MOBILITY BAROMETER AMONG EUROPEANS

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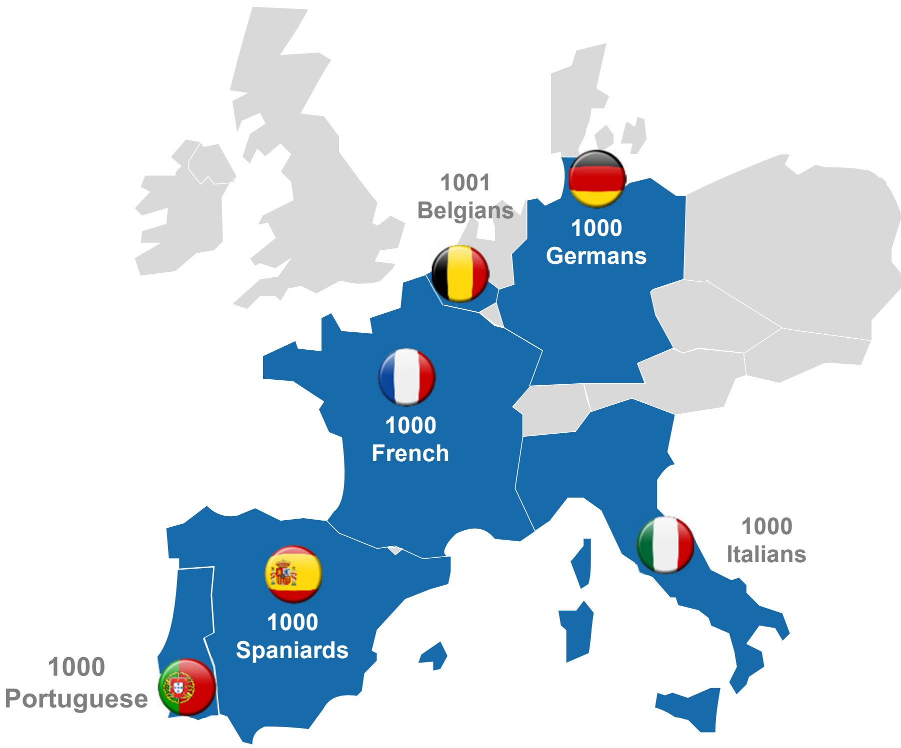
SCOPE OF THE SURVEY



6
countries

6001
interviews

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

FIELDWORK DATES
November 29th - December 9th, 2022

DATA COLLECTION
Online survey via Ipsos panels

1.

MOBILITY HABITS IN EUROPE

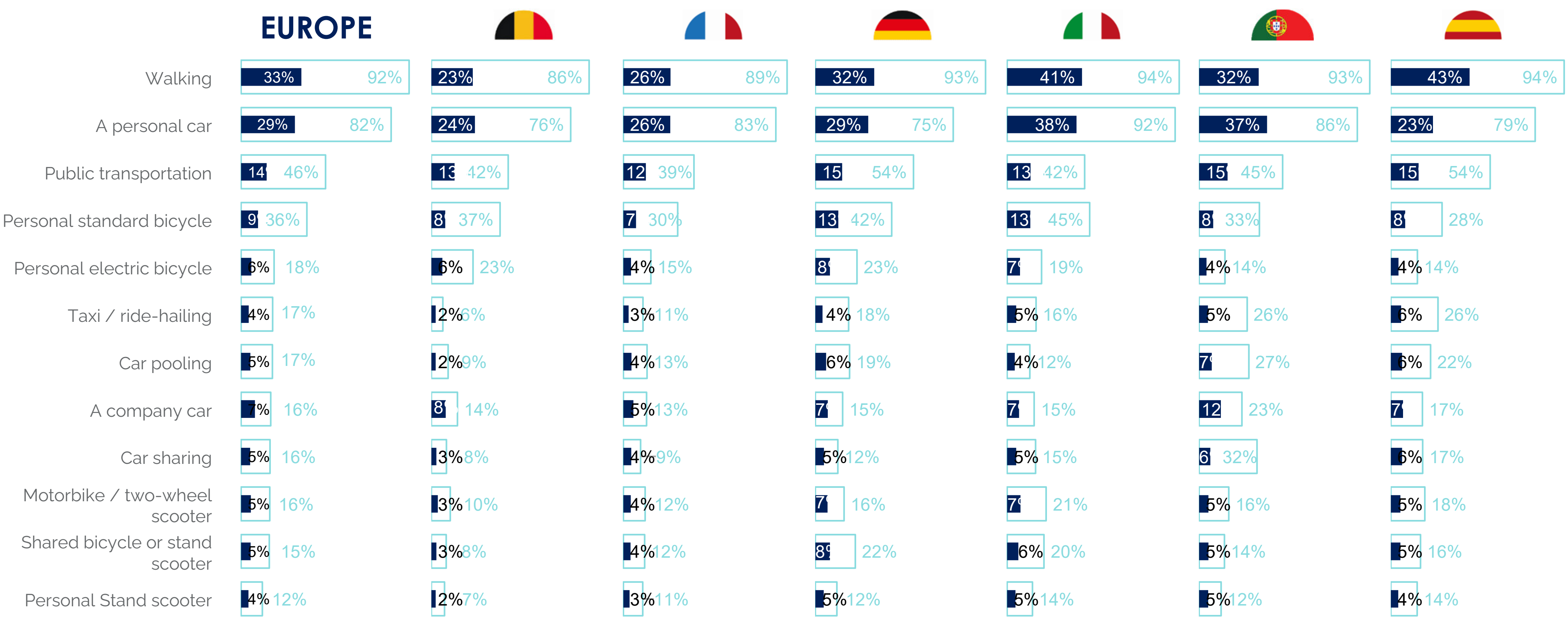
KEY INSIGHTS

- If the vast majority of Europeans still drive a car on a regular basis (second transportation mode used after walking), almost half of them also use bicycles, electric bikes being adopted by 1 out of 5.
- Despite the development of home office since Covid, Europeans continue to commute, with commuting distances exceeding 10km for half of them.
- In a context of inflation and energy crisis, mobility represents a significant monthly budget : 133€ on average.
- Since Covid, some evolutions have been operated in mobility habits : walking, bicycles and scooters have become more popular, whereas means of transportation involving too much proximity (car-sharing, care-pooling, public transportation) have been reduced.
- Changes in mobility habits have been triggered mainly by 2 dimensions : cost, and environmental concerns. Professional reasons (including new ways of working) come after in 3rd position.
- In future intentions, the only mode that shows a positive delta is walking : all other modes of transportation, including personal cars, could be used less frequently. A general wish for less mobility?

1.1
CURRENT MOBILITY HABITS

WALKING AND USING A PERSONAL CAR ARE THE MOST WIDESPREAD MODES OF TRANSPORTATION ON WEEKDAYS, FOLLOWED BY PUBLIC TRANSPORTATION AND PERSONAL BICYCLES

MODES OF TRANSPORTATION USED ON WEEKDAYS

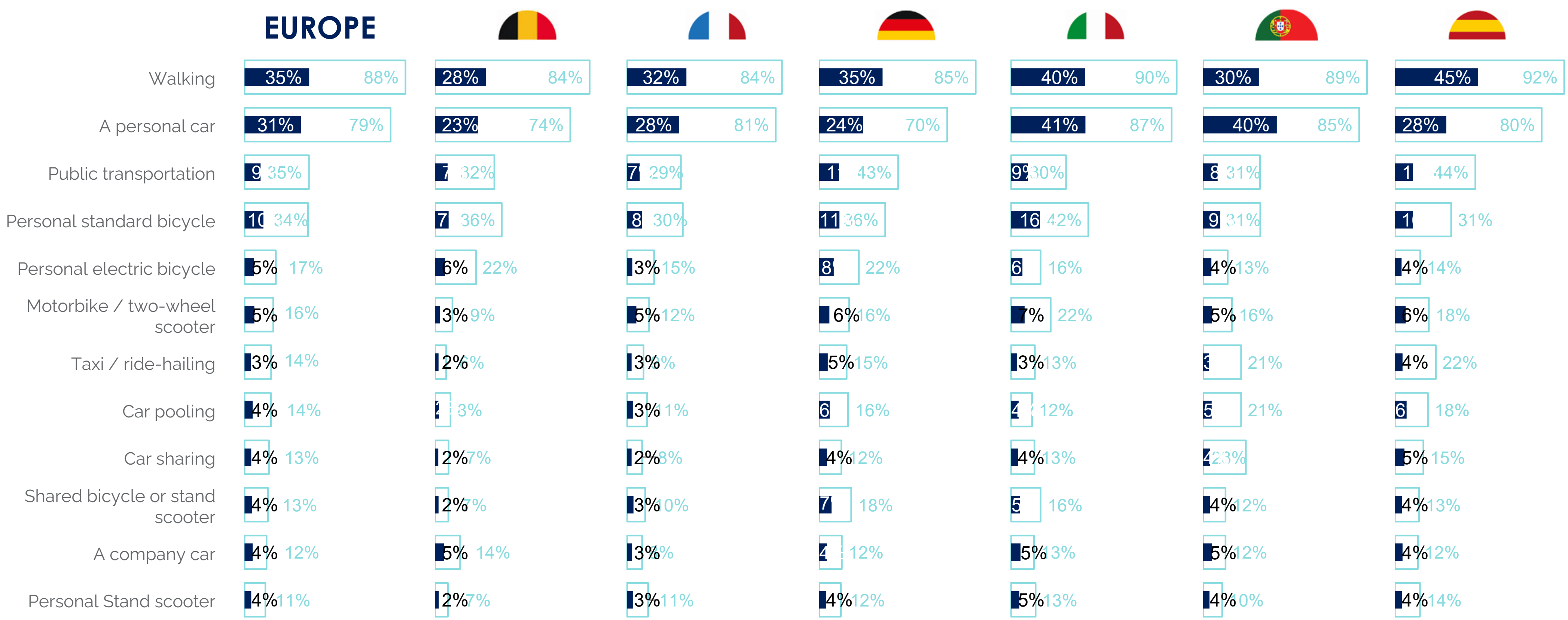


Q1 – On average, on a normal weekday (Mondays to Fridays), how long do you use each one of the following modes of transportation each day?
Base : All

Used – **More than 1 hour a day**

A SIMILAR USE OF MODES OF TRANSPORTATION ON WEEKENDS

MODES OF TRANSPORTATION USED ON WEEKENDS



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

Used – More than 1 hour a day

PERSONAL CARS ARE MORE USED IN ITALY AND SPAIN, ELECTRIC BICYCLES IN BELGIUM AND GERMANY

MODES OF TRANSPORTATION USED OVERALL – AT LEAST ONE USE %

	EUROPE						
Walking	94	91	92	94	96	96	97
A personal car	86	80	87	78	94	90	85
Public transportation	49	46	41	56	45	48	59
Personal standard bicycle	41	43	36	46	50	37	35
Personal electric bicycle	20	25	17	24	21	16	16
Car pooling	20	11	16	21	14	32	25
Taxi / ride-hailing	20	8	12	21	18	29	30
Motorbike / two-wheel scooter	18	11	14	18	24	19	21
Car sharing	18	10	11	15	17	36	20
Shared bicycle or stand scooter	18	10	13	24	23	17	18
A company car	18	16	13	16	16	24	19
Personal Stand scooter	13	8	13	14	16	14	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? / 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 : Modes of transportation users

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

OVERALL, THE USE OF CARS PREVAILS, PARTICULARLY IN ITALY AND PORTUGAL. BICYCLES AND STAND SCOOTERS ARE MORE USED IN GERMANY AND ITALY

MODES OF TRANSPORTATION USED OVERALL– AT LEAST ONE USE %

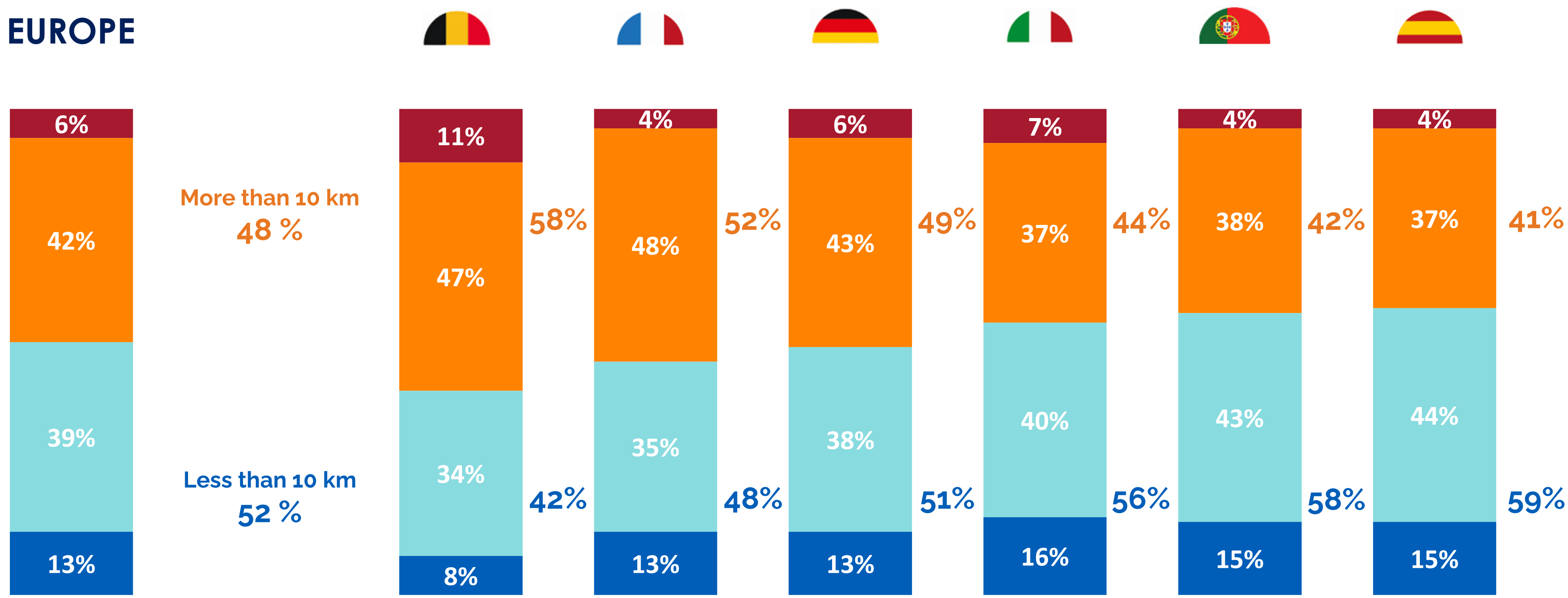
	EUROPE						
WEEKDAYS USERS							
Car Users	83	80	84	76	92	87	80
Bicycle Users	41	49	34	50	48	35	30
Stand scooter Users	18	10	15	24	23	18	20
WEEKENDS USERS							
Car Users	81	78	82	71	88	86	81
Bicycle Users	40	48	35	45	44	33	32
Stand scooter Users	15	10	14	19	18	15	17
TOTAL USERS							
Car Users	87	84	87	78	94	90	86
Bicycle Users	46	55	40	54	52	39	36
Stand scooter Users	21	12	17	26	26	20	22

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 : Modes of transportation users

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

HALF OF COMMUTING TRIPS ARE LESS THAN 10KM. BELGIUM SHOWS LONGER TRIPS.

DISTANCE HOME > PLACE OF WORK OR STUDIES



Less than 1km – 1km to less than 10km - 10km to less than 50km – More than 50km

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

A LARGE MAJORITY OF EUROPEAN WORK AT LEAST ONE DAY PER WEEK AT HOME. GERMANY IS THE COUNTRY WHERE HOMEWORKING IS THE MOST DEVELOPED, WITH HALF OF THE WEEK AT HOME ON AVERAGE, WHILE IT IS SLIGHTLY LESS COMMON IN FRANCE AND IN BELGIUM.

