35	21	21	27
Car pooling	**26**	20	39	35	26	28	25	24	18
Car sharing	**24**	17	36	31	26	20	25	25	20
A personal car	**22**	19	17	19	25	26	22	20	28

Q3 – Compared to 5 years ago, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation? – *The question has been changed vs 2022 "Compared to before Covid, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation?"*

XX significantly superior to European average / to 2022
XX significantly inferior to European average / to 2022

…WHEREAS MODES INVOLVING CAR SHARING WITH OTHERS DECLINE

USE LESS FREQUENTLY THAN 5 YEARS AGO %

	EUROPE								
Personal electric bicycle	**17**	11	16	13	18	28	19	19	27
Walking	**14**	16	11	13	13	19	11	12	16
Public transportation	**22**	23	15	22	21	25	20	20	25
Personal Stand scooter	**25**	26	23	19	20	38	20	33	25
Shared bicycle or stand scooter	**27**	27	29	23	24	33	29	26	34
Personal standard bicycle	**25**	26	21	27	21	25	23	26	32
Motorbike / two-wheel scooter	**25**	23	28	22	18	34	21	32	27
A company car	**23**	25	26	18	22	25	21	30	19
Taxi / ride-hailing	**31**	28	30	25	26	31	31	36	35
Car pooling	**29**	27	25	22	30	37	23	32	30
Car sharing	**30**	33	20	20	23	41	28	33	34
A personal car	**26**	28	32	23	27	24	29	27	19

Q3 – Compared to 5 years ago, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation? - The question has been changed vs 2022 "Compared to before Covid, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation?"
Base : Modes of transportation users

X significantly superior to European average / to 2022
X significantly inferior to European average / to 2022

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FINALLY, PERSONAL ELECTRIC BICYCLE, WALKING AND PUBLIC TRANSPORTATION SHOW THE MOST POSITIVE DELTA OF USE

DELTA USE (MORE – LESS) %

	EUROPE								
Personal electric bicycle	**+25**	+34	+35	+36	+20	-3	+7	+29	+8
Walking	**+23**	+17	+29	+19	+30	+18	+29	+29	+17
Public transportation	**+11**	+10	+26	+6	+14	+11	+18	+12	+1
Personal Stand scooter	**+4**	-3	+14	+9	+15	-10	+9	-13	+8
Shared bicycle or stand scooter	**=**	-1	=	-1	+11	-3	-4	-3	-8
Personal standard bicycle	**+2**	+1	+13	-5	+14	+8	+7	-5	-12
Motorbike / two-wheel scooter	**+2**	+8	-7	+5	+10	-3	+6	-13	+4
A company car	**+4**	+5	=	+16	+7	+1	+3	-11	+8
Taxi / ride-hailing	**-5**	-7	+4	+2	-2	+4	-10	-15	-8
Car pooling	**-3**	-7	+14	+13	-4	-9	+2	-8	-12
Car sharing	**-6**	-16	+16	+11	+3	-21	-3	-8	-14
A personal car	**-4**	-9	-15	-4	-2	+2	-7	-7	+9

Q3 – Compared to 5 years ago, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation? - The question has been changed vs 2022 "Compared to before Covid, would you say that overall, you use more frequently, equally or less frequently each of the following mode of transportation?" Base : Modes of transportation users

CHANGES IN MOBILITY HABITS ARE MAINLY DRIVEN BY ECONOMIC AND ENVIRONMENTAL REASONS, PARTICULARLY IN FRANCE AND GERMANY

MOBILITY HABITS EVOLUTION REASONS %

	EUROPE								
NET Professional reason	28	26	21	28	25	36	30	27	34
NET Personal reason	42	41	40	42	38	41	42	45	49
I am concerned about cost of transports	35	32	46	39	33	36	35	35	25
My family / personal situation evolved	29	28	23	29	27	24	30	33	35
I am concerned about environmental impact of transports	24	24	30	26	25	24	30	27	9
I moved to another place of residence	20	19	22	20	14	23	17	20	21
I have more flexibility on ways of working	16	14	11	15	16	20	18	15	16
I started a new job	16	13	10	17	11	20	16	15	21
It was imposed by local government *	16	22	18	18	13	16	12	16	16
Due to the financial support from the government *	3	4	3	4	4	3	3	2	3
Other, specify	6	4	5	7	5	4	13	5	4

Q4 – You said that you have changed your mobility habits compared to 5 years ago. Among the following reasons below, what are the main ones explaining this evolution ?
The question has been changed vs 2022 "You said that you have changed your mobility habits compared to last year" Base : Have changed their mobility habits

* new items in 2023

XX significantly superior to European average
XX significantly inferior to European average

1.3
FUTURE INTENTIONS

A VERY POSITIVE DELTA FOR WALKING, BICYCLES (ELECTRIC AND STANDARD) AND FOR PUBLIC TRANSPORTATION

DELTA INTENTION OF USE (MORE – LESS) %

	EUROPE								
Walking	**+25**	+20	+26	+17	+31	+26	+27	+30	+21
Personal electric bicycle	**+15**	+18	+26	+21	+22	-6	-4	+15	+2
Public transportation	**+12**	+10	+16	+7	+12	+13	+17	+13	+4
Personal standard bicycle	**+7**	+1	+9	+6	+22	+11	+4	+5	+3
Personal Stand scooter	**+2**	-6	+10	+18	+9	-8	+1	-10	-1
A personal car	**-1**	-2	-8	=	-4	+1	-4	-2	+9
Motorbike / two-wheel scooter	**-1**	-2	-2	+1	+7	-2	-2	-2	-3
A company car	**-5**	-1	-5	+5	-10	+2	-7	-18	-7
Car sharing	**-5**	-17	+9	+12	-1	-7	-3	-11	-18
Car pooling	**-5**	-9	=	+4	-2	-4	-3	-5	-11
Shared bicycle or stand scooter	**-6**	-1	-2	-1	+6	-18	-12	-9	-19
Taxi / ride-hailing	**-13**	-10	-8	-11	+3	-20	-10	-17	-23

Q5 – In the next 12 months, would you say that you intend to use the following modes of transportation more / equally / less frequently than today? Base : Modes of transportation users

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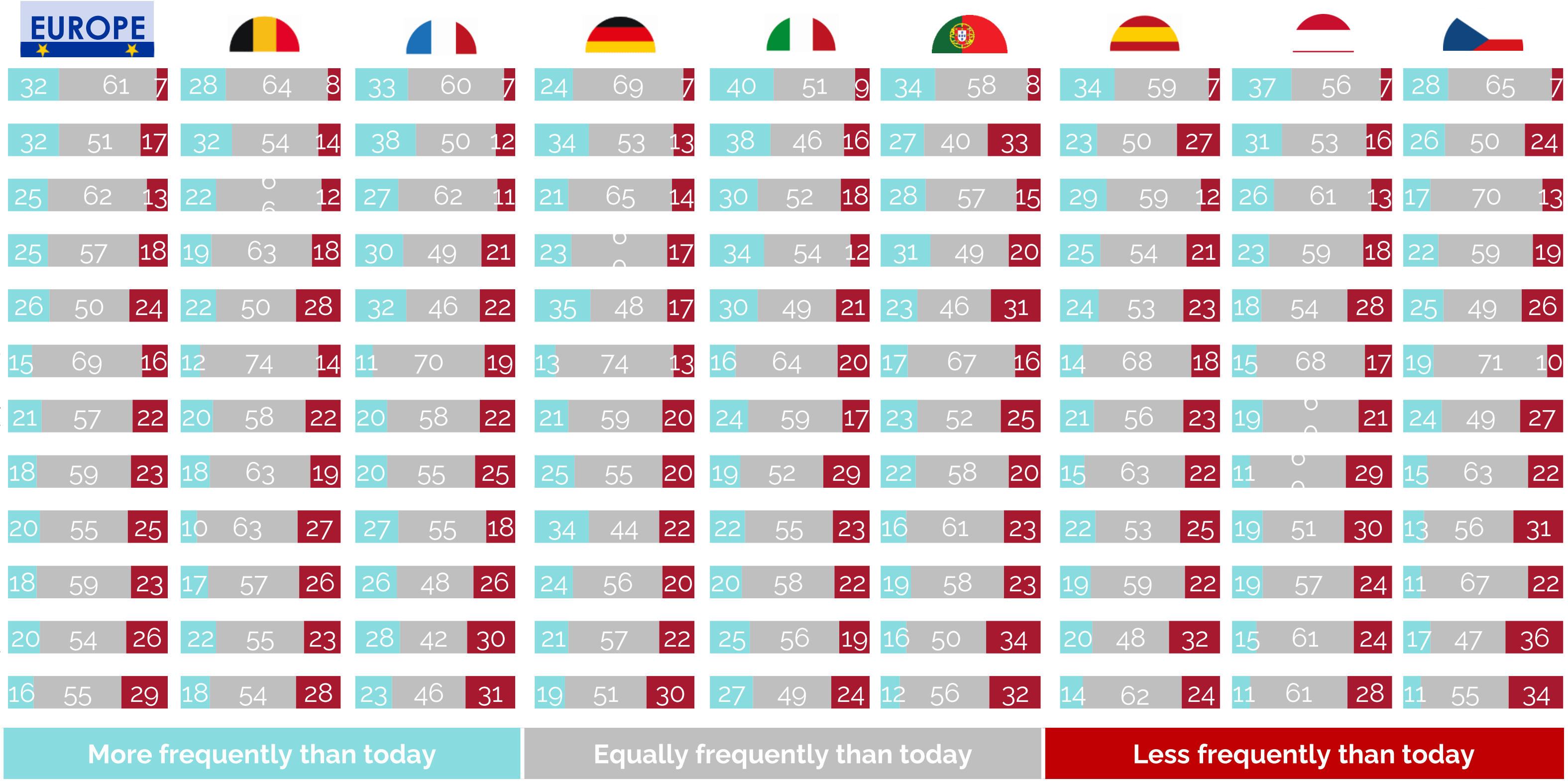
WALKING IS THE MODE OF TRANSPORT THAT WILL MAKE THE MOST PROGRESS IN THE FUTURE

INTENTION OF USE - %



Q5 – In the next 12 months, would you say that you intend to use the following modes of transportation more / equally / less frequently than today? Base : Users