WORK FROM HOME – NUMBER OF DAYS PER WEEK

	EUROPE						
	2.0	1.6	1.6	2.4	2.0	2.2	2.1
At least one day	80%	76%	69%	88%	83%	83%	81%
1 or 2 days	47%	54%	43%	45%	51%	45%	45%
3 days or more	33%	22%	26%	43%	32%	38%	36%

Q8 – During a typical week, how many days do you work from home?
Base : Employed

IN A CONTEXT OF INFLATION, MOBILITY REPRESENTS A SIGNIFICANT BUDGET ACROSS EUROPE

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

Country	Monthly budget	More than 100€
EUROPE	133 €	34 %
Belgium	128 €	35 %
France	145 €	38 %
Germany	134 €	30 %
Italy	135 €	33 %
Portugal	150 €	37 %
Spain	109 €	28 %

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

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

1.2
EVOLUTIONS SINCE COVID

THE COVID CRISIS HAS LED TO AN INCREASE OF WALKING AND PERSONAL TWO-WHEELED VEHICLES USE IN PRIORITY…

USE MORE FREQUENTLY THAN BEFORE COVID %

	EUROPE						
Walking	31	26	32	26	39	31	32
Personal electric bicycle	30	36	41	27	28	27	23
Personal Stand scooter	28	24	35	27	30	20	28
Motorbike / two-wheel scooter	25	22	27	20	26	26	26
Personal standard bicycle	25	17	27	21	30	30	23
Shared bicycle or stand scooter	24	27	29	19	29	25	20
Taxi / ride-hailing	21	21	33	19	17	27	15
Car sharing	20	16	26	20	19	23	15
Car pooling	20	23	28	17	18	24	13
Public transportation	19	21	18	14	18	27	17
A company car	18	20	21	16	21	19	15
A personal car	16	7	14	13	18	29	15

Q3 – 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

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

…WHEREAS MODES INVOLVING SHARING CARS WITH OTHERS, AS WELL AS PUBLIC TRANSPORTATION HAVE DECLINED (PROXIMITY WITH STRANGERS)

USE LESS FREQUENTLY THAN BEFORE COVID %

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

Q3 – 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

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

ELECTRIC BICYCLE HAS PROGRESSED PARTICULARLY IN FRANCE

MOBILITY HABITS EVOLUTION - %

More frequently than before Covid – Equally frequently – Less frequently

	EUROPE																				
Walking	31	63	6	26	69	5	32	64	4	26	69	5	39	55	6	31	59	10	32	63	5
Personal electric bicycle	30	55	15	36	59	5	41	50	9	27	61	12	28	48	24	27	43	30	23	63	14
Personal Stand scooter	28	49	23	24	51	25	35	47	18	27	45	28	30	50	20	20	50	30	28	53	19
Personal standard bicycle	25	62	13	17	72	11	27	61	12	21	67	12	30	56	14	30	53	17	23	61	16
Motorbike / two-wheel scooter	25	57	18	22	57	21	27	55	18	20	61	19	26	55	19	26	59	15	26	56	18
Shared bicycle or stand scooter	24	54	22	27	47	26	29	47	24	19	67	14	29	47	24	25	46	29	20	60	20
Taxi / ride-hailing	21	54	25	21	52	27	33	46	21	19	55	26	17	54	29	27	49	24	15	60	25
Car pooling	20	53	27	23	59	18	28	44	28	17	55	28	18	52	30	24	49	27	13	60	27
Car sharing	20	50	30	16	53	31	26	44	30	20	51	29	19	54	27	23	46	31	15	55	30
Public transportation	19	56	25	21	58	21	18	58	24	14	62	24	18	51	31	27	45	28	17	62	21
A company car	18	61	21	20	59	21	21	55	24	16	63	21	21	54	25	19	64	17	15	64	21
A personal car	16	68	16	7	72	21	14	67	19	13	73	14	18	67	15	29	60	11	15	69	16

Q3 – 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

FINALLY, CAR SHARING SHOWS THE MOST NEGATIVE DELTA OF USE

DELTA USE (MORE – LESS) %

	EUROPE						
Walking	25	21	28	21	33	21	27
Personal electric bicycle	15	31	32	15	4	-3	9
Personal standard bicycle	12	6	15	9	16	13	7
Motorbike / two-wheel scooter	7	1	9	1	7	11	8
Personal Stand scooter	5	-1	17	-1	10	-10	9
Shared bicycle or stand scooter	2	1	5	5	5	-4	0
A personal car	0	-14	-5	-1	3	18	-1
A company car	-3	-1	-3	-5	-4	2	-6
Taxi / ride-hailing	-4	-6	12	-7	-12	3	-10
Public transportation	-6	0	-6	-10	-13	-1	-4
Car pooling	-7	5	0	-11	-12	-3	-14
Car sharing	-10	-15	-4	-9	-8	-8	-15

Q3 – 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 ECONOMICAL AND ENVIRONMENTAL REASONS, PARTICULARLY IN FRANCE

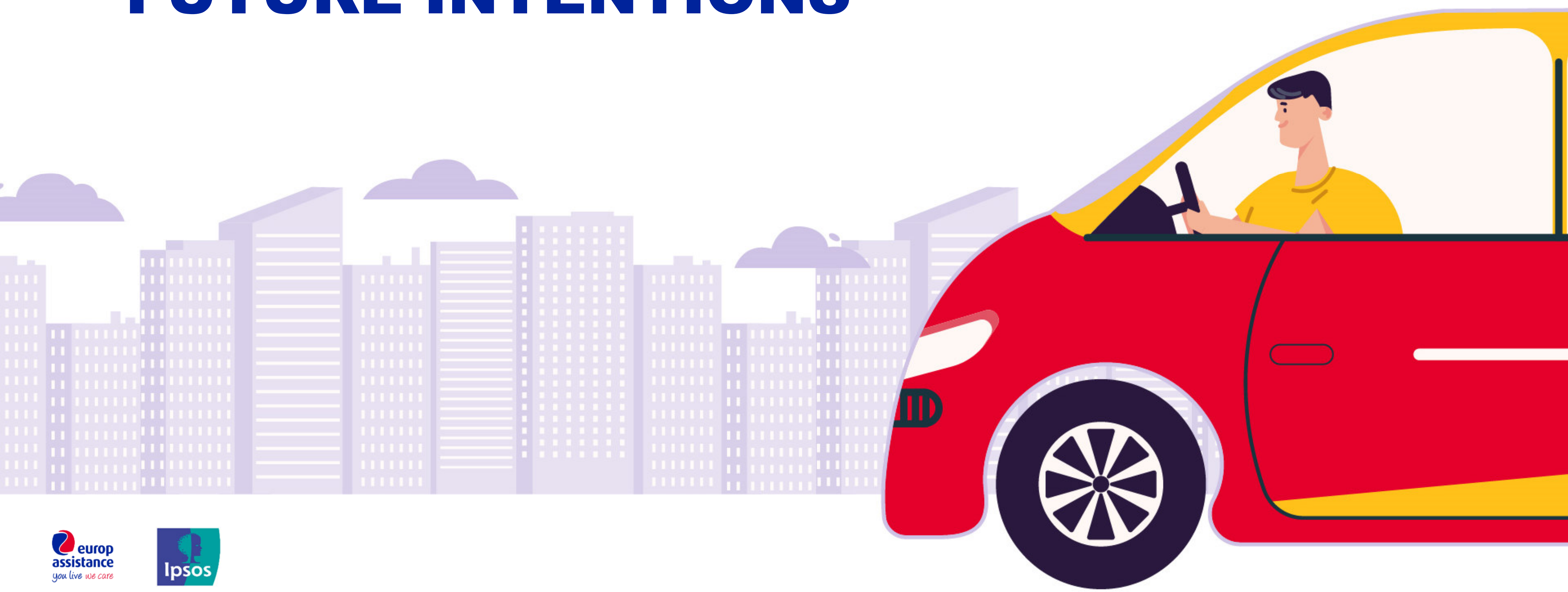
MOBILITY HABITS EVOLUTION REASONS %

	EUROPE						
NET Professional reason	30	31	24	32	28	35	28
NET Personal reason	28	25	21	30	30	30	33
I am concerned about cost of transports	40	46	50	30	34	41	36
I am concerned about environmental impact of transports	36	30	41	35	37	34	37
I have more flexibility on ways of working	21	20	15	23	22	25	21
My family / personal situation evolved	20	16	12	23	22	20	24
I moved to another place of residence	11	11	11	11	10	13	12
I started a new job	10	13	10	11	8	13	9
Other, specify	12	16	13	14	9	11	9

Q4 – You said that you have changed your mobility habits compared to last year. Among the following reasons below, what are the main ones explaining this evolution ?
Base : Have changed their mobility habits

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

1.3
FUTURE INTENTIONS



EUROPEANS INTEND TO WALK MORE, BUT ALSO TO USE A BIT MORE PUBLIC TRANSPORTATION AND PERSONAL STANDARD BICYCLE, PARTICULARLY IN ITALY AND PORTUGAL

INTENTION TO USE MORE FREQUENTLY THAN TODAY %

	EUROPE						
Walking	29	23	25	19	39	39	29
Public transportation	13	11	11	10	15	17	14
Personal standard bicycle	13	12	12	9	19	17	10
A personal car	11	5	9	9	13	17	13
Personal electric bicycle	7	7	7	7	8	7	5
Car pooling	5	4	5	4	3	8	6
Motorbike / two-wheel scooter	5	3	4	3	6	7	4
A company car	4	3	3	3	5	6	4
Car sharing	4	3	3	3	5	10	5
Taxi / ride-hailing	4	2	4	3	5	5	4
Personal Stand scooter	4	2	4	3	6	4	4
Shared bicycle or stand scooter	4	3	4	4	7	6	4

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 : All

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

OVERALL, AN ANTICIPATED DECREASE IN FREQUENCY OF USE FOR ALMOST ALL MODES: AN OVERALL ANTICIPATED DECREASE OF MOBILITY FREQUENCY

INTENTION TO USE LESS FREQUENTLY THAN TODAY %

	EUROPE						
A company car	36	34	43	31	40	35	30
Car sharing	36	36	43	30	42	33	30
Personal Stand scooter	36	35	42	29	40	41	31
Shared bicycle or stand scooter	36	36	42	27	38	39	32
Car pooling	35	34	41	29	43	33	28
Motorbike / two-wheel scooter	35	35	41	29	38	37	30
Taxi / ride-hailing	35	36	42	30	43	36	26
Personal electric bicycle	33	30	39	25	37	38	30
Personal standard bicycle	26	25	31	23	26	26	25
Public transportation	25	24	28	22	28	27	17
A personal car	18	21	19	18	18	18	16
Walking	8	8	8	8	7	9	6

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 : All

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

WALKING IS PLEBISCITED IN EUROPE

INTENTION OF USE - %

More frequently than today – Equally frequently – Less frequently

	EUROPE						
Walking	29 / 63 / 8	23 / 69 / 8	25 / 67 / 8	19 / 73 / 8	39 / 54 / 7	39 / 52 / 9	29 / 65 / 6
Personal standard bicycle	13 / 61 / 26	12 / 63 / 25	12 / 57 / 31	9 / 68 / 23	19 / 55 / 26	17 / 57 / 26	10 / 65 / 25
Public transportation	13 / 62 / 25	11 / 65 / 24	11 / 61 / 28	10 / 68 / 22	15 / 57 / 28	17 / 56 / 27	14 / 69 / 17
A personal car	11 / 71 / 18	5 / 74 / 21	9 / 72 / 19	9 / 73 / 18	13 / 69 / 18	17 / 65 / 18	13 / 71 / 16
Personal electric bicycle	7 / 60 / 33	7 / 63 / 30	7 / 54 / 39	7 / 68 / 25	8 / 55 / 37	7 / 55 / 38	5 / 65 / 30
Motorbike / two-wheel scooter	5 / 60 / 35	3 / 62 / 35	4 / 55 / 41	3 / 68 / 29	6 / 56 / 38	7 / 56 / 37	4 / 66 / 30
Car pooling	5 / 60 / 35	4 / 62 / 34	5 / 54 / 41	4 / 67 / 29	3 / 54 / 43	8 / 59 / 33	6 / 66 / 28
Shared bicycle or stand scooter	4 / 60 / 36	3 / 61 / 36	4 / 54 / 42	4 / 69 / 27	7 / 55 / 38	6 / 55 / 39	4 / 64 / 32
Personal Stand scooter	4 / 60 / 36	2 / 63 / 35	4 / 54 / 42	3 / 68 / 29	6 / 54 / 40	4 / 55 / 41	4 / 65 / 31
Taxi / ride-hailing	4 / 61 / 35	2 / 62 / 36	4 / 54 / 42	3 / 67 / 30	5 / 52 / 43	5 / 59 / 36	4 / 70 / 26
Car sharing	4 / 60 / 36	3 / 61 / 36	3 / 54 / 43	3 / 67 / 30	5 / 53 / 42	10 / 57 / 33	5 / 65 / 30
A company car	4 / 60 / 36	3 / 63 / 34	3 / 54 / 43	3 / 66 / 31	5 / 55 / 40	6 / 59 / 35	4 / 66 / 30

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 : All

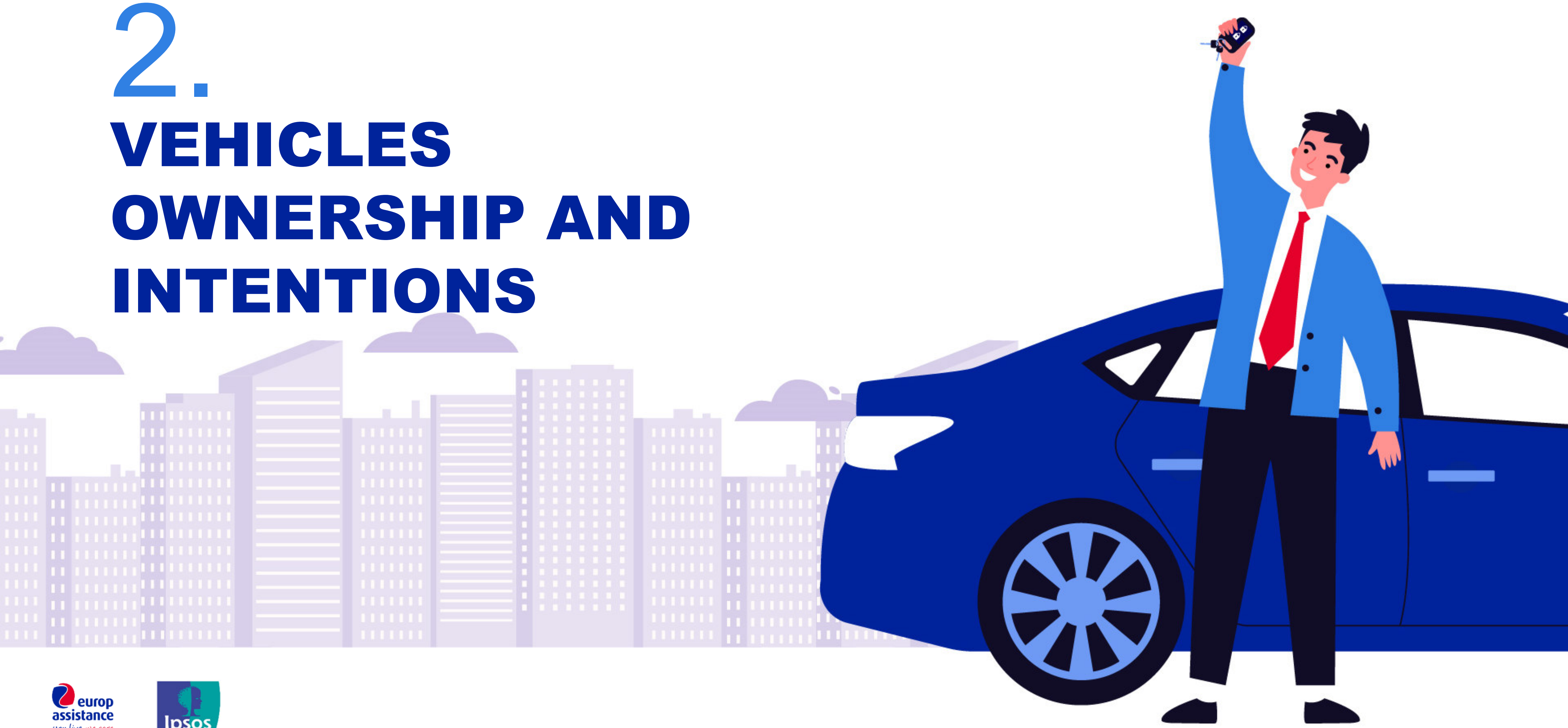
FINALLY, A NEGATIVE DELTA FOR MODES OF TRANSPORTATION, EXCEPT WALKING

DELTA INTENTION OF USE (MORE – LESS) %

	EUROPE						
Walking	21	15	17	11	32	30	23
A personal car	-7	-16	-10	-9	-5	-1	-3
Public transportation	-12	-13	-17	-12	-13	-10	-3
Personal standard bicycle	-13	-13	-19	-14	-7	-9	-15
Personal electric bicycle	-26	-23	-32	-18	-29	-31	-25
Car pooling	-30	-30	-36	-25	-40	-25	-22
Motorbike / two-wheel scooter	-30	-32	-37	-26	-32	-30	-26
Taxi / ride-hailing	-31	-34	-38	-27	-38	-31	-22
A company car	-32	-31	-40	-28	-35	-29	-26
Car sharing	-32	-33	-40	-27	-37	-23	-25
Personal Stand scooter	-32	-33	-38	-26	-34	-37	-27
Shared bicycle or stand scooter	-32	-33	-38	-23	-31	-33	-28

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 : All

2.
VEHICLES OWNERSHIP AND INTENTIONS



KEY INSIGHTS

- Personal cars remain widespread in Europe : almost 9 out of 10 Europeans own a car in their household. Company cars, on the other hand, only concern less than 10% of them.

- The majority of main cars are ICE (Petrol slightly ahead of diesel in Europe), whereas other powertrains remain confidential, except for hybrid representing 5% of main cars.

- In terms of financing methods, purchase prevails. Leasing represents a small part of car acquisition (7% in Europe), more frequent in France. Cars are most often acquired through manufacturer's dealerships, or independent garages.

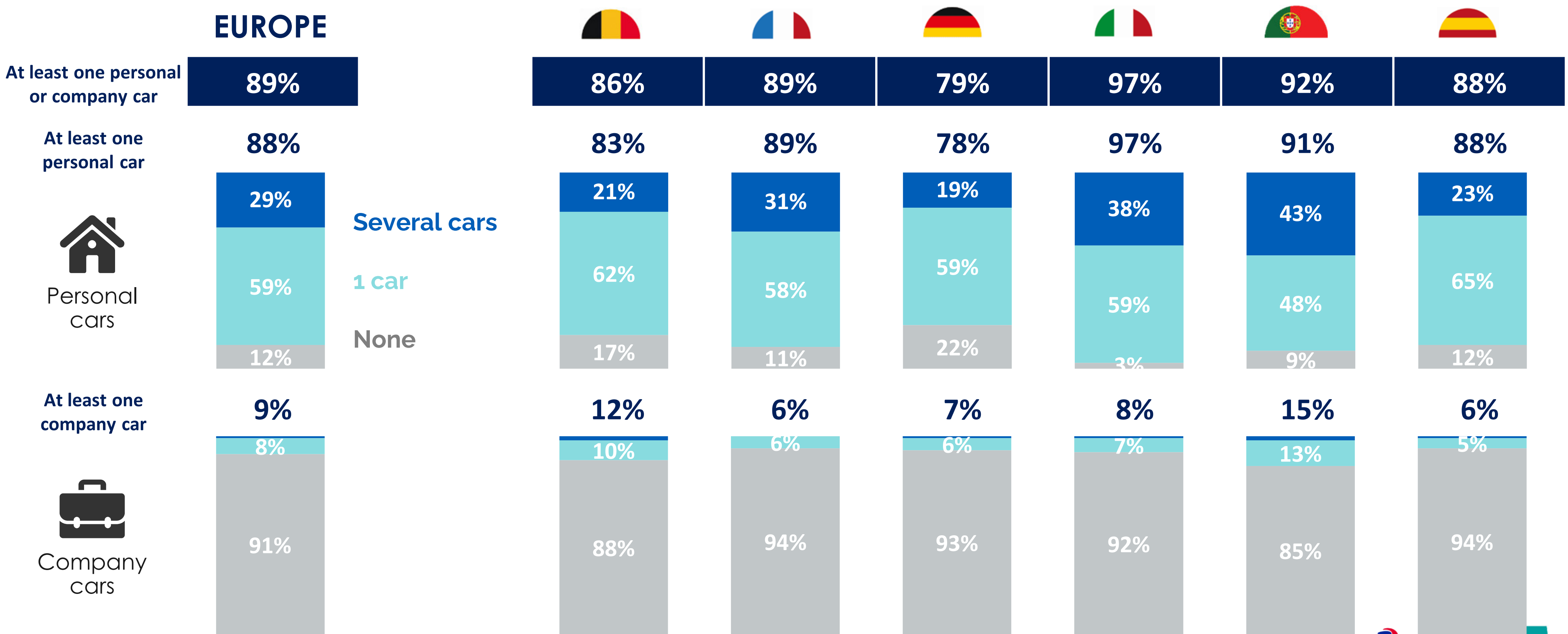
- Maintenance & repairs at garages or workshops are done quite frequently by one third of car owners, the rest of them usually going only once a year.

- Services such as replacement car during repairs, garage certification and car quality guarantee could drive preference if offered by specific garages.

- Electric Vehicles show a significant potential, with almost one third of Europeans intending to buy one. However, cost represents the first barrier to EV purchase, ahead of charging points issues and long-distance trips difficulties.

PERSONAL CAR OWNERSHIP STAYS WIDESPREAD IN EUROPE.

NUMBER OF CARS OWNED BY THE HOUSEHOLD



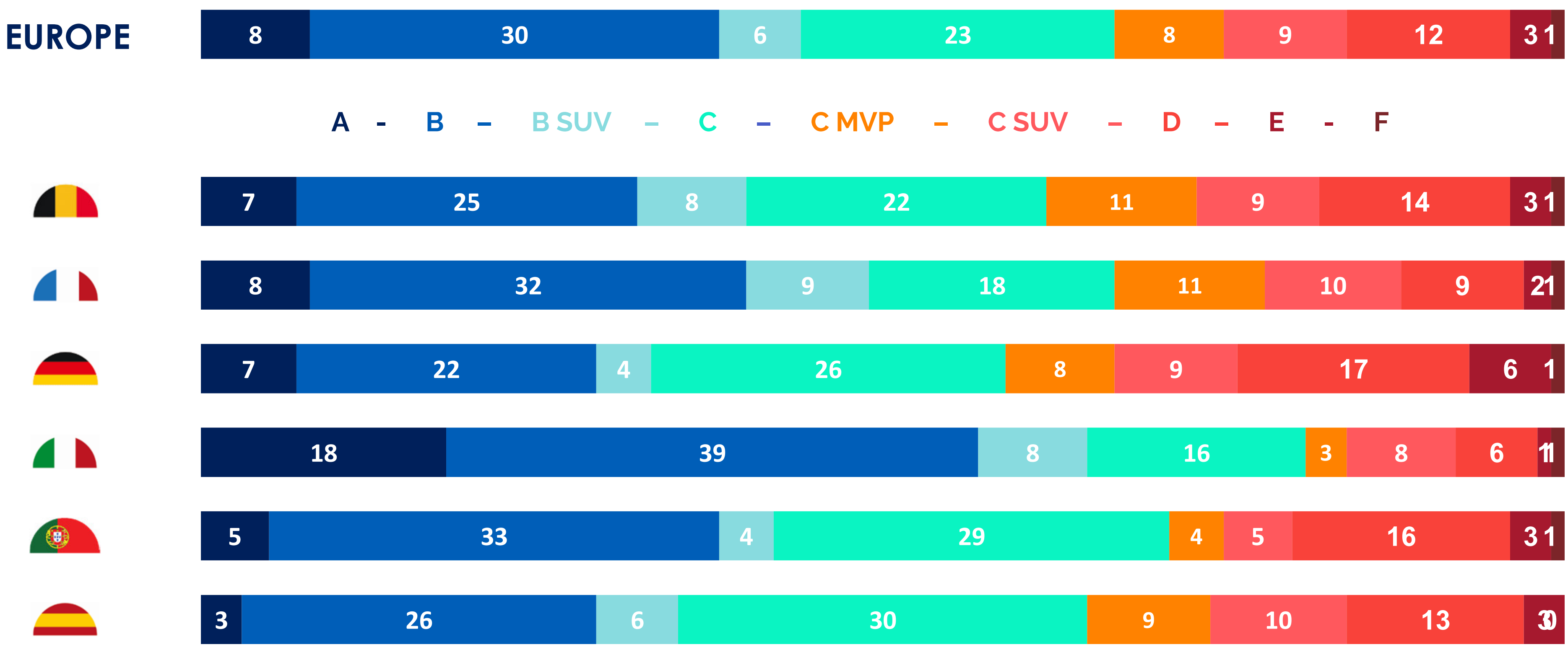
Q11 – How many cars do you own in your household?

Base : All

2.1
CAR USED MOST OFTEN

SEGMENTS B AND C ARE THE MOST COMMON. LARGER CARS IN GERMANY,SMALLER ONES IN ITALY.

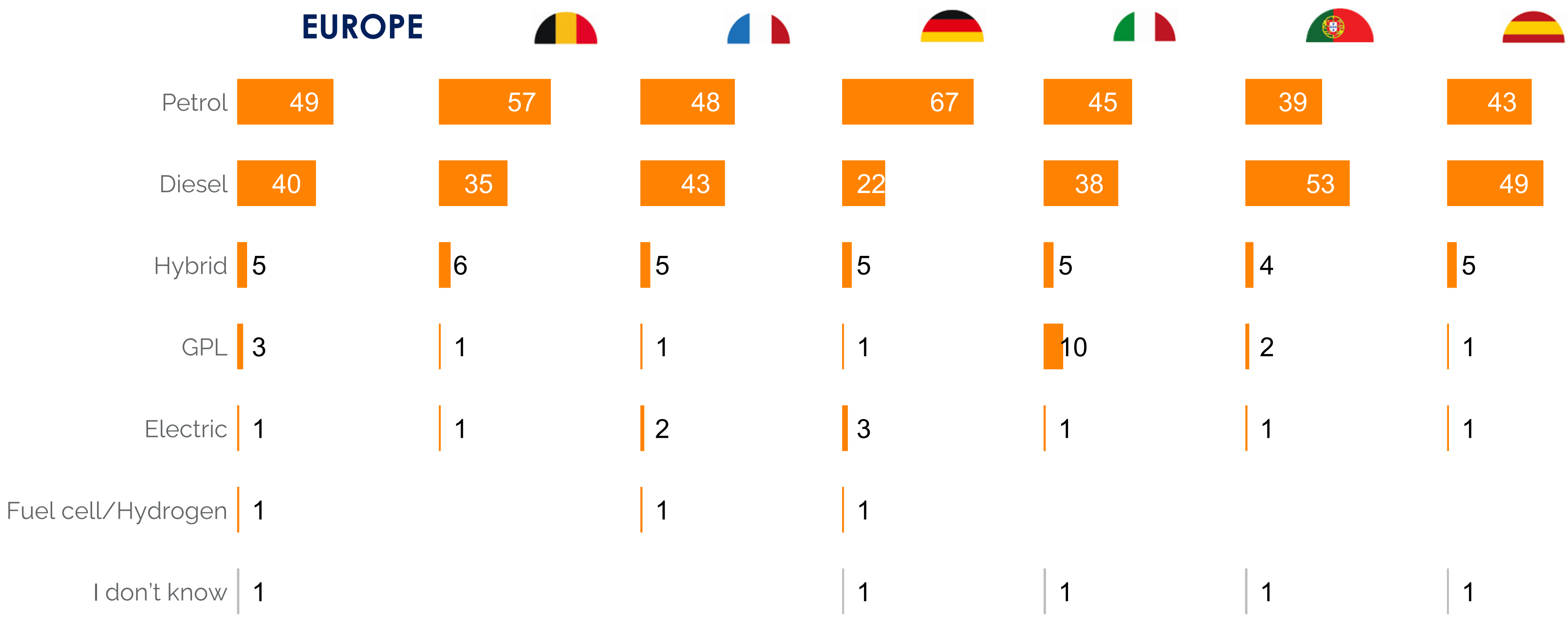
SEGMENT OF THE MAIN CAR %



Q14 – What is the make and model, current mileage, and year of circulation the car that you use the most often? (You personally)]
Base : Car Owners

9 OUT OF 10 MAIN CARS ARE ICE-VEHICLES, WITH A MORE IMPORTANT SHARE OF PETROL VS. DIESEL OVERALL, ESPECIALLY IN GERMANY. IN PORTUGAL, HOWEVER, DIESEL IS MORE COMMON.

POWERTRAIN %



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

ALMOST ONE THIRD OF MAIN CARS WERE ACQUIRED IN THE LAST 3 YEARS – MORE OFTEN THE CASE IN NORTHERN EUROPE COUNTRIES

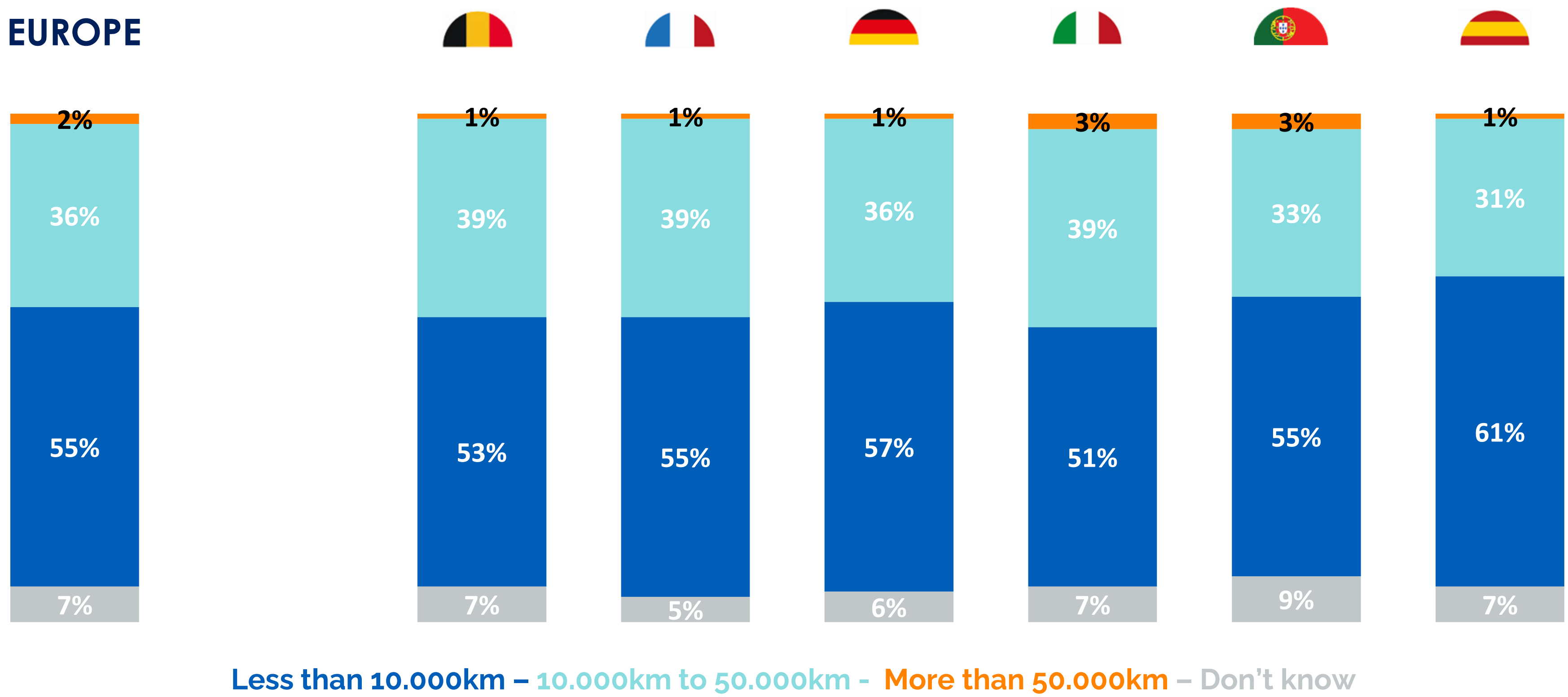
YEAR AND MILEAGE AT ACQUISITION

	EUROPE	Belgium	France	Germany	Italy	Portugal	Spain
Acquired in 2020 - 2022	28%	35%	33%	33%	21%	24%	21%
Average mileage	29 000	18 485	34 304	26 446	20 794	51 818	19 640
Less than 19.999km	71%	79%	62%	70%	76%	59%	82%

Q17 – Which year was this car acquired and what was the mileage of this car when it was acquired? You may give an approximate answer. If your car was bought new, please indicate "0 km"
Base : Car Owners

MORE THAN HALF OF MAIN CARS COVER LESS THAN 10.000KM PER YEAR.