EUROPEANS INTEND TO WALK MORE, BUT ALSO TO USE MORE PERSONAL ELECTRIC BICYCLE AND PUBLIC TRANSPORTATION

INTENTION TO USE MORE FREQUENTLY THAN TODAY %

	EUROPE																	
Walking	**32**	+2	28	+5	33	+5	24	+3	40	+1	34	-5	33	+3	36	-	27	-
Personal electric bicycle	**32**	+5	32	+8	38	+4	34	+7	38	+6	27	=	20	+6	21	-	13	-
Public transportation	**25**	+4	22	+4	27	+3	21	+5	30	+2	28	+2	12	-1	13	-	16	-
Personal standard bicycle	**25**	=	19	-2	30	+2	23	+5	34	=	31	-5	9	-1	14	-	11	-
Personal Stand scooter	**26**	+4	22	+7	32	+2	35	+12	30	+2	23	-2	4	-1	10	-	6	-
A personal car	**15**	+1	12	+6	11	+1	13	+2	16	+2	17	-3	4	=	4	-	4	-
Motorbike / two-wheel scooter	**21**	=	20	-1	20	-6	21	+4	24	+4	23	-8	4	+1	5	-	3	-
A company car	**18**	+1	18	+5	20	-1	25	+3	19	-4	22	=	5	=	5	-	5	-
Car sharing	**20**	+2	10	-8	27	+6	34	+16	22	=	16	-4	5	=	5	-	3	-
Car pooling	**18**	+3	17	-6	26	+5	24	+8	20	+7	19	=	5	-1	6	-	5	-
Shared bicycle or stand scooter	**20**	+2	22	+3	28	+2	21	+6	25	+2	16	-9	3	-1	3	-	4	-
Taxi / ride-hailing	**16**	+2	18	-1	23	-3	19	+3	27	+7	12	-5	5	+1	4	-	3	-

NEW

Q5 – In the next 12 months, would you say that you intend to use the following modes of transportation more / equally / less frequently than today? Base : Users

XX significantly superior to European average
XX significantly inferior to European average

AN ANTICIPATED DECREASE IN FREQUENCY OF USE MAINLY FOR PERSONAL STANDARD BICYCLE

INTENTION TO USE LESS FREQUENTLY THAN TODAY %

	EUROPE																	
Walking	**7**	+2	8	+3	7	+1	7	+1	9	+2	8	=	7	+2	17	-	10	-
Personal electric bicycle	**17**	=	14	+6	12	-3	13	+2	16	-3	33	+4	27	+5	29	-	22	-
Public transportation	**13**	-3	12	-2	11	-3	14	-3	18	+1	15	-6	12	-2	13	-	13	-
Personal standard bicycle	**18**	+6	18	+9	21	+12	17	+2	12	-1	20	+9	21	+8	30	-	31	-
Personal Stand scooter	**24**	=	28	+6	22	+3	17	-3	21	-3	31	+3	23	-1	24	-	22	-
A personal car	**16**	+2	14	-2	19	+4	13	-1	20	+3	16	+2	18	+5	28	-	34	-
Motorbike / two-wheel scooter	**22**	+3	22	-2	22	+9	20	+3	17	=	25	+3	23	+4	21	-	27	-
A company car	**23**	+2	19	-4	25	+3	20	-3	29	+9	20	+2	22	+1	18	-	19	-
Car sharing	**25**	-2	27	+7	18	-8	22	-3	23	-6	23	-1	25	+1	16	-	24	-
Car pooling	**23**	=	26	+11	26	+5	20	-1	22	-9	23	-2	22	+1	28	-	26	-
Shared bicycle or stand scooter	**26**	=	23	-3	30	+6	22	+1	19	-8	34	+2	32	+9	24	-	36	-
Taxi / ride-hailing	**29**	+2	28	+2	31	+12	30	+4	24	-7	32	+5	24	+1	7	-	7	-

NEW

Q5 – In the next 12 months, would you say that you intend to use the following modes of transportation more / equally / less frequently than today? Base : Users

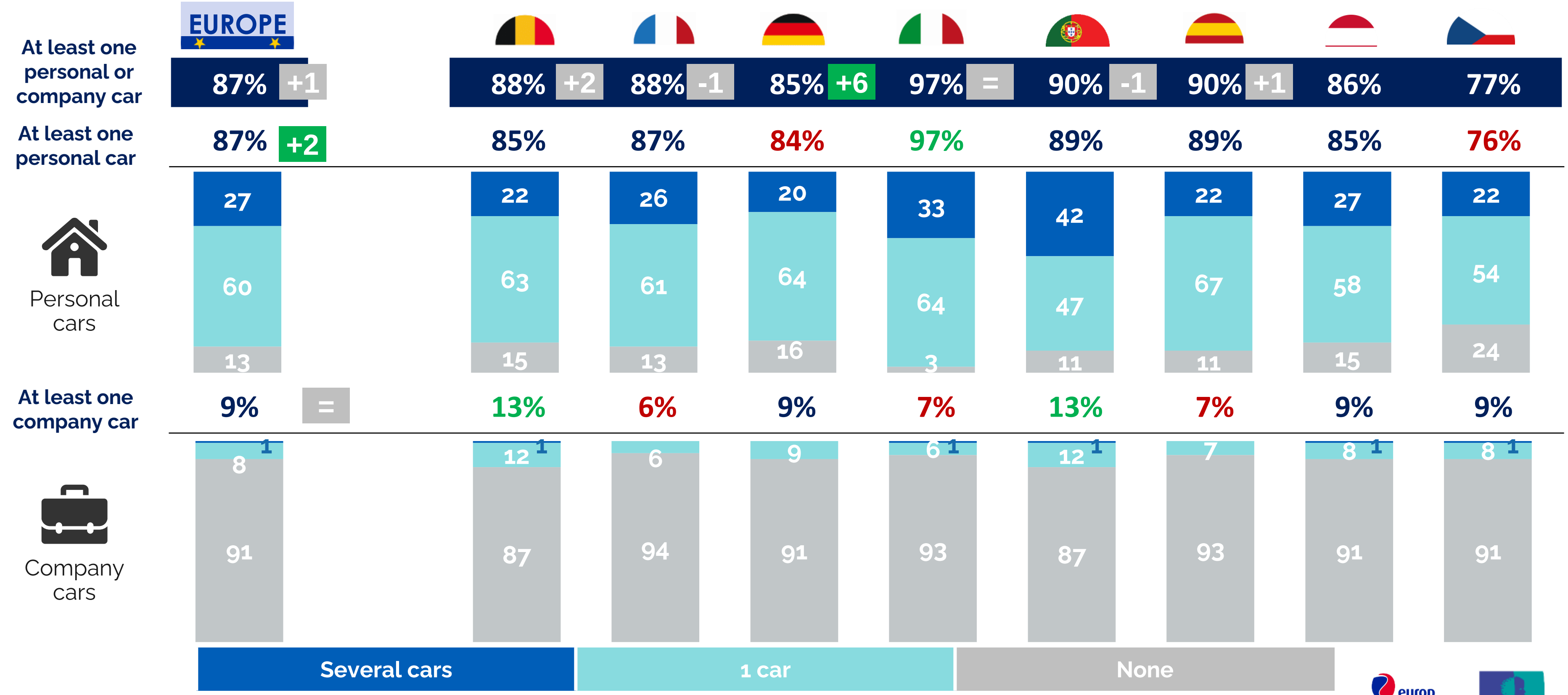
XX significantly superior to European average
XX significantly inferior to European average

2.

VEHICLES OWNERSHIP AND INTENTIONS

PERSONAL CAR OWNERSHIP STAYS WIDESPREAD IN EUROPE

NUMBER OF CARS OWNED BY THE HOUSEHOLD

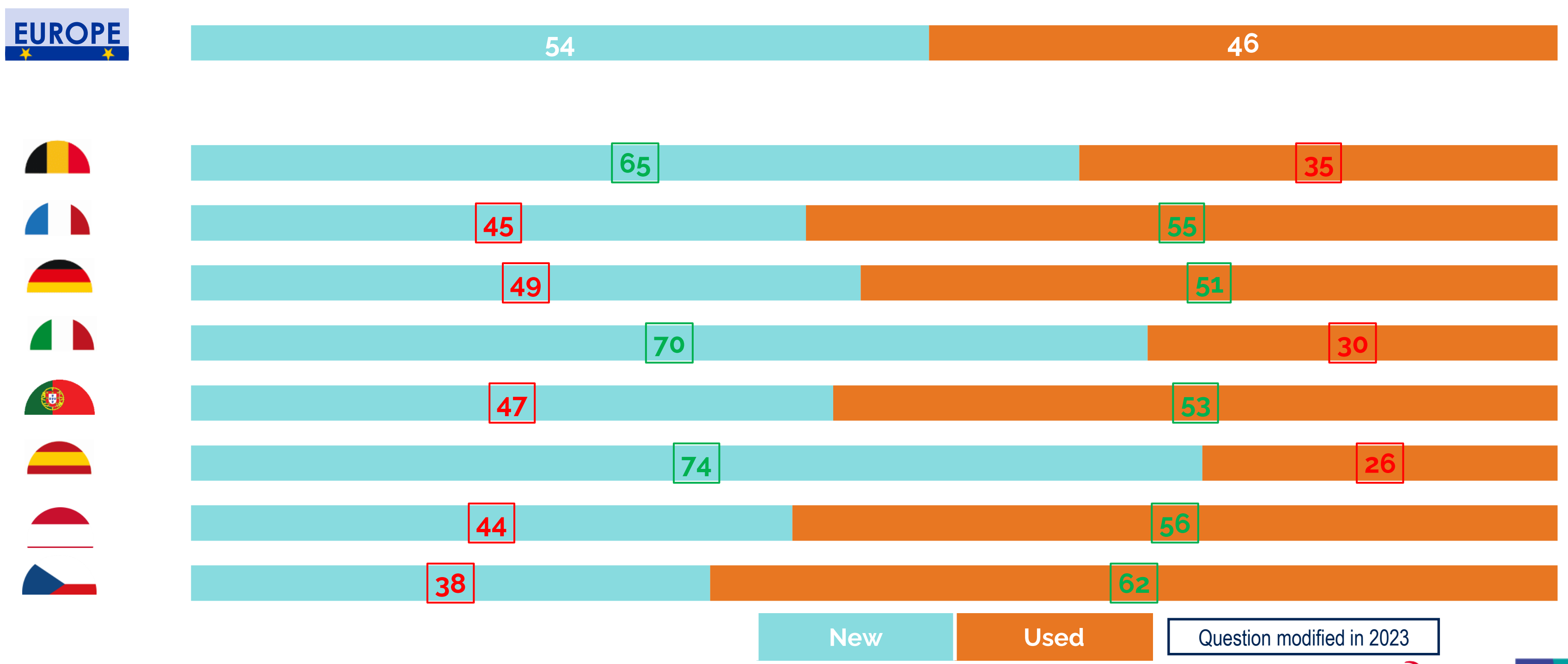


Q11 – How many cars do you own in your household? Base : All

2.1
CAR USED MOST OFTEN

EUROPEANS USE NEW AND OLD CARS IN ALMOST EQUAL PROPORTIONS OVERALL, WITH DIFFERENCES BY COUNTRY (BELGIUM, ITALY AND SPAIN HAVING A MAJORITY OF NEW VEHICLES)