KILOMETERS COVERED PER YEAR



Q18 – Overall, how many kilometres does this car cover per year?
Please count your own usage of this car, as well the usage of other members of your household.
Base : Car owners

A LARGE MAJORITY OF RESPONDENTS PREFERED A PURCHASE SOLUTION TO FINANCE THEIR CAR. LEASING IS SLIGHTLY MORE DEVELOPED IN FRANCE, GERMANY AND SPAIN.

CAR FINANCING %

	EUROPE						
NET Purchase	**87**	**86**	**87**	**88**	**89**	**87**	**87**
It was bought cash (in one time - without credit)	54	54	60	65	48	58	40
It was bought partially cash, partially on credit	21	18	17	16	26	18	30
It was bought totally on credit	12	14	10	7	15	11	17
NET Leasing	**7**	**6**	**9**	**8**	**5**	**7**	**8**
Leasing with initial down payment	4	2	5	4	3	5	5
Leasing without initial down payment	3	4	4	4	2	2	3
It was given for free	**1**	**2**	**1**	**0**	**0**	**2**	**1**
I do not know	**5**	**6**	**3**	**4**	**6**	**4**	**4**

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

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

GERMANS AND BELGIANS BOUGHT THE MOST EXPENSIVE CARS

CAR TOTAL PRICE - AVERAGE

EUROPE

19.215 €

More than 20.000€ :

34 %

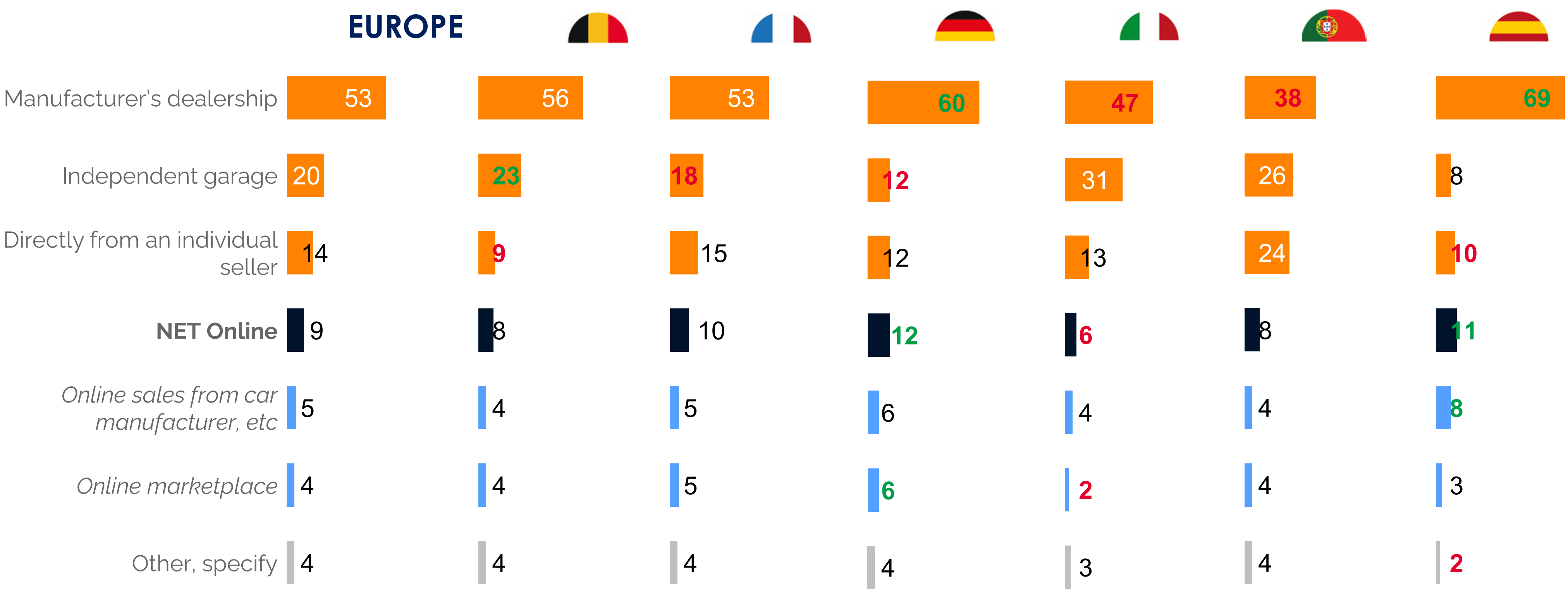
Country	Average	More than 20.000€
Belgium	22.320 €	41 %
France	17.738 €	31 %
Germany	21.908 €	42 %
Italy	15.518 €	26 %
Portugal	19.079 €	31 %
Spain	19.582 €	34 %

Q20 – What was the total price of this car when you acquired it (purchase or total leasing value) ?
Base : Personal car owners

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

HALF OF RESPONDENTS ACQUIRED THEIR CAR IN A DEALERSHIP, INDEPENDENT GARAGES RANK SECOND.

CAR PURCHASE CHANNEL %

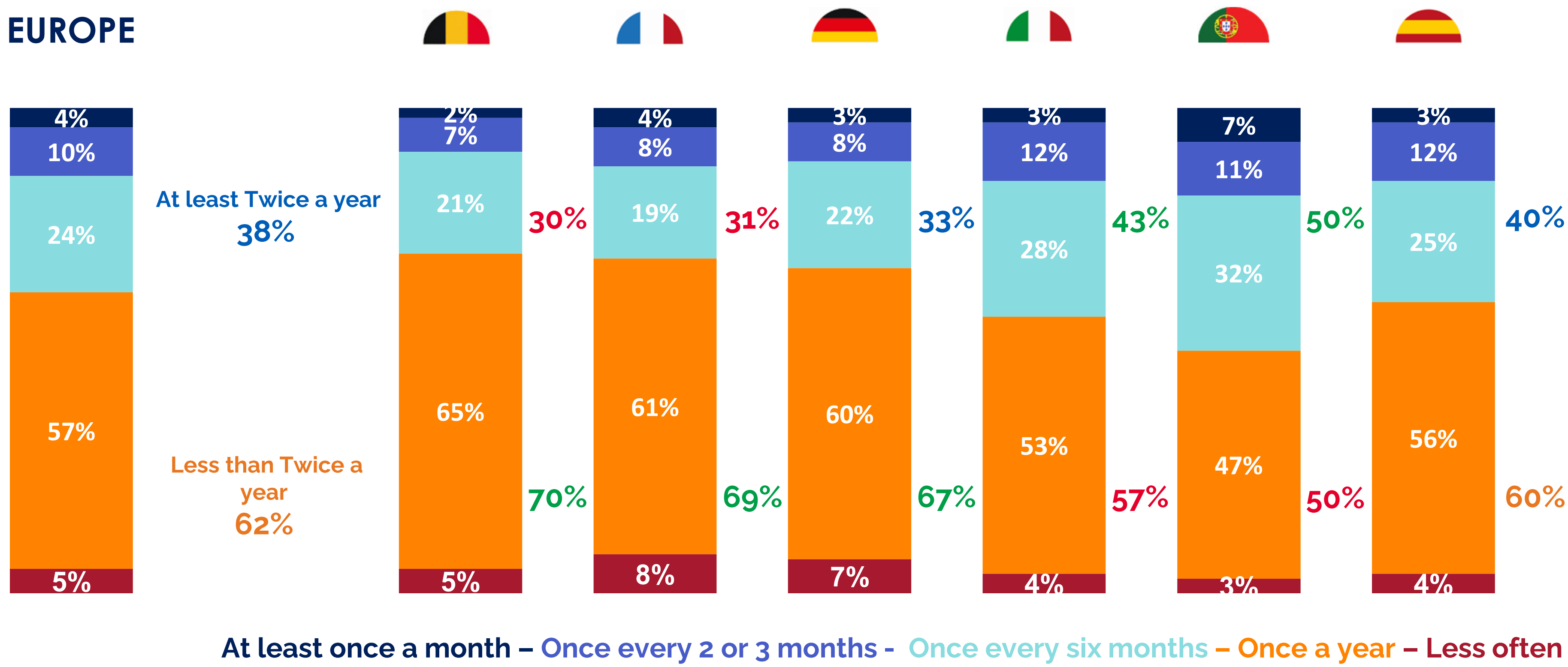


Q21 – Where did you acquire this car?
Base : Personal car owners

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

4 OUT OF 10 RESPONDENTS SEE A PROFESSIONAL FOR CAR MAINTENANCE AT LEAST TWICE A YEAR - AN EVEN HIGHER FREQUENCY IN ITALY AND PORTUGAL.

FREQUENCY OF REPAIR, MAINTENANCE AND SERVICING



Q23 – How often do you go to workshops or garages for your car repairs, maintenance and servicing? .
Base : Car owners

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

REPLACEMENT CAR WOULD BE THE STRONGEST ARGUMENT TO CHOOSE A GARAGE/DEALERSHIP FOR REPAIRS AND MAINTENANCE. CAR AND GARAGE CERTIFICATION ARE ALSO MOTIVATING.

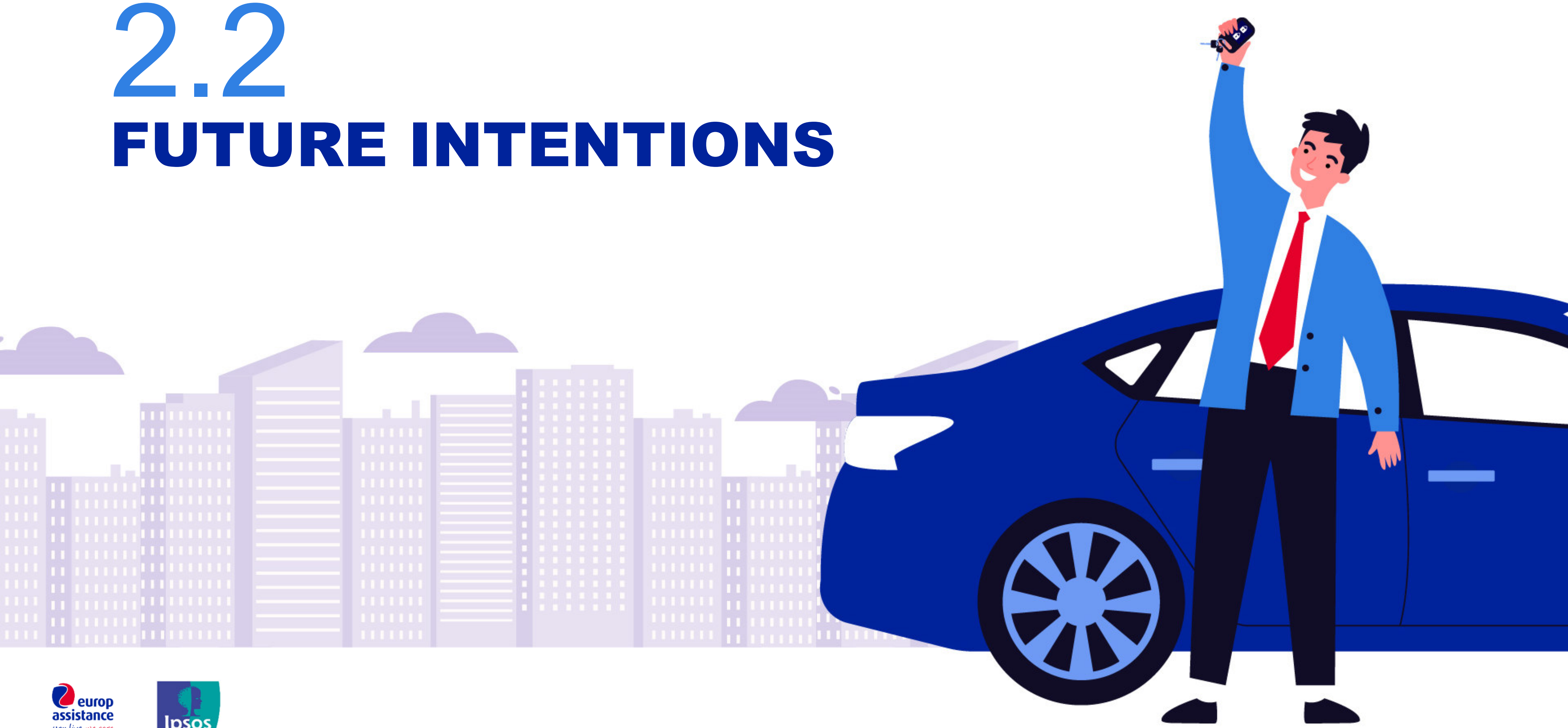
REASONS TO CHOOSE WS OR DEALERSHIP

	EUROPE						
Replacement car during repairs / maintenance	33% / 80%	27% / 75%	35% / 82%	28% / 71%	32% / 81%	38% / 84%	36% / 84%
Car certification to guarantee the car quality	24% / 75%	19% / 67%	21% / 70%	19% / 65%	23% / 78%	34% / 85%	27% / 80%
If this garage is certified by a motor assistance expert	24% / 75%	13 / 58%	20% / 68%	24% / 72%	22% / 79%	34% / 86%	26% / 81%
Extension of the duration of your roadside assistance coverage	22% / 69%	19% / 64%	19% / 64%	13 / 46%	22% / 76%	29% / 80%	26% / 77%
Pick-up & Delivery	25% / 68%	16% / 49%	23% / 67%	21% / 56%	26% / 75%	34% / 79%	28% / 75%

TOTAL YES – **Yes certainly**

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

2.2
FUTURE INTENTIONS



europ assistance
you live we care

Ipsos

EV SHOWS AN IMPORTANT DEVELOPMENT POTENTIAL, WITH ABOUT ONE THIRD OF EUROPEANS CONSIDERING IT.