MAIN CAR NEW OR USED %



Q14B – Was this car bought new or used?
Base : Car Owners

XX significantly superior to European average
XX significantly inferior to European average

IF ICE-VEHICLES ARE STILL THE MAJORITY, THEY TEND TO DECLINE. IN THE CZECH REPUBLIC, PETROL IS STRONGLY USED

POWERTRAIN %

ST Thermic: 88%

	EUROPE															
Petrol	49	-2	54	-4	44	-4	67	-1	41	-4	40	+1	43	=	46	60
Diesel	39	-2	31	-3	43	+1	21	0	37	-1	52	0	46	-3	46	34
Hybrid	3	-1	5	-1	4	-1	3	-2	5	=	2	-2	4	-1	2	2
GPL	2	=	1	=	1	=	1	=	10	=	2	=	1	=	0	2
Plug-in Hybrid *	2		2		2		1		2		1		1		1	0
Hybrid Electric Vehicle *	2		3		3		2		2		1		2		0	1
Electric	1	+1	2	+1	2	0	1	-2	2	+1	1	-1	1	=	2	1
Full Electric *	1		2		1		3		1		0		1		2	0
Fuel cell/Hydrogen	-	=	-	=	-	-1	-	-1	-	=	-	=	-	=	-	-
I don't know	1	-1	0	=	0	-1	1	=	0	-1	1	=	1	=	1	0

Q16 - What is the powertrain of this car ? Base : Car owners

XX significantly superior to 2022
XX significantly inferior to 2022

A LARGE MAJORITY OF RESPONDENTS STILL PREFERRED A PURCHASE SOLUTION TO FINANCE THEIR CAR. LEASING IS MORE DEVELOPED IN AUSTRIA.

CAR FINANCING %

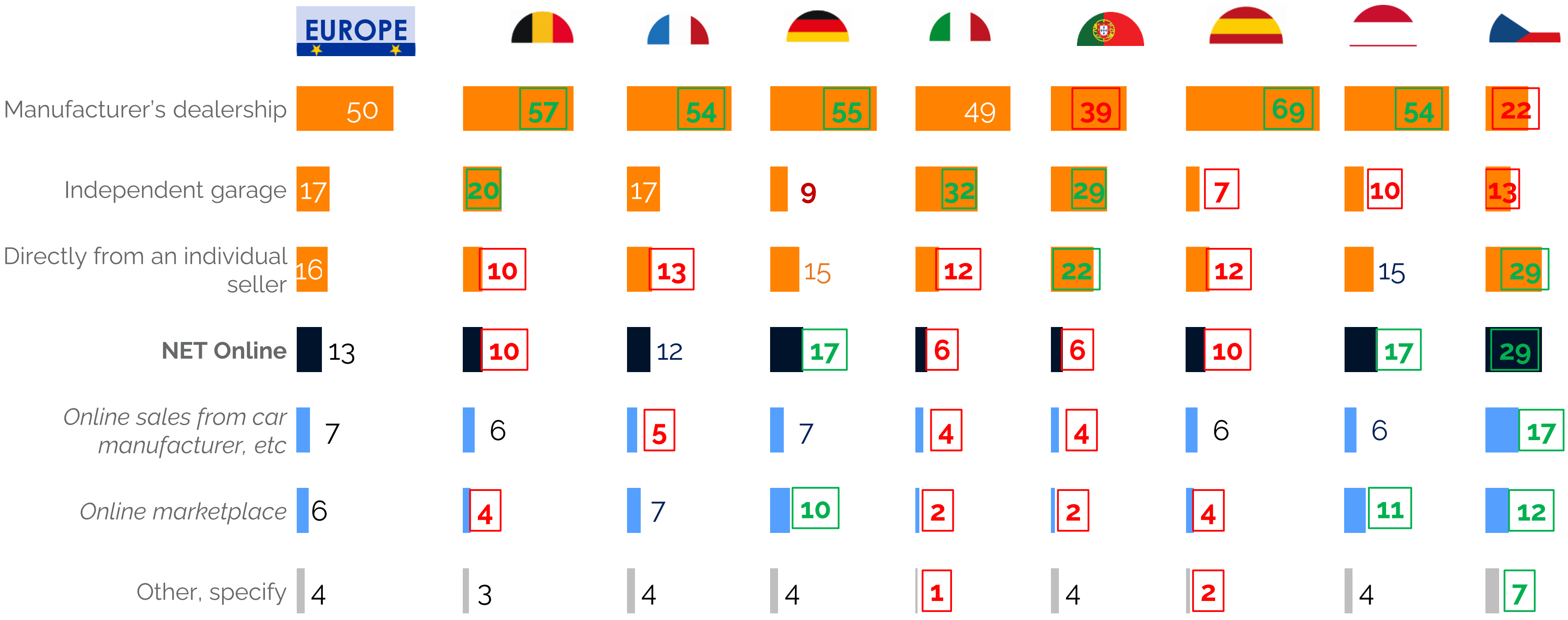
	EUROPE															
NET Purchase	**87**	+1	**86**	-1	**88**	+2	**90**	+2	**90**	+1	**87**	+2	**88**	+1	**79**	**82**
It was bought cash (in one time - without credit)	58	+2	51	-3	61	+2	68	+3	50	+2	56	+1	42	+2	64	68
It was bought partially cash, partially on credit	19	=	22	+3	17	=	16	=	26	=	19	+2	29	-2	10	11
It was bought totally on credit	10	-1	13	-1	10	=	6	-1	14	-1	12	-1	17	+1	5	3
NET Leasing	8	=	7	+2	9	=	7	-1	4	-1	7	-1	7	=	18	7
Leasing with initial down payment	5	=	3	+1	5	=	3	-1	2	-1	5	=	4	=	15	3
Leasing without initial down payment	3	=	4	+1	4	=	4	=	2	=	2	-1	3	=	3	4
It was given for free	1	=	2	=	1	=	0	=	1	1	2	=	1	=	0	3
I do not know	4	-1	5	-1	2	-2	3	-1	5	-1	4	-1	4	-1	3	8

Q19 – How did you acquire this car?
Base : Personal cars owners

XX significantly superior to European average
XX significantly inferior to European average

IN CZECH REPUBLIC, DEALERSHIPS ARE MUCH LESS POPULAR THAN IN OTHER COUNTRIES, WHEREAS INDIVIDUAL SELLERS AND ONLINE SALES ARE MORE SPREAD.

CAR PURCHASE CHANNEL %



Q21 – Where did you acquire this car?
Base : Personal car owners

XX significantly superior to European average
XX significantly inferior to European average

AS LAST YEAR, REPLACEMENT CAR WOULD BE THE STRONGEST ARGUMENT TO CHOOSE A GARAGE/DEALERSHIP FOR REPAIRS AND MAINTENANCE.

REASONS TO CHOOSE WS OR DEALERSHIP

	EUROPE								
Replacement car during repairs / maintenance	31 / 79	27 / 75	35 / 82	27 / 72	29 / 80	28 / 84	36 / 84	37 / 79	29 / 75
Car certification to guarantee the car quality	23 / 73	18 / 67	21 / 69	22 / 65	26 / 78	23 / 83	24 / 79	27 / 77	18 / 61
If this garage is certified by a motor assistance expert	22 / 73	15 / 59	19 / 68	24 / 75	25 / 78	24 / 84	26 / 79	31 / 80	15 / 61
Extension of the duration of your roadside assistance coverage	20 / 67	19 / 66	20 / 65	17 / 51	24 / 75	18 / 76	22 / 76	21 / 62	14 / 62
Pick-up & Delivery	22 / 66	18 / 54	23 / 67	20 / 57	27 / 75	22 / 76	25 / 76	22 / 57	19 / 65

Q24 – If a garage/dealership offered the following services, would you preferably choose it for your car repairs, maintenance and servicing? If it offered…. Base : Car owners

Yes, certainly | % YES

2.2
FUTURE INTENTIONS

IN AUSTRIA AND CZECH REPUBLIC, LOWER INTENTION TO BUY EV CAR

INTENTIONS TO ACQUIRE

	EUROPE								
At least one car	12 / 37	11 / 31	13 / 40	14 / 29	17 / 48	10 / 45	11 / 41	10 / 28	8 / 37
A least one new car	9 / 31	8 / 26	10 / 29	12 / 25	13 / 44	7 / 36	8 / 36	7 / 24	6 / 28
At least one EV	8 / 29	8 / 23	9 / 28	11 / 25	14 / 44	7 / 35	8 / 37	7 / 21	4 / 17
At least one second-hand car	8 / 28	6 / 23	9 / 31	9 / 22	10 / 35	7 / 35	6 / 26	8 / 22	6 / 30
At least one thermic car	8 / 27	8 / 24	10 / 32	9 / 20	8 / 32	7 / 30	6 / 22	7 / 21	7 / 34
At least one electric bicycle	4 / 19	4 / 20	5 / 18	6 / 21	8 / 31	2 / 17	3 / 17	4 / 18	3 / 13