INTENTIONS TO ACQUIRE

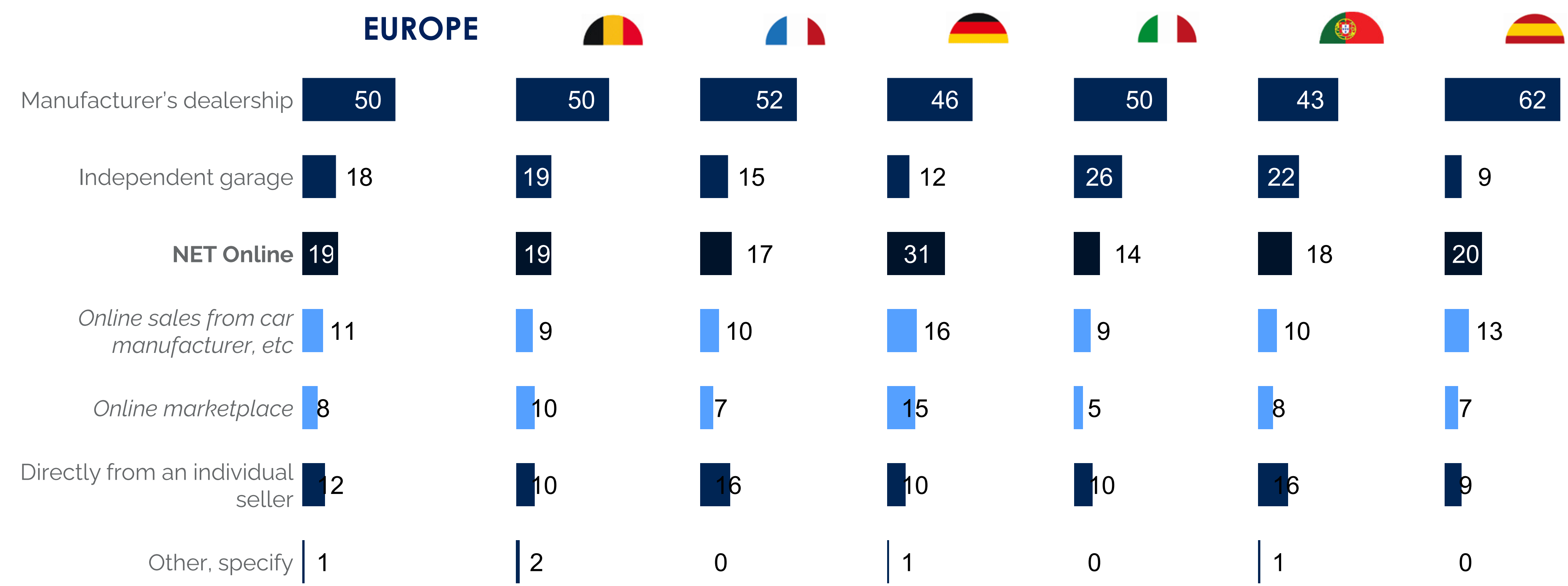
YES – **Yes certainly**

	EUROPE						
At least one car	12 / 37%	8 / 27%	12 / 37%	12 / 26%	13 / 45%	14 / 51%	13 / 39%
A least one new car	9 / 31%	6 / 22%	9 / 28%	10 / 22%	10 / 38%	12 / 43%	10 / 34%
At least one EV	9 / 31%	6 / 20%	9 / 27%	10 / 23%	11 / 39%	10 / 42%	10 / 35%
At least one second-hand car	8 / 28%	5 / 17%	8 / 29%	8 / 20%	9 / 33%	8 / 41%	8 / 28%
At least one thermic car	7 / 25%	5 / 17%	8 / 27%	8 / 17%	7 / 28%	9 / 35%	7 / 24%
At least one electric bicycle	5 / 21%	4 / 15%	5 / 20%	5 / 19%	5 / 28%	7 / 25%	4 / 19%

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

IN LINE WITH CHANNELS CURRENTLY USED, HALF OF RESPONDENTS INTEND TO ACQUIRE THEIR NEW CAR IN A MANUFACTURER'S DEALERSHIP. ONLINE CHANNELS ARE MORE CONSIDERED THAN TODAY FOR A FUTURE PURCHASE.

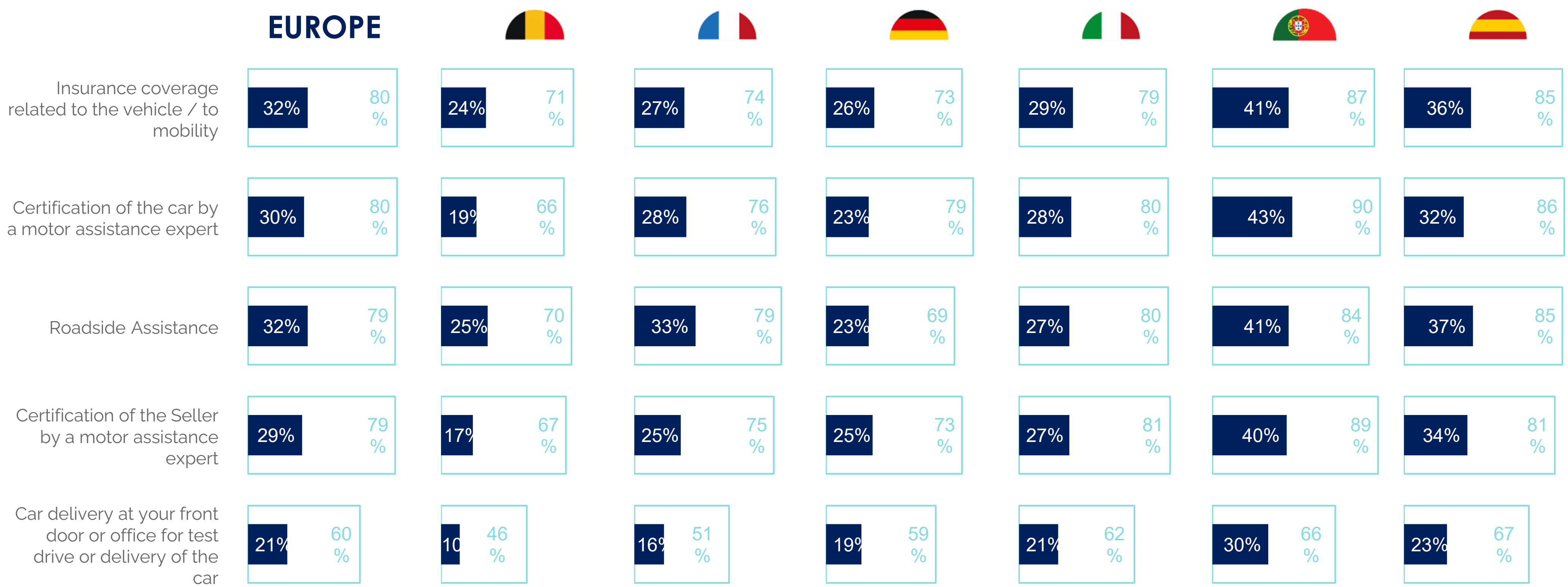
INTENDED PURCHASE CHANNEL %



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

EXCEPT CAR DELIVERY AT THE FRONT DOOR OR OFFICE, LESS IMPORTANT, ALL CRITERIAS APPEAR EQUALLY IMPORTANT WHEN SELECTING A SELLER

CRITERIAS FOR PURCHASE CHANNEL SELECTION

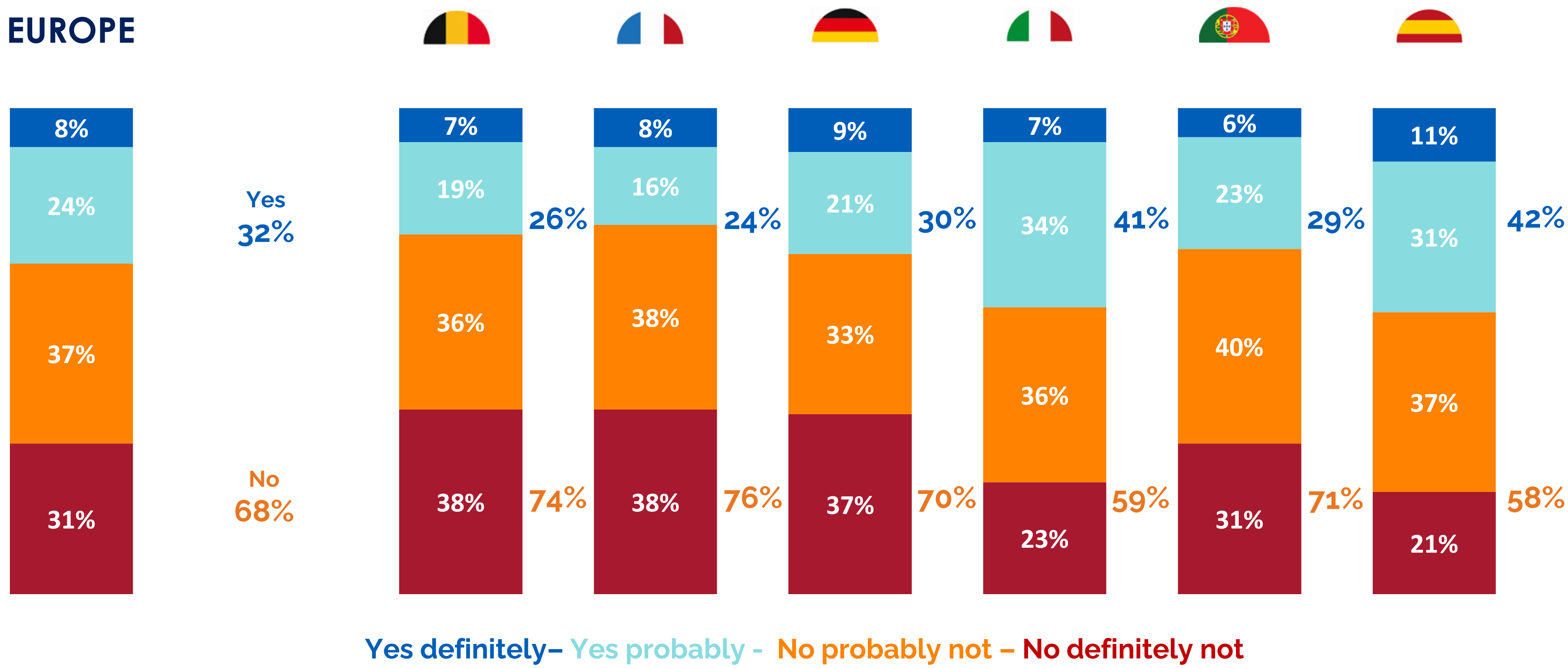


Q27 – How important are the following criteria when selecting a seller where you consider buying or leasing a car?
Base : Car owners

NET Important – **Very important**

BELGIANS AND FRENCH SHOW MORE RELUCTANCE TO GIVING UP PERSONAL CARS THAN SPANISH AND ITALIANS.

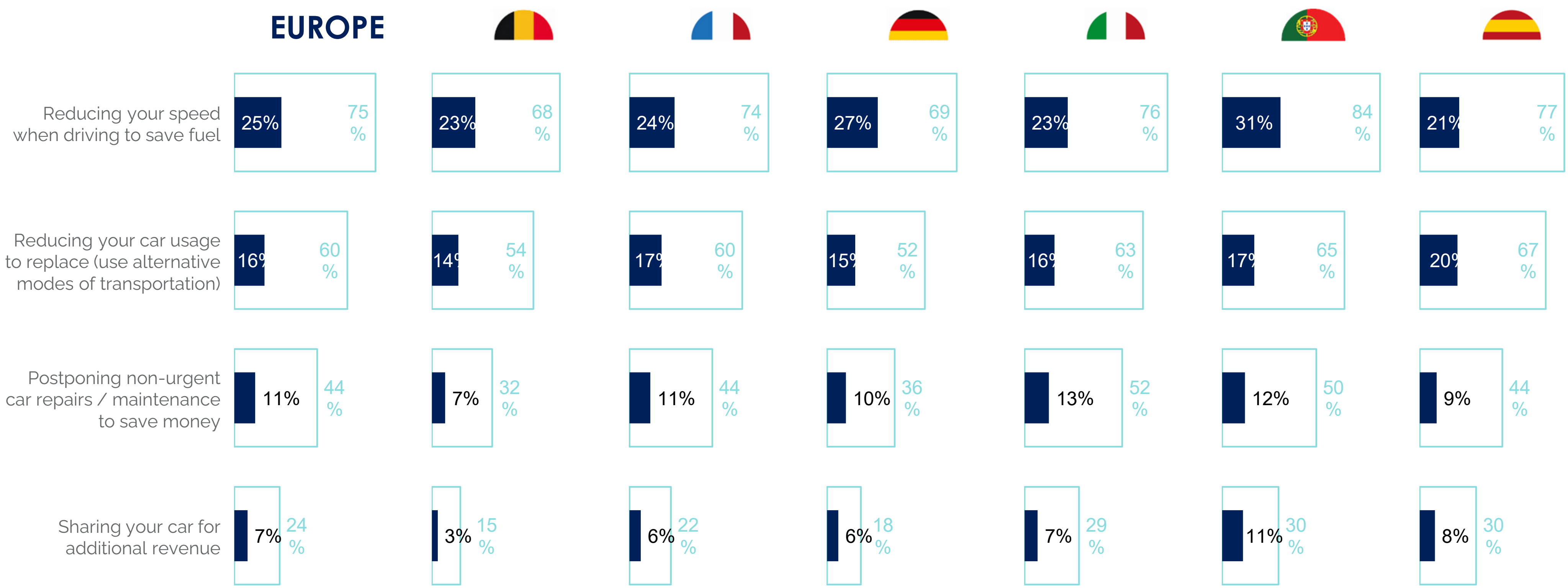
INTENT TO STOP HAVING A CAR



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

TO FACE THE CURRENT CONTEXT, THE MAIN CHANGES CONSIDERED ARE SPEED AND CAR USAGE REDUCTION.

CHANGES IN BEHAVIORS



Q31 – Among the following actions in response to the current context (energy crisis, inflation…), which ones could you consider doing in the next 6 months?
Base : Car owners

NET YES – Yes certainly

2.3
FOCUS EV

PURCHASE COST IS THE MAIN BARRIER TO BUY AN EV, FAR ABOVE CHARGING POINTS ISSUES OR FEAR OF DIFFICULTIES TO MAKE LONG-DISTANCE TRIPS.

BARRIERS TO EV

	EUROPE						
NET Cost	56	57	64	52	55	61	48
High purchase costs	52	54	61	48	47	54	45
I'm afraid of maintenance costs	18	12	17	15	23	27	16
NET Charging points	32	32	36	34	32	21	31
No possibility to install charging points at your home	25	25	26	31	22	17	25
No charging points at your office	14	14	20	11	16	7	14
Difficulty to make long-distance trips	30	30	41	25	25	26	31
I don't need a new car at the moment	50	55	39	58	46	50	52
Other, specify	9	11	11	13	4	4	9

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

CHARGING STATIONS MAPPING, EV ROADSIDE ASSISTANCE AND GARAGES MAPPING ARE THE SERVICES THAT COULD SUPPORT THE MOST EV USAGE.

ADDITIONAL SERVICES EV

	EUROPE						
#1	Charging stations mapping 60%	Charging stations mapping 62%	Wallbox at home assistance 67%	Charging stations mapping 70%	Charging stations mapping 64%	EV Roadside assistance 61%	EV Roadside assistance 66%
#2	EV Roadside assistance 54%	EV Roadside assistance 57%	EV Roadside assistance 50%	Wallbox at home assistance 62%	EV Roadside assistance 62%	Charging stations mapping 54%	Charging stations mapping 63%
#3	Mapping of garages 46%	Wallbox at home assistance 45%	Holiday Swap 50%	Mapping of garages 53%	Mapping of garages 55%	Mapping of garages 43%	Mapping of garages 57%

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

3.
MICRO MOBILITY

KEY INSIGHTS

- Bicycles have conquered Europeans : almost 2 out of 3 own at least one bike on their household, and 1 out 5 electric bikes. E-bikes are more widespread in Belgium and Germany than in other countries for now.

- Stand scooters keep installing themselves, with 17% of owners on average, split quite evenly between standard & electric scooters.

- Shared services, whether for bikes or stand scooters, are used by 1 out 5 micro-mobility users overall.

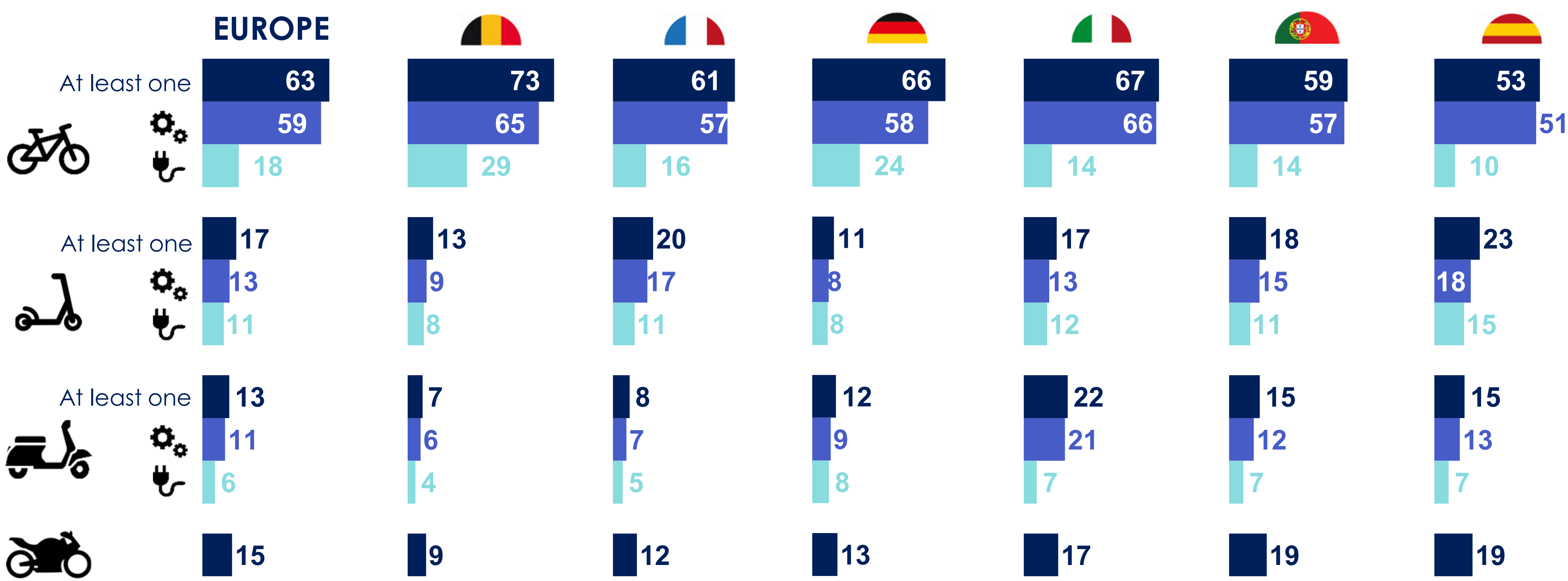
- A use that has been intensified since Covid : about one third of micro-mobility / bike users started using them regularly during or since the Covid crisis.

- Safety and coverage when riding bicycles and scooters is still heterogeneous : if two thirds of users usually wear helmets on bike/scooters, one third doesn't wear any protection, and only one third of users are sure to be covered by their insurance while using those vehicles, the other 2 thirds not sure or not covered

- Overall, more than 4 out of 10 Europeans could be interested by a person-based insurance when it comes to mobility.

ABOUT TWO THIRDS OF RESPONDENTS OWN AT LEAST ONE BIKE, MAINLY A STANDARD ONE. ELECTRIC BIKES ARE MUCH MORE COMMON ALREADY IN BELGIUM AND GERMANY.

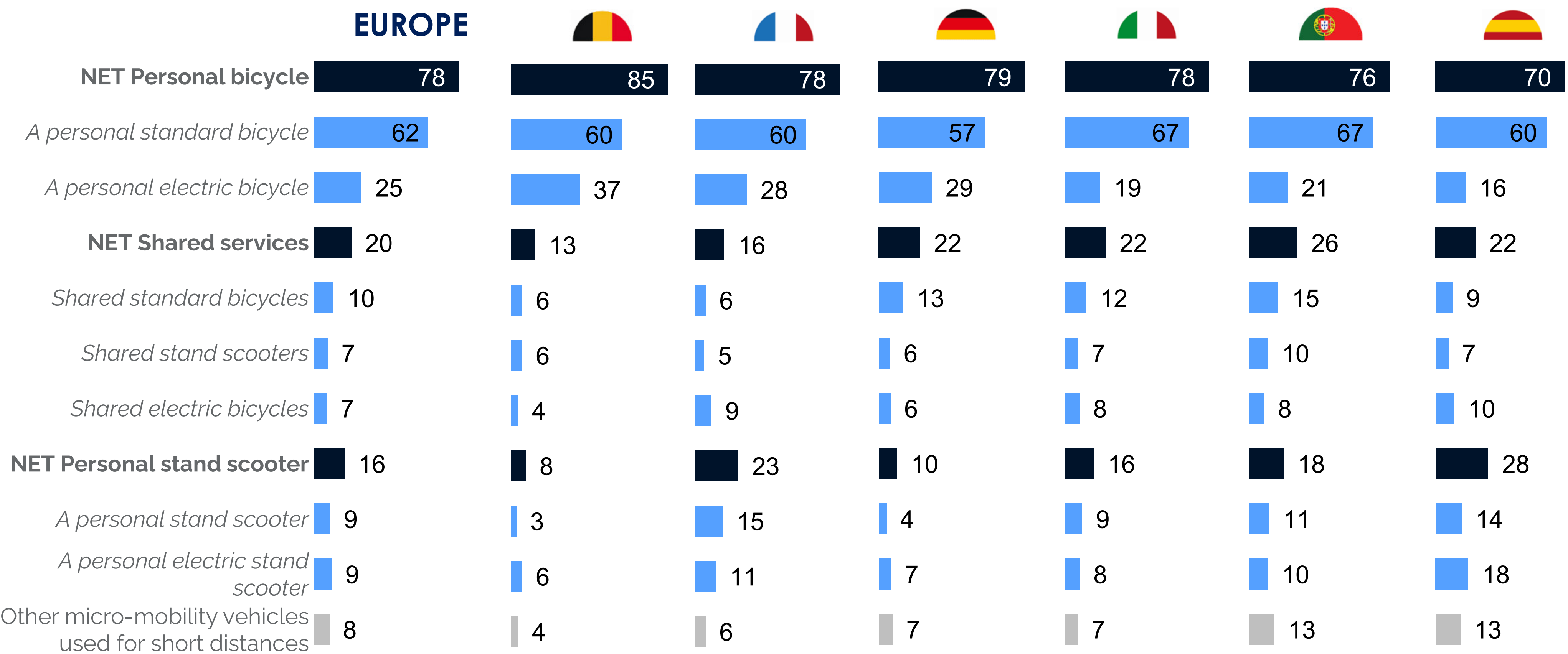
MOTORBIKES / BICYLES OWNED - AT LEAST ONE %



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

AMONG MICRO-MOBILITY USERS IN GENERAL, A REGULAR USE OF BICYCLES, WHILE SHARED SERVICES AND STAND SCOOTERS ARE EMERGING.

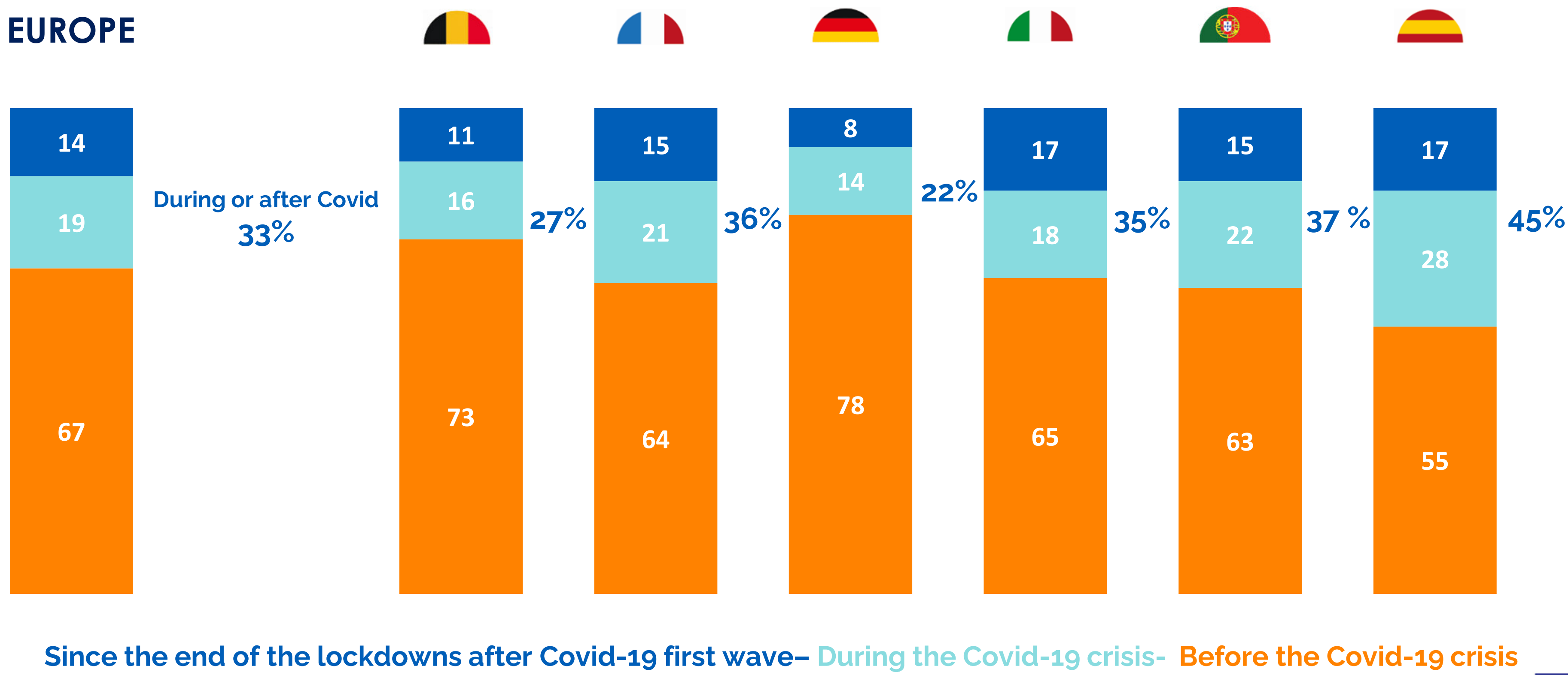
VEHICLES USAGE IN THE PAST 6 MONTHS %



Q32 – Which of the following vehicles have you personally used in the past 6 months?
Base : Micro-mobility or bicycles users

MICRO-MOBILITY VEHICLES AND BICYCLES USED HAS BEEN INTENSIFIED SINCE COVID AND LOCKDOWNS : ABOUT ONE THIRD OF “NEW REGULAR USERS”.

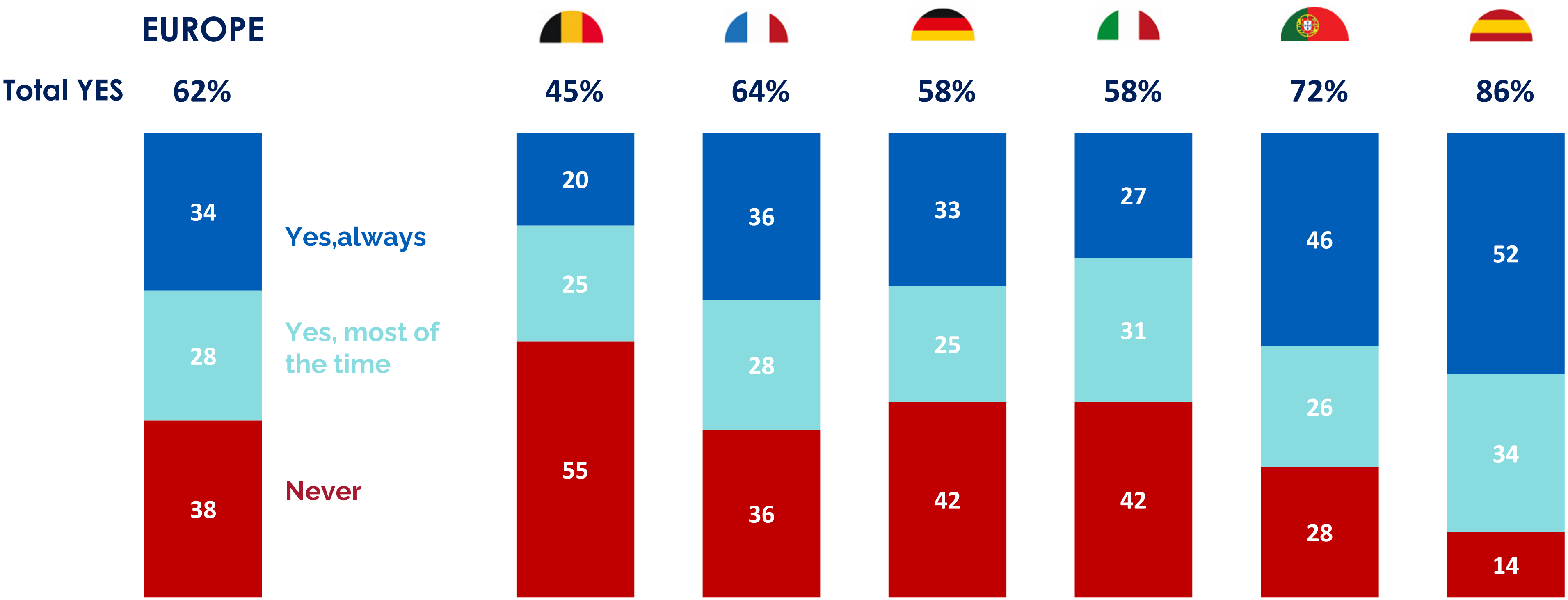
START USING MICRO MOBILITY - %



Q33 – When did you start using bicycles, scooters or other micro-mobility vehicles on a regular basis ?
Base : Micro-mobility or bicycles users

ALMOST TWO THIRDS OF USERS WEAR A HELMET WHEN DRIVING MICRO-MOBILITY VEHICLES OR BICYCLES. SPAIN'S AND PORTUGAL HIGHER USE COULD MAYBE BE LINKED TO LEGISLATION.

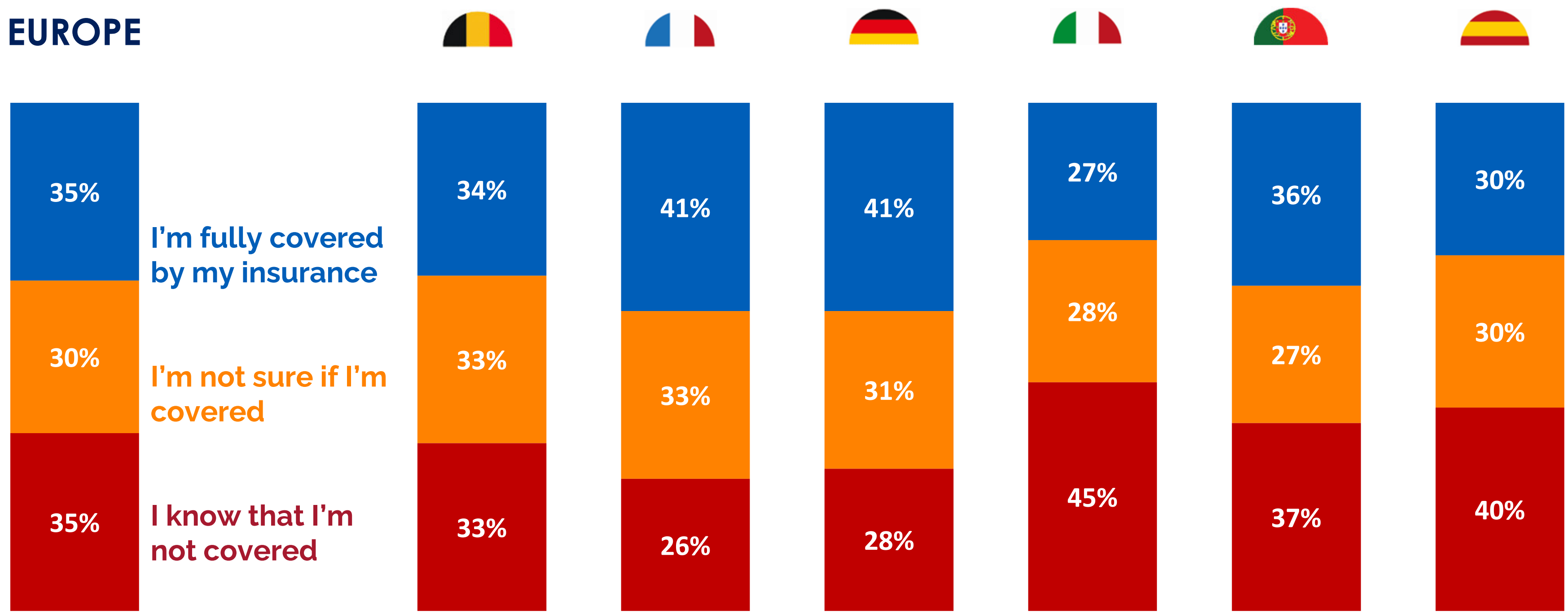
DRIVING HABITS – WEARING A HELMET - %



Q34 – When using bicycles, scooters or other micro-mobility vehicles, do you usually wear a helmet?
Base : Micro-mobility or bicycles users

ONLY 3 OUT OF 10 USERS ASSERT THEY HAVE FULL COVERAGE FOR THEIR BICYCLE OR SCOOTER.