Q25 – In the next 12 months, do you consider…?
Base : All

Yes, certainly | % YES

PURCHASE CHANNELS ARE QUITE STABLE, ONLINE BEING STILL QUITE POPULAR

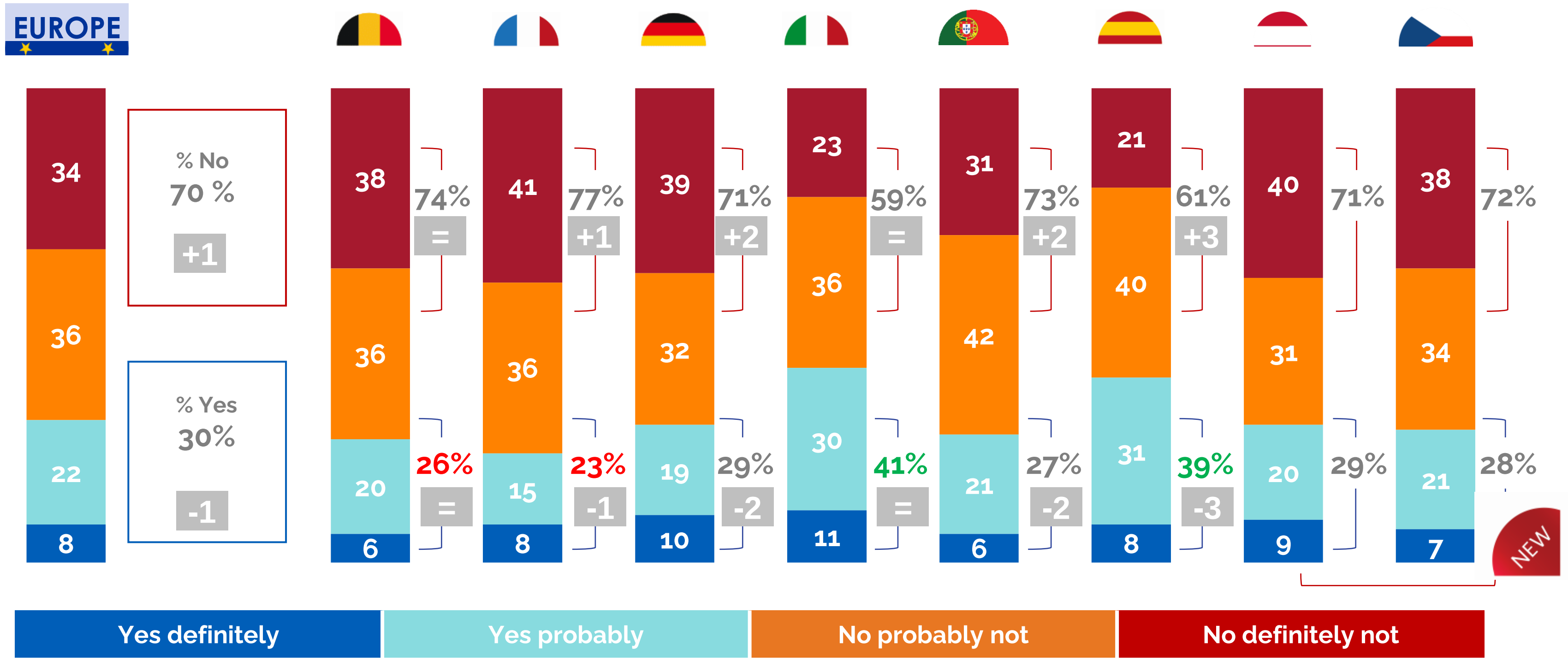
INTENDED PURCHASE CHANNEL %

	EUROPE															
Manufacturer's dealership	42	+3	41	-3	50	+4	42	+3	46	=	42	+6	56	+3	37	17
Independent garage	1	-1	19	+3	1	-3	7	-1	21	-3	22	+3		-1	11	10
NET Online	20	+1	20	+4	19	3	30	+1	14	+2	13	-5	20	+3	25	29
Online sales from car manufacturer / garages / leasing companies	12	+1	12	+5	9	-1	17	+1	9	+1	10	=	13	+2	10	17
Directly from an individual seller (from a classified ad)	12	-1	8	=	8	-6	13	-1	11	+2	12	-5	8	-1	13	21
Online marketplace	8	=	8	-1	10	+4	13	=	5	1	3	-5	7	+1	15	12
I don't know yet	11	-1	11	-4	11	+1	8	-1	8	-1	11	+1	9	-4	13	22
Other	1	-1	1	=	1	+1	0	-1	0	=	0	=	0	=	1	1

Q26 – Where do you intend to acquire this car?
Base : Intend to purchase a car

ITALIANS AND SPANISH ARE MORE OPEN TO GIVING UP THEIR PERSONAL CAR IN THE FUTURE. WHILE THE FRENCH AND BELGIANS ARE MOST ATTACHED TO IT.

INTENT TO STOP HAVING A CAR



Q28 – In the future, could you consider no longer having a personal car?
Base : Car owners

2.3
FOCUS EV

EV INTENDERS

29% in Europe

COUNTRY

BE	FR	DE	IT	PT	ES	AT	CZ
23%	28%	25%	44%	35%	37%	21%	17%

In Belgium, 23% of the population are interested to buy an EV car. Significantly less than the European average of 29%.

GENDER*

	Women	Men
EV intenders	43%	57%
General population	48%	52%

HOUSEHOLD*

With children (under 16y.o.) : 38%
24%

Without children (under 16y.o.) : 62%
76%

AGE*

	<35	35-54	>55
EV intenders	35%	37%	28%
General population	23%	34%	43%

EMPLOYMENT*

	Employed	Unemployed	Inactive
EV intenders	64%	6%	30%
General population	51%	6%	43%

MARKET SIZE*

	Cities	Towns and suburbs	Rural areas
EV intenders	40%	36%	24%
General population	36%	38%	26%

*Based on the 8 countries

Who are they?

- **Rather young men** (57%), **without children** (62%) who **are employed** (64%) and lived in **cities** (40%)
- They have environmental thoughts and more concerns about the ecological situation.

What do they do?

- They use more public transportation, car sharing, Carpooling, Taxi / ride-hailing, Personal standard and electric bicycles and walking.
- They walk today more than 5 years ago (42%)
- They have a mobility budget higher (227€ per month vs 147€)
- They work more often from their home (64% vs 51%)
- They own more bicycles (75% vs 62%)
- They use fewer thermic cars (81% vs 88%)

What do they want?

- They **consider buying or leasing an EV mainly to save money** (43%), and **then for ecological concerns** (39%)
- They intend to acquire this car mainly with a manufacturer's dealership (45% vs 42)
- **They consider not having a personal car in the future** (48% vs 30%)
- They consider acquiring their new EV car by buying it (72%) or also by leasing (56%)
- To buy an EV car, they would like in priority insurance or service that proposes an "*Exhaustive charging stations (public or private) mapping*" (19%) and a "*Roadside assistance specifically adapted to EV*" (18%)

About New Offers?

- They are interested in insurance covering all your travels and mobility situations (75% vs 46%)
- Also interested in the mobility budget offer (71% vs 49%)

To be noted : Those who intend to acquire a new car, tend more to acquire an EV car (77%) than a thermic car (72%)

The comparisons (VS) are with the General population of the 8 countries tested.

THE FIRST REASON TO BUY AN EV IS ECONOMIC, FOLLOWED BY THE ENVIRONMENTAL CONCERN

NEW

REASONS OF CONSIDERING EV %

	EUROPE								
To save money on fuel costs	43	32	46	46	40	58	42	39	34
For ecological concerns	39	30	34	43	40	50	39	37	32
Because you need a new car and petrol/diesel cars will be less popular in the future	34	34	33	36	34	34	38	34	27
Because it will be mandatory in some areas	24	36	28	25	25	15	27	15	19
Because you like a specific model	19	16	24	28	18	15	14	22	26
Other reasons	1	1	2	1	1	1	2	2	3

New question 2023

Q25B. You said you consider buying / leasing an Electric Vehicle / (Plug-in Hybrid...) car, for what reasons? Base : EV intenders

XX significantly superior to European average
XX significantly inferior to European average

PURCHASE COST REMAINS THE MAIN BARRIER TO BUY AN EV, EVEN HIGHER THAN LAST YEAR, WHILE CHARGING POINTS ISSUES SEEM TO DECREASE

BARRIERS TO EV

	EUROPE																
NET Cost	59	+3	61	+4	68	+4	59	+8	57	+3	60	+1	49	+1	55		61
High purchase costs	55	+4	58	+3	65	+4	56	+9	51	+4	53	+2	44	=	53		56
I'm afraid of maintenance costs	19	=	17	+4	17	=	16	+1	21	-2	24	-4	15	-1	15		26
NET Charging points	29	-3	27	-6	29	-7	35	=	31	-1	20	-3	29	-2	32		27
No possibility to install charging points at your home	24	-1	23	-2	22	-3	32	=	22	-1	17	-1	25	=	29		24
No charging points at your office	9	-4	10	-5	14	-5	10	-2	13	-3	6	-3	7	-7	9		6
Not enough public charging points in the places where I go *	11		13		13		13		7		6		8		13		14
Difficulty to make long-distance trips	30	=	29	-2	39	-1	27	+1	29	+4	26	+1	29	-1	30		27
I don't need a new car at the moment	49	-3	52	-4	42	+3	53	-5	43	-3	49	-1	52	-1	56		47
Other	27	+18	24	+13	28	+17	34	+21	23	+19	16	+11	34	+25	27		26

Q29 – What are the main reasons why you don't consider buying an Electric Vehicle ?
Base : Non considers of EV

* *new item 2023*

XX significantly superior to 2022
XX significantly inferior to 2022

europ assistance you live we care

Ipsos

CHARGING STATIONS MAPPING, WALLBOX AT-HOME ASSISTANCE AND EV ROADSIDE ASSISTANCE ARE THE FIRST SERVICES THAT COULD SUPPORT THE MOST EV USAGE.