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

BIKE OWNERS MAINLY MAINTAIN AND REPAIR THEIR BICYLES BY THEMSLEVES, ESPECIALLY IN FRANCE.

BICYCLES MAINTENANCE

The shop where the bicycle was bought

Place close to home

Do maintenance themselves

Maintenance channel	EUROPE						
#1	45%	40%	63%	42%	42%	44%	41%
#2	31%	33%	20%	31%	40%	31%	38%
#3	26%	28%	16%	31%	22%	23%	23%
Frequent maintenance	19%	11%	17%	16%	23%	25%	28%
Occasional maintenance	81%	89%	83%	84%	77%	75%	72%
Interest in maintenance contract	37%	35%	29%	34%	40%	48%	38%

Q35 – When going for the maintenance/repair of your bicycle, where do you actually go to? / Q36 - How often do you do maintenance / repairs for your bicycle? / Q37 - If a maintenance contract was proposed to you when buying your bicycle, would you consider subscribing it ?   Base : Bicycle owners

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

BICYCLE ASSISTANCE INTEREST %

	EUROPE						
At least one contract	56	48	44	51	65	65	62
An assistance	11	12	9	6	14	10	13
An insurance	24	19	21	30	23	26	25
Both	21	17	14	15	28	29	24
None	44	52	56	49	35	35	38

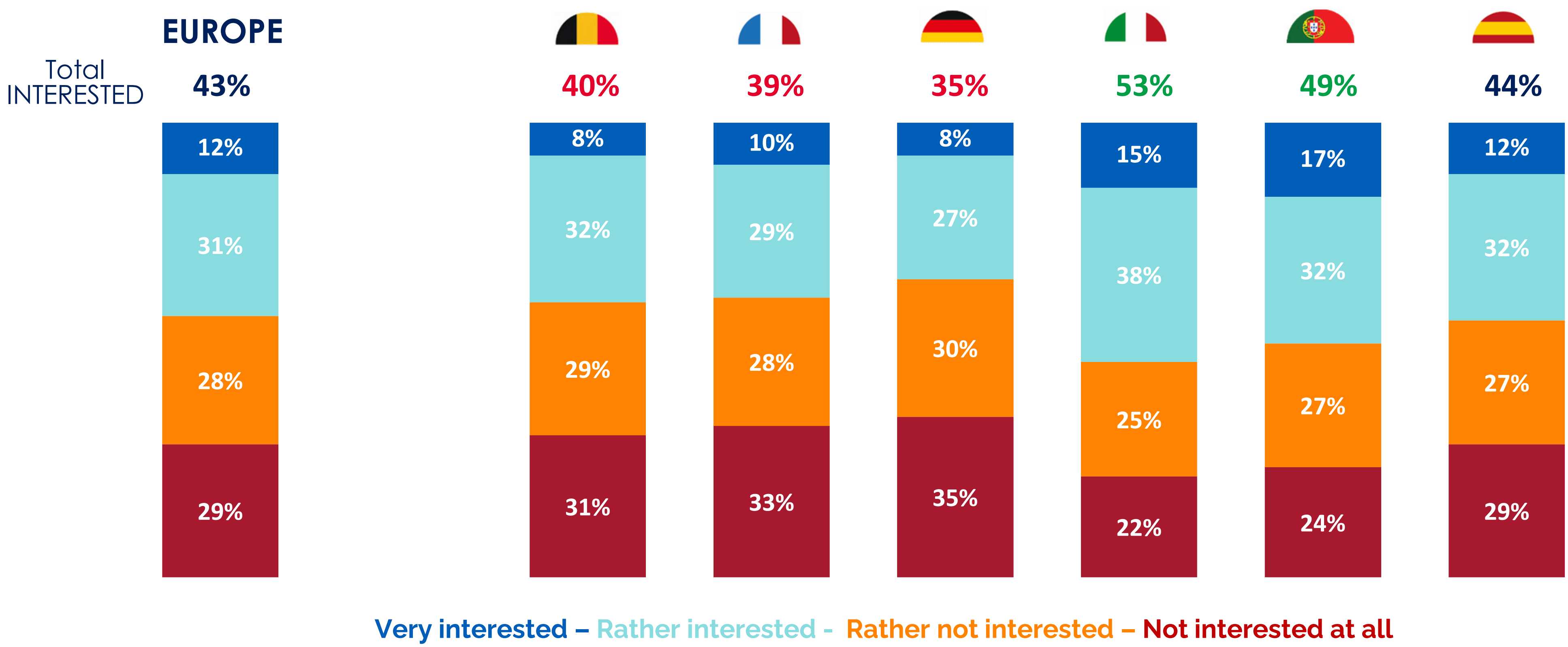
REASONS FOR INTEREST %

You want to be assisted in case of accident/breakdown	33	31	22	24	39	38	38
The price of your bicycle	28	28	36	33	27	23	23
The fact that it's a new one	20	23	20	23	19	19	17
You want a cover to restore your mobility if interrupted	18	17	21	20	15	19	21

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

MORE THAN 4 OUT OF 10 EUROPEANS WOULD BE INTERESTED BY A PERSON-BASED INSURANCE – HIGHER INTEREST IN ITALY AND PORTUGAL.

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

KEY INSIGHTS

- Choice criteria for a car insurance are primarily driven by price. Trust in insurance company comes far behind in second position.

- Services considered the most important when acquiring a car are the same as when choosing an insurance company :
  - Roadside assistance
  - Replacement car
  - Mobility services for driver and passengers in case of immobilization
  - Stolen vehicle tracking

- Person-based mobility assistance and pick-up & drop-off are the most differentiating services when selecting an insurance company

IMPORTANT DIFFERENCES IN INSURANCE BUDGET BETWEEN COUNTRIES. OVERALL, WHEN RESPONDENTS ANSWER MONTHLY, IT TENDS TO BE TWICE AS HIGH AS THE YEARLY EQUIVALENT.

YEARLY BUDGET CAR INSURANCE – AVERAGE

EUROPE

548 € per year

103 € per month

75 % answered per year

25% per month

735 € per year

120 € per month

571 € per year

81 € per month

613 € per year

97 € per month

575 € per year

128 € per month

368 € per year

93 € per month

490 € per year

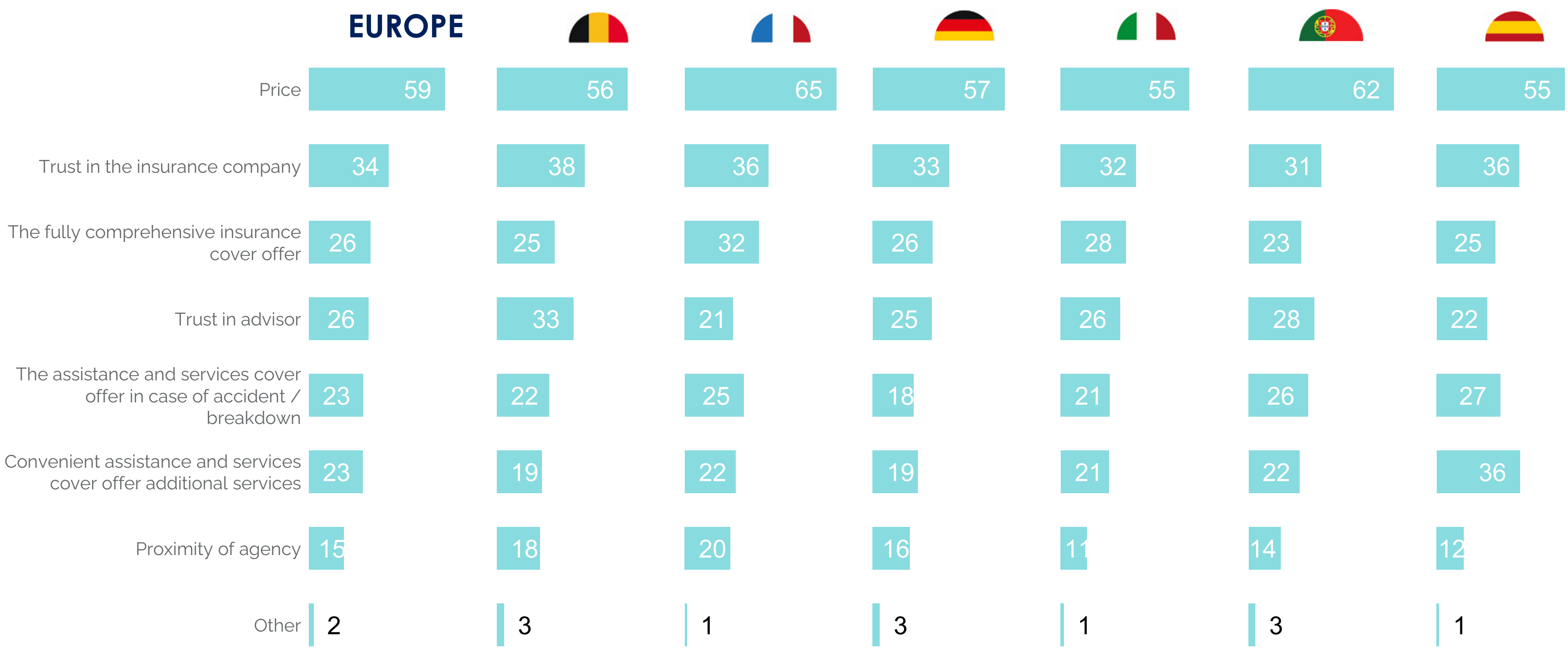
142 € per month

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

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

PRICE IS THE MOST IMPORTANT CRITERIA WHEN CHOSING A CAR INSURANCE COMPANY. TRUST COMES SECOND.

CAR INSURANCE CHOICE CRITERIAS %



Q42 – Among the following criteria, which ones were the most important when you chose the insurance company for this car ?
Base : Personal 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 %

	EUROPE						
Roadside assistance to your vehicle	87	85	86	78	87	91	92
Replacement car in case of breakdown, theft, accident	84	85	84	74	84	88	87
Stolen vehicle tracking	77	72	72	63	81	87	83
Mobility services for you and your passengers if your vehicle is immobilized	76	71	76	59	72	88	88
Tyre protection	74	68	70	57	74	83	85
Breakdown / emergency call	71	59	62	57	80	82	80
Steering to a preferred / agreed network of workshop for repairs	67	62	68	41	64	83	81
Car Pick-up & Delivery for maintenance / servicing	62	47	59	49	68	77	70
Pick-up & Delivery	57	40	50	50	62	69	69

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 %

	EUROPE						
Roadside assistance to your vehicle	85	82	86	72	86	91	92
Replacement car in case of breakdown, theft, accident	83	81	84	73	82	89	88
Mobility services for you and your passengers if your vehicle is immobilized	76	68	78	59	72	89	88
Stolen vehicle tracking	75	68	70	59	80	88	81
Tyre protection	71	63	67	56	73	82	83
Steering to a preferred / agreed network of workshop for repairs	69	62	69	46	68	82	82
Breakdown / emergency call	68	56	61	55	80	79	78
Car Pick-up & Delivery for maintenance / servicing	63	50	62	51	66	78	72
Pick-up & Delivery	57	40	53	47	61	70	71

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

OVERALL, A STRONG INTEREST FOR ROADSIDE ASSISTANCE…

RECAP - IMPORTANCE OF SERVICES – TOTAL IMPORTANT %

	EUROPE	Belgium	France	Germany
IN CAR ACQUISITION				
#1	Roadside Assistance 87%	Roadside Assistance 85%	Roadside Assistance 86%	Roadside Assistance 78%
#2	Replacement car 84%	Replacement car 85%	Replacement car 84%	Replacement car 74%
#3	Stolen vehicle tracking 77%	Stolen vehicle tracking 72%	Mobility services 76%	Stolen vehicle tracking 63%
IN CAR INSURANCE				
#1	Roadside Assistance 85%	Roadside Assistance 82%	Roadside Assistance 86%	Replacement car 73%
#2	Replacement car 83%	Replacement car 81%	Replacement car 84%	Roadside Assistance 72%
#3	Mobility services 76%	Stolen vehicle tracking 68%	Mobility services 78%	Stolen vehicle tracking 59%

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

…AND REPLACEMENT CAR SERVICE WHETHER IT IS WHEN CHOOSING THE CAR OR ITS INSURANCE

RECAP - IMPORTANCE OF SERVICES – TOTAL IMPORTANT %

	EUROPE	Italy	Portugal	Spain
IN CAR ACQUISITION				
#1	Roadside Assistance 87%	Roadside Assistance 87%	Roadside Assistance 91%	Roadside Assistance 92%
#2	Replacement car 84%	Replacement car 84%	Replacement car 88%	Mobility services 88%
#3	Stolen vehicle tracking 77%	Stolen vehicle tracking 81%	Mobility services 88%	Replacement car 87%
IN CAR INSURANCE				
#1	Roadside Assistance 85%	Roadside Assistance 86%	Roadside Assistance 91%	Roadside Assistance 92%
#2	Replacement car 83%	Replacement car 82%	Replacement car 89%	Replacement car 88%
#3	Mobility services 76%	Stolen vehicle tracking 80%	Mobility services 89%	Mobility services 88%

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*

PERSON-BASED MOBILITY ASSISTANCE AND PICK-UP & DROP-OFF ARE THE MOST DIFFERENTIATING SERVICES WHEN SELECTING AN INSURANCE COMPANY.

CRITERIA CHOOSING INSURANCE COMPANY – MAKE THE DIFFERENCE %

	EUROPE						
A person-based mobility assistance	30	23	29	16	29	42	39
Pick-up & drop-off	29	19	30	21	27	44	33
Access to a selected network of garages	24	16	27	13	21	37	32
Digital access to the roadside assistance services	20	12	19	13	19	32	25
Access to safety and maintenance tips	17	9	16	13	18	23	24
Teleconsultation with a medical professional	16	10	12	12	18	24	21
Concierge services	12	7	10	8	14	19	15

Q47 – Would the following services make the difference for you when selecting a motor insurance company over another one?
Base : Car Owners

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

5.
ASSISTANCE SERVICES

KEY INSIGHTS

- Phone is by far the preferred contact channel to assistance services, way ahead digital channels.
- Roadside assistance, replacement car, change of battery on spot and mobility services are the most important assistance services from a roadside assistance cover.
- Pick-up & delivery service preferred use case is for repairs/maintenance by a workshop or garage. Overall, almost half of respondents would be willing to pay for such a service.
- A Europ Assistance car certification would reinforce trust and willingness to buy for more than half of respondents.

OVERALL, 4 OUT OF 10 RESPONDENTS DECLARE HAVING ALREADY EXPERIENCED ROADSIDE ASSISTANCE.