TOP 3 ADDITIONAL SERVICES EV - % TOTAL MENTIONS

	EUROPE								
#1	Charging stations mapping 59%	Charging stations mapping 56%	Wallbox at home assistance 63%	Charging stations mapping 66%	EV Roadside assistance 63%	EV Roadside assistance 61%	EV Roadside assistance 64%	Charging stations mapping 65%	Charging stations mapping 61%
#2	EV Roadside assistance 55%	EV Roadside assistance 56%	EV Roadside assistance 52%	Wallbox at home assistance 60%	Charging stations mapping 59%	Charging stations mapping 55%	Charging stations mapping 62%	Mapping of garages 53%	EV Roadside assistance 52%
#3	Mapping of garages 47%	Mapping of garages 44%	Holiday Swap 48%	Mapping of garages 51%	Mapping of garages 53%	Mapping of garages 47%	Mapping of garages 52%	Wallbox at home assistance 52%	Mapping of garages 51%

Q30 – Among the following services, could any of these insurance and mobility services support your usage of EV or decision to buy one? Base : All

3.
MICRO MOBILITY

LESS EUROPEANS DECLARED OWNING A BICYCLE

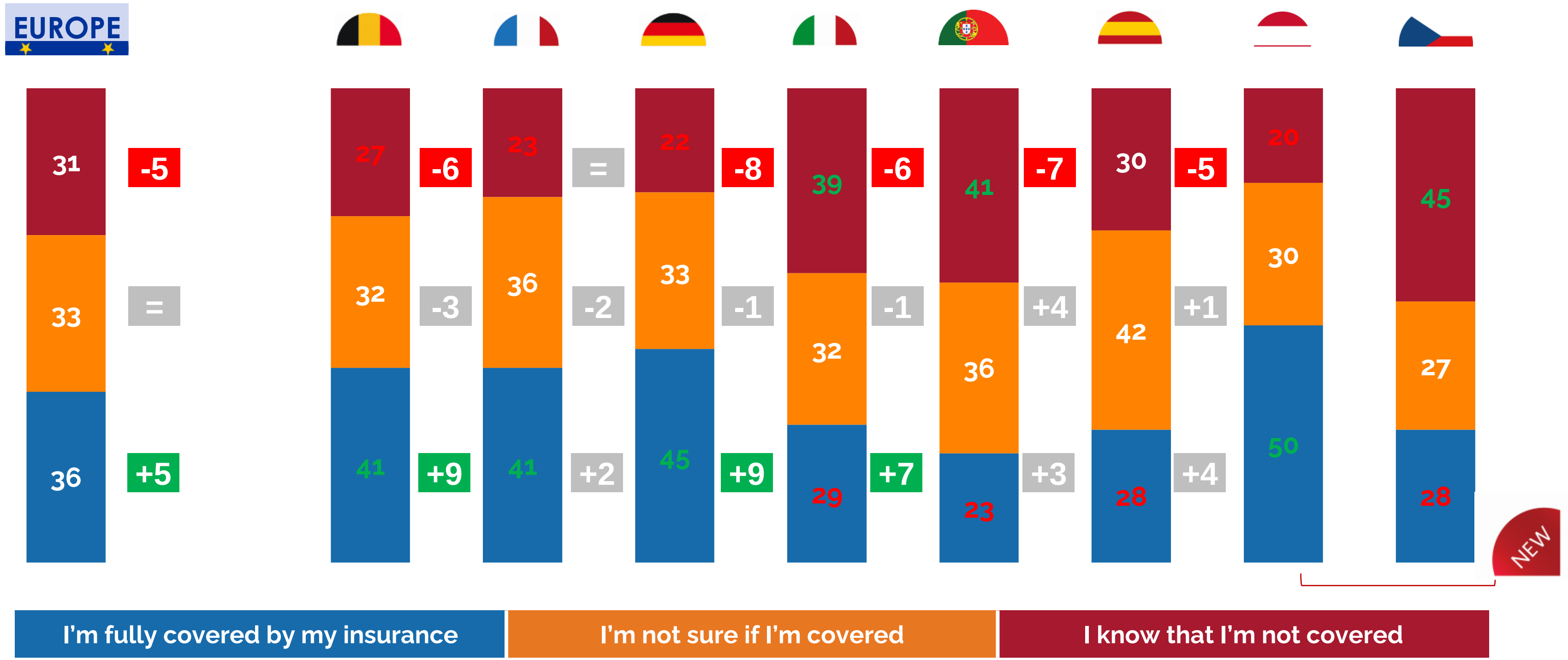
MOTORBIKES / BICYLES OWNED - AT LEAST ONE %

	EUROPE															
At least one	62	-4	72	+1	54	-7	67	+1	66	-1	52	-11	46	-7	70	69
	57	-5	60	-3	50	-7	59	+1	63	-3	51	-10	44	-8	63	66
	19	+2	36	+7	16	-1	25	+1	20	+6	10	-5	11	+1	24	14
At least one	18	-1	17	+6	18	-3	13	+2	16	-1	15	-6	16	-7	21	26
	14	-2	14	+5	13	-5	10	+1	13	=	13	-4	11	-8	17	23
	11	=	11	+4	11	=	10	+2	13	+1	9	-3	12	-3	12	11
At least one	14	+1	12	+6	10	+1	14	+2	24	+2	11	-4	12	-3	16	9
	12	+1	10	+5	9	+2	13	+4	21	=	10	-3	10	-3	13	8
	7	+1	8	+5	6	+1	8	=	10	+3	6	-2	6	-1	8	4
	14	-1	13	+5	10	-2	14	+2	18	+1	13	-6	16	-3	16	14

Q13 – Do you own in your household one or several….
Base : All

ONE-THIRD OF USERS ASSERT THEY HAVE FULL COVERAGE FOR THEIR BICYCLE OR SCOOTER (MUCH HIGHER IN AUSTRIA), A RATE RISING THIS YEAR IN SEVERAL COUNTRIES.

MICRO MOBILITY COVERAGE



Q38 – Regarding the coverage you have if you encounter a problem or accident while using a bicycle / scooter, which sentence corresponds to your situation? Base : Micro-mobility or bicycles users

MORE THAN A HALF OF BIKE OWNERS WOULD CONSIDER AN INSURANCE OR ASSISTANCE, MAINLY TO BE ASSISTED IN CASE OF ACCIDENT.

BICYCLE ASSISTANCE INTEREST %

	EUROPE								
At least one contract	**57**	**54**	**48**	**58**	**66**	**61**	**65**	**58**	**48**
An assistance	9	12	7	7	11	8	13	7	5
An insurance	27	22	21	33	26	29	24	34	24
Both	21	20	20	18	29	24	28	17	19
None	43	46	52	42	34	39	35	42	52

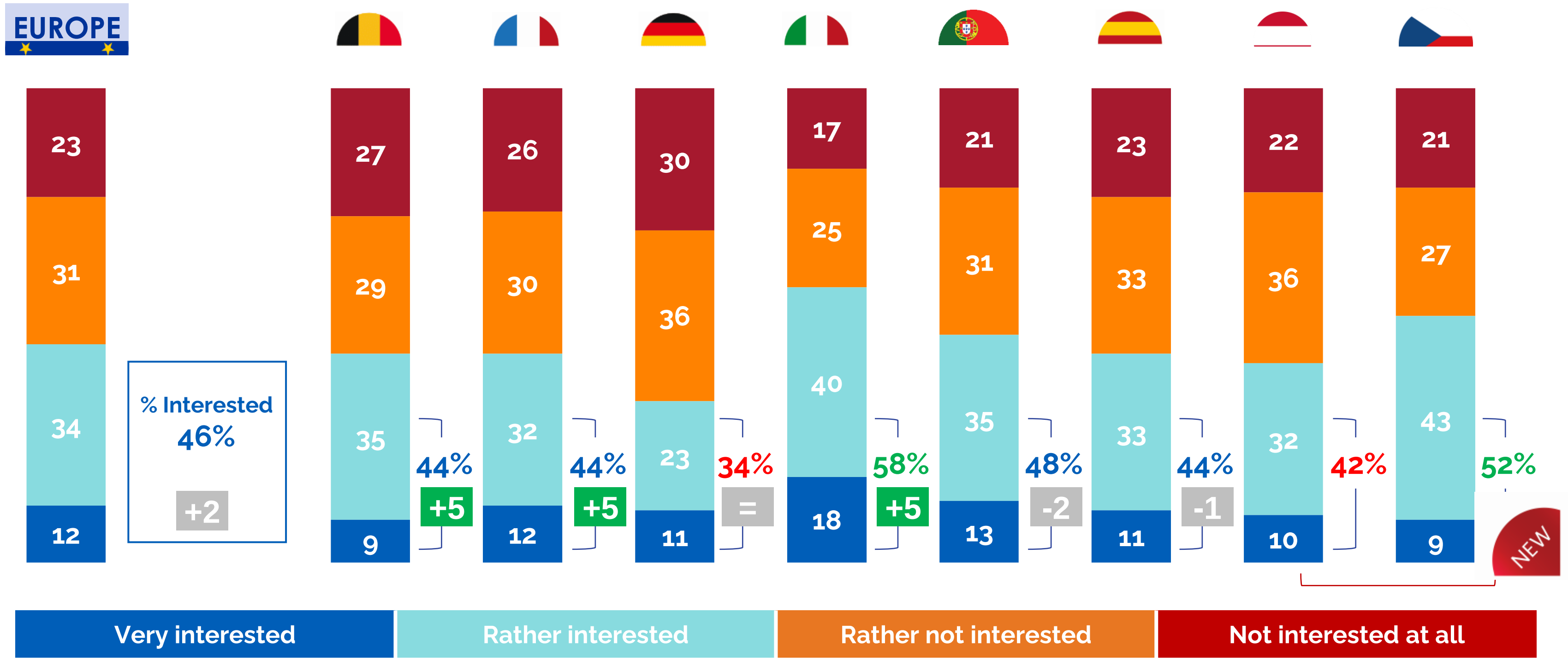
REASONS FOR INTEREST %

	EUROPE								
You want to be assisted in case of accident/breakdown	32	34	21	26	35	40	39	33	26
The price of your bicycle	27	24	32	32	25	22	21	25	35
The fact that it's a new one	20	20	20	22	21	17	21	23	15
You want a cover to restore your mobility if interrupted	20	20	25	19	18	21	19	18	23
Other	1	2	2	1	1	0	0	1	1

Q39 – When buying a new bicycle, would you consider subscribing a bicycle assistance (help in case of breakdown/accident) / insurance (financial compensation in case of damage/theft)? / Q40 - What factors would encourage you to subscribe a bicycle assistance/insurance?
Base : Bicycle owners / Interested

A HIGHER INTEREST THIS YEAR IN BELGIUM, FRANCE AND ITALY FOR PERSON-BASED INSURANCE

INTEREST IN A PERSON-BASED INSURANCE



Q41 – Would you be interested by a person-based insurance, covering all your travels and mobility situations, including those by car, bicycle and other micro-mobility whether personal or shared (versus a vehicle-based insurance)? Base : All

XX significantly superior to European average
XX significantly inferior to European average

4.

CAR INSURANCE & ASSOCIATED SERVICES

AN INCREASE IN THE INSURANCE BUDGET FOR SEVERAL COUNTRIES, ESPECIALLY IN GERMANY

YEARLY BUDGET CAR INSURANCE – AVERAGE

EUROPE

616 € per year

+49€ vs 2022

761 € per year

+26€ vs 2022

547 € per year

-24€ vs 2022

715 € per year

+102€ vs 2022

1052 € per year

577 € per year

+2€ vs 2022

415 € per year

+47€ vs 2022

580 € per year

+90€ vs 2022

257€ per year

XX significantly superior to European average
XX significantly inferior to European average

Exchange rate applied : 1 CZK = €0,04

Q22 – What is your individual car insurance budget? You can answer per year.
Base : Car owners

ROADSIDE ASSISTANCE IS PARTICULARLY IMPORTANT WHEN ACQUIRING A CAR, AS WELL AS ACCESS TO A REPLACEMENT CAR IN CASE OF PROBLEM

IMPORTANCE OF SERVICES IN CAR ACQUISITION – TOTAL IMPORTANT %

* new item 2023

	EUROPE								
Roadside assistance to your vehicle	**87**	86	89	83	87	93	89	85	86
Replacement car in case of breakdown, theft, accident	**84**	84	89	76	85	90	85	79	81
Stolen vehicle tracking	**78**	73	77	70	86	88	82	75	70
Steering to a preferred / agreed network of workshop for repairs	**77**	66	76	75	76	89	83	80	71
Mobility services for you and your passengers if your vehicle is immobilized	**75**	71	81	65	76	86	84	66	71
Tyre protection	**74**	73	73	65	76	83	84	69	67
Breakdown / emergency call	**71**	65	71	58	81	82	79	61	66
Car Pick-up & Delivery for maintenance / servicing	**65**	54	72	53	71	80	73	51	64
Assistance and services covering your other means of transports, meaning your micro-mobility devices *	**49**	47	50	38	58	55	58	41	45

Q45 – How important are the assistance & mobility services below when you consider acquiring a car, whether self-financed, by credit, or leasing? Base : Car Owners

XX significantly superior to European average
XX significantly inferior to European average

ALMOST THE SAME EXACT HIERARCHY OF SERVICES WHEN CHOSING A CAR INSURANCE

IMPORTANCE OF SERVICES IN CAR INSURANCE – TOTAL IMPORTANT %

* *new item 2023*

	EUROPE								
Roadside assistance to your vehicle	**86**	84	91	77	87	93	91	80	83
Replacement car in case of breakdown, theft, accident	**83**	85	88	74	83	91	85	75	80
Mobility services for you and your passengers if your vehicle is immobilized	**75**	71	81	61	76	89	86	64	69
Stolen vehicle tracking	**75**	70	75	66	83	86	81	70	69
Tyre protection	**71**	67	69	59	74	83	82	65	64
Steering to a preferred / agreed network of workshop for repairs	**71**	67	78	56	71	86	81	60	72
Breakdown / emergency call	**69**	64	68	57	80	79	78	59	64
Car Pick-up & Delivery for maintenance / servicing	**66**	57	73	54	70	82	74	53	63
Assistance and services covering your other means of transports, meaning your micro-mobility devices *	**51**	47	53	40	60	57	60	38	46

Q46 – How important are the assistance & mobility services below when you consider choosing your motor insurance? Base : Car Owners

XX significantly superior to European average
XX significantly inferior to European average

europ assistance *you live we care*

Ipsos

OVERALL, A VERY STRONG INTEREST FOR ROADSIDE ASSISTANCE

RECAP - IMPORTANCE OF SERVICES – TOTAL IMPORTANT %

	EUROPE								
IN CAR ACQUISITION									
#1	Roadside Assistance 87% +2	Roadside Assistance 86% +1	Roadside Assistance 89% +3	Roadside Assistance 83% +5	Roadside Assistance 87% =	Roadside Assistance 93% +4	Roadside Assistance 89% -3	Roadside Assistance 85%	Roadside Assistance 86%
#2	Replacement car 84% +1	Replacement car 84% =	Replacement car 89% +4	Replacement car 76% +2	Stolen vehicle tracking 86% +5	Replacement car 90% +3	Replacement car 85% -2	Steering to a preferred 80%	Replacement car 81%
#3	Stolen vehicle tracking 78% +2	Stolen vehicle tracking 73% +1	Mobility services 81% +6	Steering to a preferred 75% +34	Replacement car 85% +1	Steering to a preferred 89% +8	Mobility services 84% -4	Replacement car 79%	Mobility services 71%
IN CAR INSURANCE									
#1	Roadside Assistance 86% +2	Replacement car 85% +4	Roadside Assistance 91% +6	Roadside Assistance 77% +5	Roadside Assistance 87% +1	Roadside Assistance 93% +4	Roadside Assistance 91% -1	Roadside Assistance 80%	Roadside Assistance 83%
#2	Replacement car 83% +2	Roadside Assistance 84% +1	Replacement car 88% +3	Replacement car 74% +1	Replacement car 83% +1	Replacement car 91% +3	Mobility services 86% -3	Replacement car 75%	Replacement car 80%
#3	Mobility services 75% +1	Mobility services 71% +3	Mobility services 81% +3	Stolen vehicle tracking 66% +7	Stolen vehicle tracking 83% +3	Mobility services 89% +2	Replacement car 85% -3	Stolen vehicle tracking 70%	Steering to a preferred 72%

Q45 – How important are the assistance & mobility services below when you consider acquiring a car, whether self-financed, by credit, or leasing? / Q46 – How important are the assistance & mobility services below when you consider choosing your motor insurance? Base : Car Owners

CAR DRIVERS ARE WILLING TO PAY AROUND 20% OF THEIR MOTOR INSURANCE TO BE COVERED

NEW

PROPORTION OF MOTOR INSURANCE BUDGET THAT COULD BE DEDICATED TO BE COVERED FOR ASSISTANCE AND MOBILITY SERVICES – AVERAGE

	EUROPE								
Average *(declared proportion in % of insurance budget)*	***20***	***16***	***17***	***17***	***26***	***21***	***24***	***19***	***16***
1 to 4 %	9	10	11	12	5	10	4	12	14
5 %	13	16	16	16	8	11	8	13	15
10 %	24	26	25	25	21	25	22	25	26
15%	6	7	6	6	6	7	6	5	5
20%	14	12	12	9	20	15	19	14	11
30%	7	3	5	4	10	6	9	6	8
31 to 50 %	9	9	7	13	8	9	11	7	7

6% of respondents said 0%
7% said more than 50%

Q46B - Which overall proportion in % of your motor insurance budget are you willing to dedicate to be covered for these assistance and mobility services?
Base : Car owners

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE. IN PORTUGAL WHATSAPP IS PARTICULARLY POPULAR

NEW

PREFERRED CHANNEL TO CONTACT ASSISTANCE WHEN FACING A FLAT TIRE OR A FLAT BATTERY % - RANKED FIRST+ SECOND

	EUROPE								
Talking to a human operator via phone call	**83**	85	89	84	84	61	88	87	83
Digitally as a self-service through WhatsApp	**41**	37	31	36	50	48	51	40	36
Digitally as a self-service through an app or webapp	**40**	40	44	36	39	48	37	34	44
Talking to virtual agent: a voice bot via phone call	**36**	38	35	44	27	44	25	39	38

Q48B - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

New question 2023

XX significantly superior to European average
XX significantly inferior to European average

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE. IN PORTUGAL WHATSAPP IS PARTICULARLY POPULAR

NEW

PREFERRED CHANNEL TO CONTACT ASSISTANCE WHEN FACING AN ACCIDENT % - RANKED FIRST+ SECOND

	EUROPE								
Talking to a human operator via phone call	**84**	85	91	87	84	64	88	88	87
Digitally as a self-service through WhatsApp	**42**	41	33	37	52	46	49	39	35
Digitally as a self-service through an app or webapp	**39**	40	43	32	36	47	38	35	40
Talking to virtual agent: a voice bot via phone call	**36**	34	34	45	28	43	26	39	38

New question 2023

Q48B - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average
XX significantly inferior to European average

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE. IN PORTUGAL WHATSAPP IS PARTICULARLY POPULAR

NEW

PREFERRED CHANNEL TO CONTACT ASSISTANCE WHEN FACING AN ISSUE WITH A CAR WITHIN YOUR OWN COUNTRY % - RANKED FIRST+ SECOND

	EUROPE								
Talking to a human operator via phone call	**84**	88	92	86	86	61	88	88	86
Digitally as a self-service through WhatsApp	**42**	38	33	35	49	47	52	40	36
Digitally as a self-service through an app or webapp	**39**	41	41	36	36	48	36	34	39
Talking to virtual agent: a voice bot via phone call	**35**	34	35	43	29	44	23	38	39

New question 2023

Q48B - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average
XX significantly inferior to European average

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WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE. IN PORTUGAL WHATSAPP IS PARTICULARLY POPULAR

NEW

PREFERRED CHANNEL TO CONTACT ASSISTANCE WHEN FACING AN ISSUE WITH A CAR WHEN ABROAD% - RANKED FIRST+ SECOND

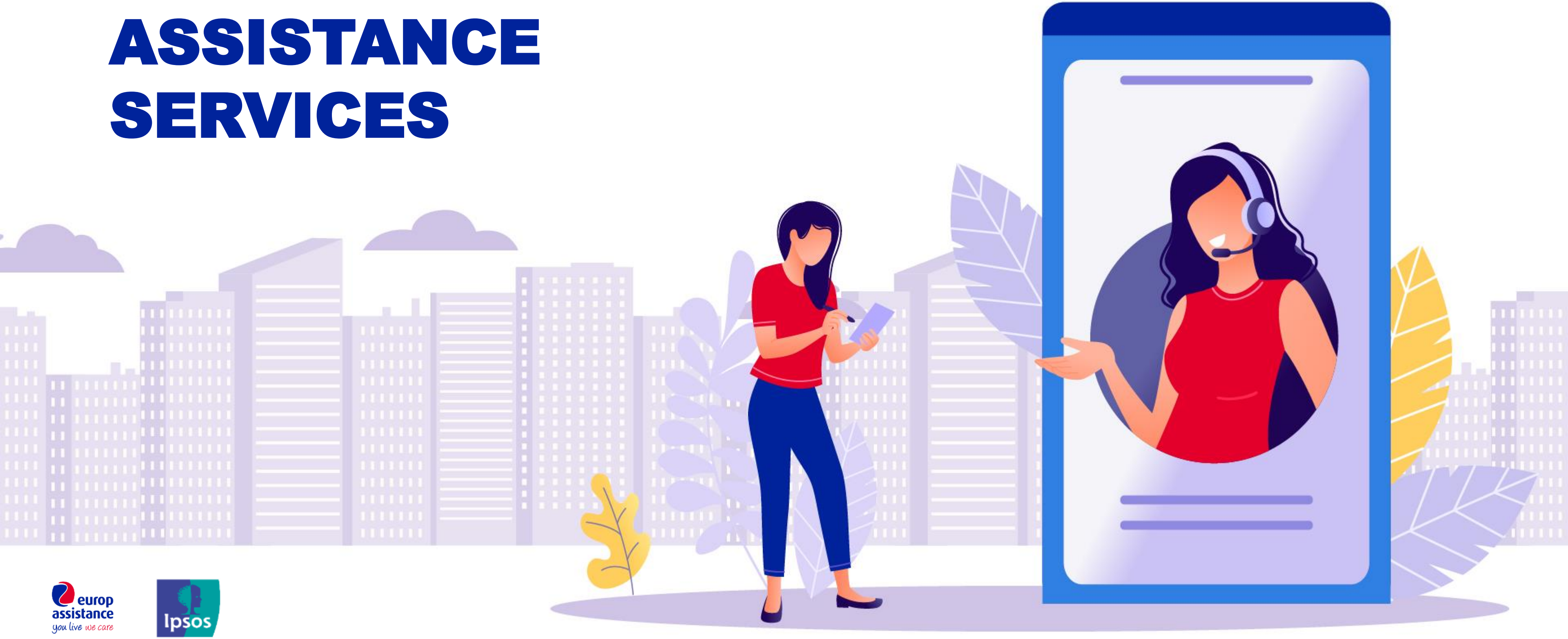
	EUROPE								
Talking to a human operator via phone call	**83**	86	89	85	84	62	86	87	82
Digitally as a self-service through WhatsApp	**42**	39	33	36	50	47	50	38	38
Digitally as a self-service through an app or webapp	**41**	42	43	37	39	46	40	35	44
Talking to virtual agent: a voice bot via phone call	**35**	33	34	42	28	45	24	40	36

New question 2023

Q48B - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average
XX significantly inferior to European average

5.
ASSISTANCE SERVICES



TIME TO ARRIVAL OF THE PATROL/TOWING TRUCK IS THE MOST WANTED SERVICE

NEW

PREFERENCE IN COMMITMENTS OF A ROADSIDE ASSISTANCE SERVICE % - RANKED FIRST

	EUROPE								
Time to arrival of the patrol / towing truck on the spot of the incident *(First + second)*	**31** *(67)*	34	26	36	24	32	35	35	26
Time to pick-up your incoming call	**27** *(47)*	19	38	18	37	34	28	19	19
Ability of the technician to repair the incident on your vehicle directly on the spot of the incident	**26** *(53)*	34	21	34	21	18	22	33	30
Ability to fix your problem with your vehicle over the phone directly	**16** *(33)*	13	15	12	18	16	15	13	25

New question 2023

Q43B - When in need of a roadside assistance service, how would you rank the importance of the following commitments?
Base : Car owners

XX significantly superior to European average
XX significantly inferior to European average

ROADSIDE ASSISTANCE AND REPLACEMENT CAR ARE THE MOST VALUED SERVICES

IMPORTANCE OF ASSISTANCE SERVICES – VERY IMPORTANT %

	EUROPE								
Roadside assistance to your vehicle	**40**	41	47	34	38	38	44	42	32
Replacement car	**38**	38	51	30	36	44	40	34	33
Repair on the spot **	**31**	30	33	26	30	30	36	34	29
Mobility services for you and your passengers if your vehicle is immobilized	**27**	25	34	19	24	34	39	20	17
Over the phone resolution / car problem fixing	**26**	21	28	22	25	27	27	26	28
Access to garages which quality is certified	**26**	24	32	23	25	29	28	29	18
Tyre protection	**23**	22	21	19	24	26	29	24	20
Car Drop-off	**23**	19	29	18	27	28	28	18	15
Hotel accommodation during the repairs of your car*	**21**	16	29	15	25	22	27	19	13
Access to financing solutions for vehicle repairs	**17**	12	20	15	18	20	18	17	18
Possibility to upgrade roadside assistance benefits at your own cost	**15**	13	18	12	16	19	22	14	10

Q49 – How important are the following services from your roadside assistance cover in case of vehicle accident or breakdown with the vehicle you own / use?
Base : Car Owners

** new item 2023 / ** change in item*
XX significantly superior to European average
XX significantly inferior to European average

EXCEPT IN PORTUGAL, ALL THE SERVICES ARE MORE CONSIDERED

IMPORTANCE OF ASSISTANCE SERVICES – VERY IMPORTANT %

	EUROPE								
Roadside assistance to your vehicle	**+2**	+3	+8	+5	+4	-8	-2	-	-
Replacement car	**+1**	+1	+6	+4	+5	-7	-2	-	-
Repair on the spot **	-	-	-	-	-	-	-	-	-
Mobility services for you and your passengers if your vehicle is immobilized	**+1**	+2	+4	+3	+1	-6	=	-	-
Over the phone resolution / car problem fixing	**+3**	+3	+6	+9	+1	-4	=	-	-
Access to garages which quality is certified	**+5**	+7	+8	+7	+6	-1	+1	-	-
Tyre protection	**+2**	+4	+3	+5	+3	-6	-2	-	-
Car Drop-off	**+4**	+8	+7	+6	+6	-4	+1	-	-
Hotel accommodation during the repairs of your car*	-	-	-	-	-	-	-	-	-
Access to financing solutions for vehicle repairs	**+2**	+4	+7	+6	+3	-5	-3	-	
Possibility to upgrade roadside assistance benefits at your own cost	**+1**	+5	+3	+3	+3	-4	-4	-	NEW

Q49 – How important are the following services from your roadside assistance cover in case of vehicle accident or breakdown with the vehicle you own / use?
Base : Car Owners

** new item 2023 / ** change in item*
XX significantly superior to European average
XX significantly inferior to European average

ROADSIDE ASSISTANCE AND REPLACEMENT CAR ARE STILL THE MOST WANTED SERVICES

NEW

WILLINGNESS TO PAY FOR ASSISTANCE SERVICES – TOTAL YES %

	EUROPE								
Roadside assistance to your vehicle	**82**	75	79	78	93	86	86	71	88
Replacement car	**82**	76	78	76	88	88	85	79	87
Mobility services for you and your passengers if your vehicle is immobilized	**77**	70	79	75	80	84	84	65	82
Tyre protection	**79**	76	75	71	83	86	81	76	87
Repair on the spot **	**79**	74	71	75	87	84	82	70	90
Car Drop-off	**75**	68	72	75	83	83	72	67	82
Access to garages which quality is certified	**75**	64	72	68	87	86	75	63	84
Access to financing solutions for vehicle repairs	**73**	63	75	63	77	83	78	64	82
Hotel accommodation during the repairs of your car*	**73**	67	67	58	80	83	75	66	86
Possibility to upgrade roadside assistance benefits at your own cost	**73**	68	65	66	70	83	69	73	88
Over the phone resolution / car problem fixing	**64**	51	58	63	71	78	60	59	73

Q49B - You just said that some services from your roadside assistance cover in case of vehicle accident or breakdown were very important to you. If these each one of the services below were to be proposed as options on top of a standard roadside assistance cover, would you be willing to pay an additional fee for it ?
Base : Car owners who find at least one of the services very important

New question 2023

THE ACCEPTABLE PRICE FOR THESE SERVICES IS BETWEEN 100 AND 200 EUROS ON AVERAGE ACROSS EUROPE

NEW

ACCEPTABLE COST FOR THE SERVICES – AVERAGE PER YEAR

	EUROPE								
Roadside assistance to your vehicle	**110 €**	126 €	99 €	106 €	117 €	97€	154 €	112 €	68€
Replacement car	**108 €**	157 €	99 €	148 €	83 €	142€	98 €	75 €	61€
Repair on the spot **	**107 €**	118 €	84 €	155 €	91 €	99€	122 €	104 €	82€
Mobility services for you and your passengers if your vehicle is immobilized	**114 €**	148 €	146 €	152 €	102 €	112€	83 €	128 €	44€
Over the phone resolution / car problem fixing	**103 €**	111 €	105 €	244 €	72 €	59€	98 €	102 €	31€
Access to garages which quality is certified	**117 €**	109 €	94 €	214 €	141 €	161€	83 €	66 €	68€
Tyre protection	**126 €**	148 €	135 €	315 €	96 €	71€	149 €	45 €	52€
Car Drop-off	**137 €**	152 €	143 €	243 €	164 €	84€	175 €	70 €	61€
Hotel accommodation during the repairs of your car*	**122 €**	93 €	76 €	152 €	91 €	236€	186 €	89 €	56€
Access to financing solutions for vehicle repairs	**159 €**	334 €	164 €	200 €	162 €	60€	184 €	108 €	57€
Possibility to upgrade roadside assistance benefits at your own cost	**209 €**	322 €	122 €	440 €	380 €	84€	175 €	66 €	79€

New question 2023

** new item 2023 / ** change in item*

Q49C - How much would you be willing to pay for this/these services as option on top of a standard roadside assistance cover? Base : Car owners who are willing to pay for at least one of the services

XX significantly superior to European average
XX significantly inferior to European average

HALF OF THE DRIVERS WILL BE WILLING TO PAY UNDER 50€ FOR THESE SERVICES ON AVERAGE ACROSS EUROPE

NEW

ACCEPTABLE COST FOR THE SERVICES – % LESS THAN 50€ PER YEAR

	EUROPE								
Roadside assistance to your vehicle	**49**	36	52	53	48	60	51	42	71
Replacement car	**55**	51	54	57	55	62	56	47	71
Repair on the spot **	**50**	48	54	44	48	59	53	45	69
Mobility services for you and your passengers if your vehicle is immobilized	**60**	52	56	59	58	71	64	58	83
Over the phone resolution / car problem fixing	**64**	64	68	58	65	73	61	60	87
Access to garages which quality is certified	**60**	55	69	56	55	65	60	53	72
Tyre protection	**62**	66	64	45	61	72	67	66	79
Car Drop-off	**56**	50	63	56	50	72	56	59	78
Hotel accommodation during the repairs of your car*	**55**	53	55	50	56	64	57	53	73
Access to financing solutions for vehicle repairs	**52**	53	53	46	49	59	58	48	79
Possibility to upgrade roadside assistance benefits at your own cost	**49**	45	47	31	48	68	52	71	68

** new item 2023 / ** change in item*

New question 2023

Q49C - How much would you be willing to pay for this/these services as option on top of a standard roadside assistance cover? Base : Car owners who are willing to pay for at least one of the services

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PICK-UP & DELIVERY SERVICE SEEMS PARTICULARLY INTERESTING IN CASE OF REPAIR OR MAINTENANCE.

INTEREST IN PICK UP AND DELIVERY SERVICES – TOTAL INTERESTED %

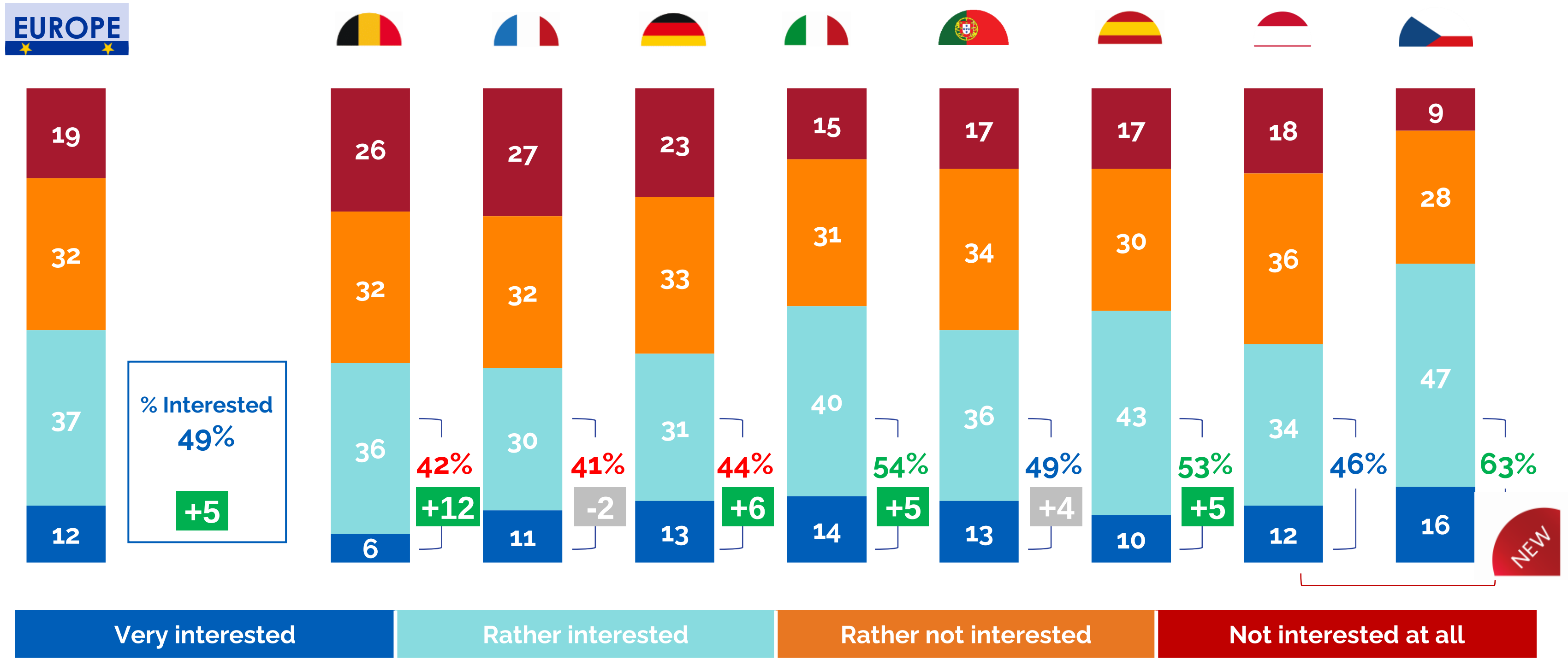
	EUROPE																	
Have your vehicle repaired, maintained or serviced by a WS / garage	**67**	-1	59	=	63	=	61	+3	74	+1	76	-1	76	-3	61	-	64	-
Take delivery of your vehicle at your doorstep	**58**	+1	48	+5	59	+4	49	+4	62	=	68	-2	63	-3	48	-	67	-
Sell your vehicle, picking the vehicle from your doorstep and deliver it to the buyer	**51**	=	44	+4	49	+1	42	+2	58	+2	56	-5	57	-4	43	-	59	-
Test drive a vehicle at your doorstep	**50**	+1	43	+5	47	+1	41	-1	54	+2	56	-2	55	-3	44	-	63	-

Q50 – Would you be interested in a Car Pick-up & Delivery service: a trusted personnel delivering or collecting your vehicle at your doorstep (home, or office) at your convenience, with you having full service control & visibility on your smartphone, for the following situations? Base : Car Owners

XX significantly superior to European average
XX significantly inferior to European average

A GROWING INTEREST IN EUROPE FOR ALTERNATIVE MOBILITY SOLUTIONS

INTEREST FOR ALTERNATIVE MOBILITY SOLUTIONS (CAR OWNERS)



Q53 – Instead of being provided by a replacement car in case your car is being immobilized after an accident or breakdown, would you be interested in using a mobility budget: a digital wallet giving you access to multiple mobility and transportation means?
Base : Car owners

XX significantly superior to European average
XX significantly inferior to European average

MOBILITY BUDGET INTENDERS

49% of the Europeans car owners

COUNTRY

BE	FR	DE	IT	PT	ES	AT	CZ
42%	41%	44%	54%	49%	53%	46%	63%

In Belgium, 42% of the car owners are interested by the mobility budget. Significantly less than the European average of 49%.

GENDER*

Women	Men
50%	50%
48%	52%

HOUSEHOLD*

With children (under 16y.o.) : 33%

24%

Without children (under 16y.o.) : 67%

76%

AGE*

	<35	35-54	>55
	31%	38%	31%
	23%	34%	43%

EMPLOYMENT*

	Employed	Unemployed	Inactive
	61%	6%	33%
	51%	6%	43%

MARKET SIZE*

	Cities	Towns and suburbs	Rural areas
	38%	37%	25%
	36%	38%	26%

Who are they?

- **Rather young** people, **without children** (67%) who **are employed** (61%), lived in **cities** (38%) and have **high incomes** (44%)

What do they do?

- They use more all type of transportation (Car, public transportation etc)
- They drive their personal car (26%) and walk (41%) today more than 5 years ago
- They have a **higher mobility budget** (187€ per month vs 147€)
- They **work more often from their home** (58% vs 49%)
- They own more bicycles (75% vs 62%)
- They use fewer thermic cars (81% vs 88%)

What do they want?

- They consider buying a new car in the next 12 months (55%), rather an EV (46%) than a thermic car (41%)
- They **consider more not having a personal car in the future** (41% vs 30%)

About New Offers?

- They are interested in **insurance covering all your travels and mobility situations** (67% vs 46%)

To be noted: These people are more concerned about environment in general,and do more efforts already to reduce their footprint.

*Based on the 8 countries

The comparisons (VS) are with the General population of the 8 countries tested.

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NEW

THE AVERAGE ACCEPTABLE MOBILITY BUDGET WOULD BE AROUND 129€ INSTEAD OF A REPLACEMENT CAR AND 82€ INSTEAD OF HAVING A TAXI, WITH DIFFERENCES BY COUNTRY

ACCEPTABLE MOBILITY BUDGET INSTEAD OF REPLACEMENT CAR - AVERAGE

EUROPE

Instead of being granted **3 days of replacement / rental car**

129 €

Instead of being granted **a taxi** when close to your home

82 €

140 €
vs. replacement car
103 €
vs. taxi

129 €
vs. replacement car
72 €
vs. taxi

186 €
vs. replacement car
111 €
vs. taxi

184 €
vs. replacement car
121 €
vs. taxi

108 €
vs. replacement car
69 €
vs. taxi

136 €
vs. replacement car
67 €
vs. taxi

112 €
vs. replacement car
75 €
vs. taxi

68 €
vs. replacement car
52 €
vs. taxi

XX significantly superior to European average
XX significantly inferior to European average

Exchange rate applied : 1 CZK = €0,04

NEW3 - Which minimum mobility budget amount would lead you to choose this instead of replacement car / taxi?
Base : Interested by mobility budget

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KEY LEARNINGS

KEY LEARNINGS

Mobility habits :

- ✓ **No major evolutions since last year in European's mobility habits :** car stays widespread, bicycles are still used by almost 4 Europeans out of 10 even if it tends to decrease slightly
- ✓ **A strong attachment to personal cars still** : even if 30% of Europeans say they could give up their personal car in the future, this figure doesn't increase.
- ✓ **Mobility budget stays important :** 143€ per month on average (stable). **Cost of transport stays a major issue** in European's minds.

Focus EV

- ✓ If thermic cars stay the major motorisations today, **both Petrol and Diesel tend to decrease.**
- ✓ **An interest that stays strong for EV :** 29% of Europeans could be interested to acquire one (stable vs last year)
- ✓ EV intenders have a **distinctive profile** : more males, urban, young, active. Already sensitive to environment, but they are also largely motivated to buy EVs due to theincrease of fuel costs.
- ✓ Barriers to EV purchase, however, are dominated by cost of acquisition, whereas issues about charging stations are less present this year.

Micromobility and bicycles

- ✓ **An intensification of electric bikes usage** this year
- ✓ More users of micro-mobility devices or bicycles say they **are covered by an insurance or would be interested to be.**
- ✓ **Almost half** (46%) of Europaeans would be **interested in a person-based insurance** (stable overall, but increase in Belgium, France and Italy)

KEY LEARNINGS

Car insurance and associated services

- ✓ **Roadside assistancce and replacement car** are the 2 most important services when choosing an insurance
- ✓ Overall, **car owners would be willing to dediacte on average 20% of their insurance** budget to be covered for these assistance and mobility services
- ✓ The preferred way to contact the roadside assistance service provider is **talking to a human operator over the phone**, whatever the situation. Digital channels such as WhatsApp or digital self-service could be accepted, but less than human contact.

Assistance services

- ✓ In terms of service commitments, **time to arrival of the patrol / towing truck** on the spot is by far the first expectation
- ✓ **Roadside assistance and replacement car** are the most important services, and the ones with the highest willingness to pay for
- ✓ A **growing interest for alternative mobility solutions** this year (+5 points)

QUESTIONS?

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You act better when you are sure.