ROADSIDE ASSISTANCE EXPERIENCE

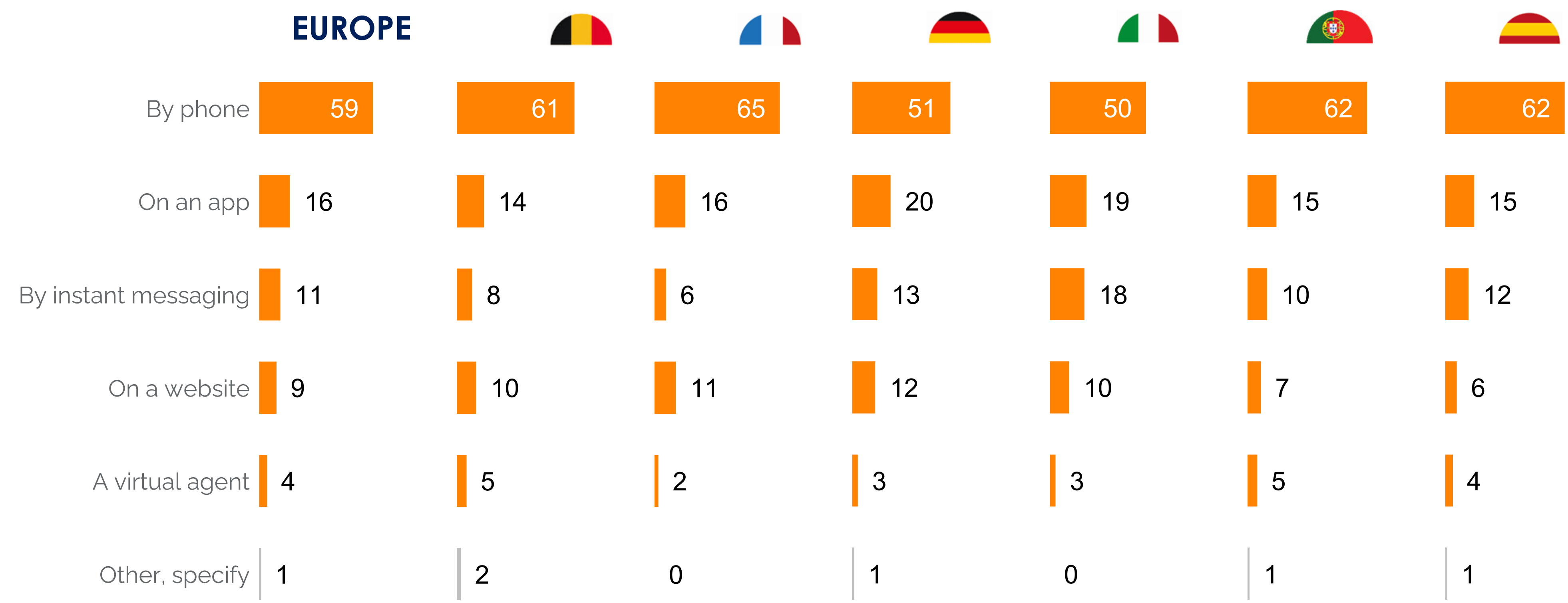
	EUROPE						
Already experienced roadside assistance	42%	42%	43%	41%	31%	53%	40%

Q43 – Have you already experienced roadside assistance?
Base : Car owners

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

PHONE IS THE PREFERED CHANNEL TO ACCESS TO ROADSIDE ASSISTANCE, FAR AHEAD OTHER CHANNELS

CHANNEL ACCESS TO ASSISTANCE SERVICES – PREFER %



Q48 – Which access to roadside assistance services among the following would you prefer?
Base : Car owners

ROADSIDE ASSISTANCE AND REPLACEMENT CAR ARE THE MOST VALUED SERVICES

IMPORTANCE OF ASSISTANCE SERVICES – TOTAL IMPORTANT %

	EUROPE						
Roadside assistance to your vehicle	88	85	87	79	86	92	92
Replacement car	84	85	87	72	81	90	87
Change of battery on spot	80	79	77	69	79	86	85
Mobility services for you and your passengers if your vehicle is immobilized	77	73	80	60	72	88	89
Over the phone resolution / car problem fixing	76	71	75	62	78	86	78
Access to garages which quality is certified	73	67	75	60	69	83	82
Tyre protection	72	67	66	60	73	85	83
Car minor repairs or maintenance at home or workplace	68	59	60	58	69	82	75
Car Drop-off	64	51	63	52	68	77	73
Possibility to upgrade roadside assistance benefits at your own cost	59	45	58	44	55	73	74
Access to financing solutions for vehicle repairs	59	47	57	43	60	73	70
Access to financing solutions for a new vehicle acquisition	58	47	56	43	61	71	70
Access to commercial offers for vehicle acquisitions	52	39	49	38	58	64	63

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

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	39	38	39	28	34	46	46
Replacement car	39	36	46	26	31	50	42
Change of battery on spot	28	26	27	19	27	34	34
Mobility services for you and your passengers if your vehicle is immobilized	29	23	30	17	23	42	39
Over the phone resolution / car problem fixing	23	18	22	13	23	32	26
Access to garages which quality is certified	22	17	25	16	19	29	27
Tyre protection	22	18	18	14	21	32	31
Car minor repairs or maintenance at home or workplace	19	13	16	12	19	27	25
Car Drop-off	21	11	22	12	21	32	27
Possibility to upgrade roadside assistance benefits at your own cost	16	8	16	10	13	23	25
Access to financing solutions for vehicle repairs	16	8	13	10	15	27	21
Access to financing solutions for a new vehicle acquisition	16	10	16	10	16	25	21
Access to commercial offers for vehicle acquisitions	13	8	12	8	13	21	18

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

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

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	69	59	63	58	72	77	79
Take delivery of your vehicle at your doorstep	58	44	56	44	61	70	66
Sell your vehicle, picking the vehicle from your doorstep and deliver it to the buyer	52	41	47	41	56	61	60
Test drive a vehicle at your doorstep	50	39	46	42	51	59	58

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

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

INTEREST IN PICK UP AND DELIVERY SERVICES – VERY INTERESTED %

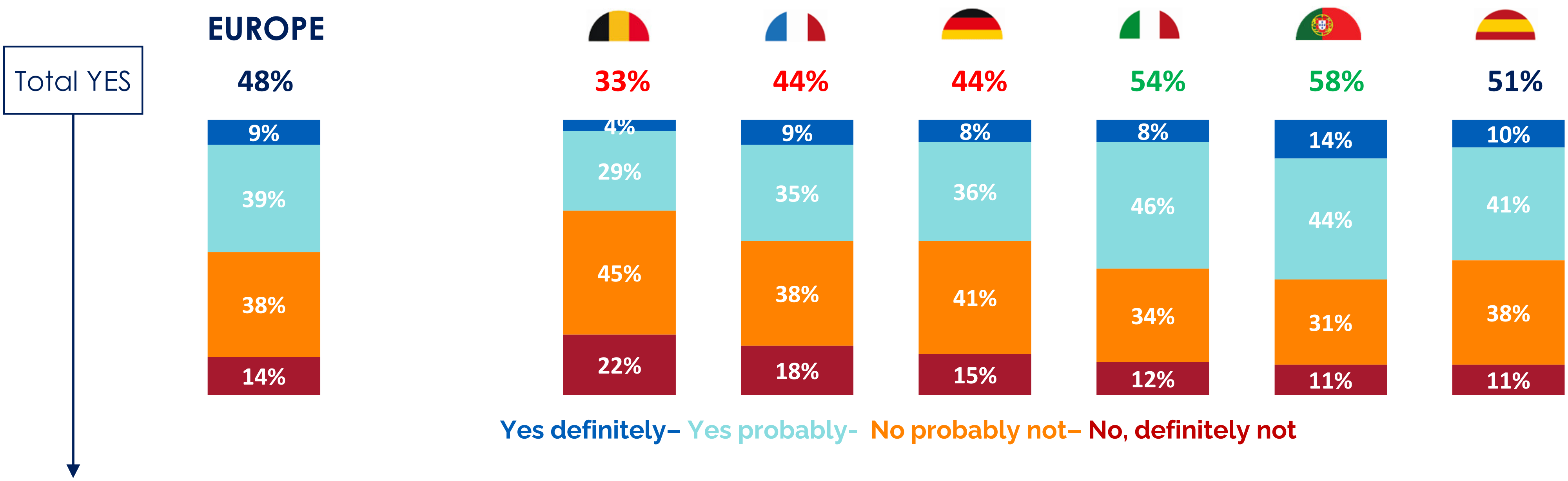
	EUROPE						
Have your vehicle repaired, maintained or serviced by a WS / garage	22	13	19	15	24	31	27
Take delivery of your vehicle at your doorstep	17	8	17	12	16	26	20
Sell your vehicle, picking the vehicle from your doorstep and deliver it to the buyer	15	8	13	10	15	23	19
Test drive a vehicle at your doorstep	14	8	13	10	12	20	17

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

HALF OF RESPONDENTS WOULD BE WILLING TO PAY FOR SUCH A SERVICE. BELGIANS, FRENCH AND GERMANS, WHO ARE THE LEAST INTERESTED BY THE SERVICE, ARE ALSO LEAST WILLING TO PAY.

PICK UP AND DELIVERY WILLINGNESS TO PAY



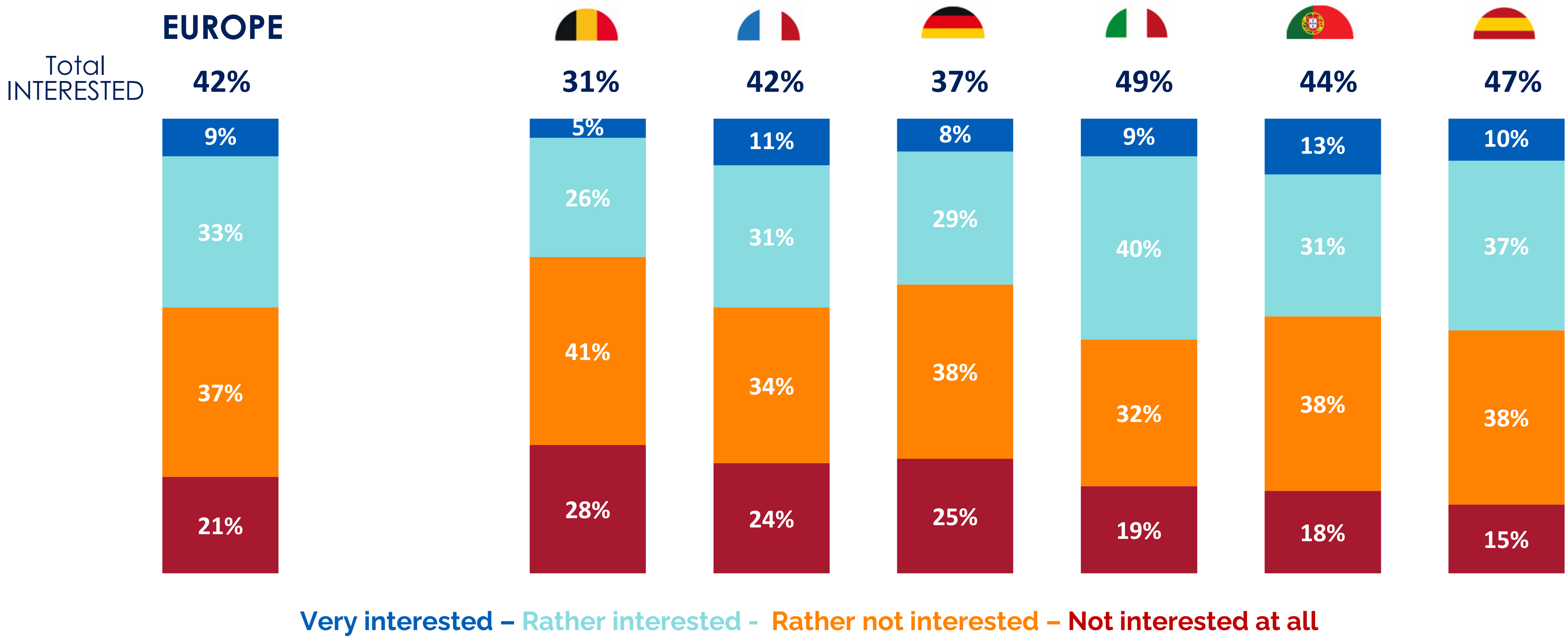
	Europe	Belgium	France	Germany	Italy	Portugal	Spain
Average price per year (67% of answers)	165€	193€	139€	227€	205€	120€	144€
Average price per use (33% of answers)	63€	77€	60€	54€	80€	58€	59€

Q51 - Would you be willing to pay more (in your car acquisition or your motor insurance) for this Pick-up and delivery service ? / Q52 - How much would you be willing to pay for this Pick-up and Delivery service?
Base : Interested in at least one use of pick up and delivery services / Willing to pay

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

4 OUT OF 10 RESPONDENTS WOULD BE INTERESTED BY THE POSSIBILITY TO GET A MOBILITY BUDGET INSTEAD OF A REPLACEMENT CAR IN CASE OF CAR IMMOBILIZATION.

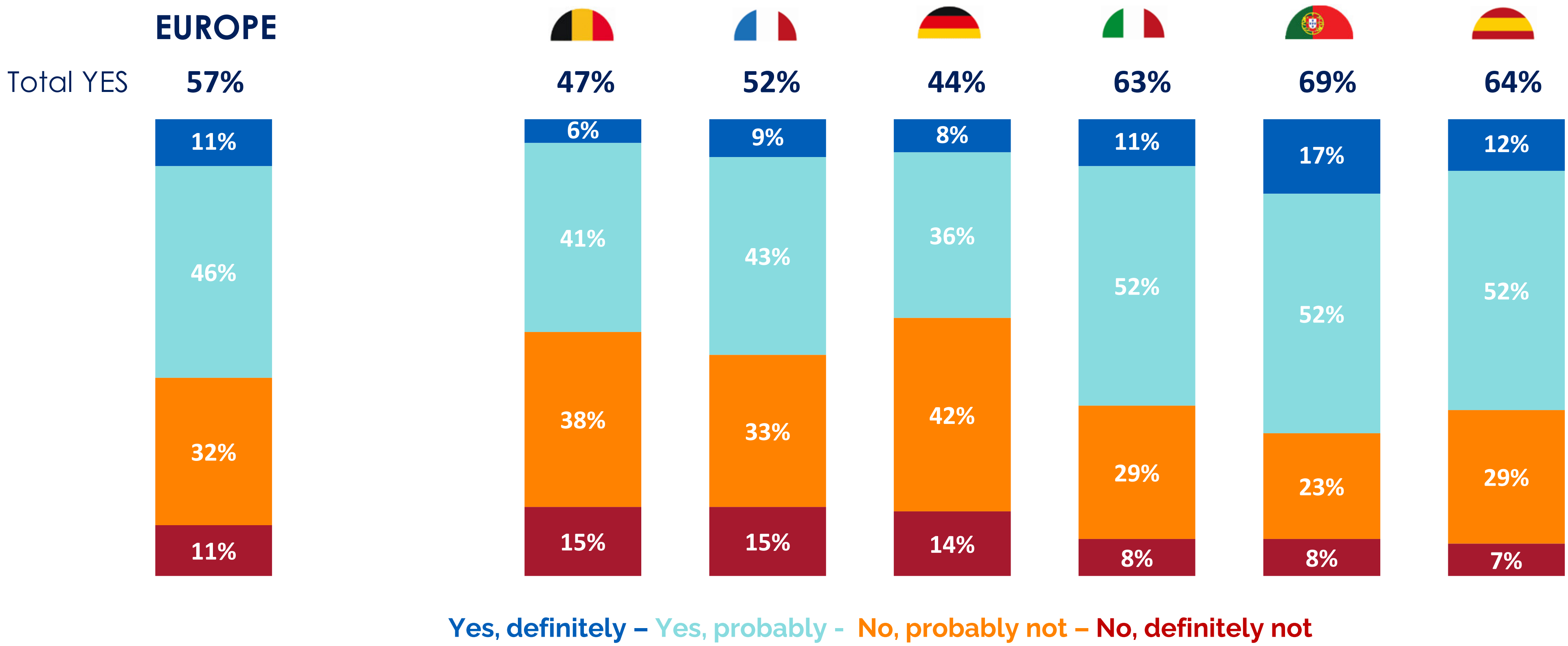
INTEREST FOR ALTERNATIVE MOBILITY SOLUTIONS (CAR OWNERS)



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

A EUROP ASSISTANCE CERTIFICATION WOULD BE A SIGNIFICANT TRIGGER OF PREFERENCE WHEN BUYING A CAR FOR 6 OUT OF 10 RESPONDENTS.

INTEREST FOR EUROP ASSISTANCE CERTIFICATION



Q54 – Would you rather buy a car if the car is certified by Europ Assistance, a motor assistance expert?
Base : Car owners

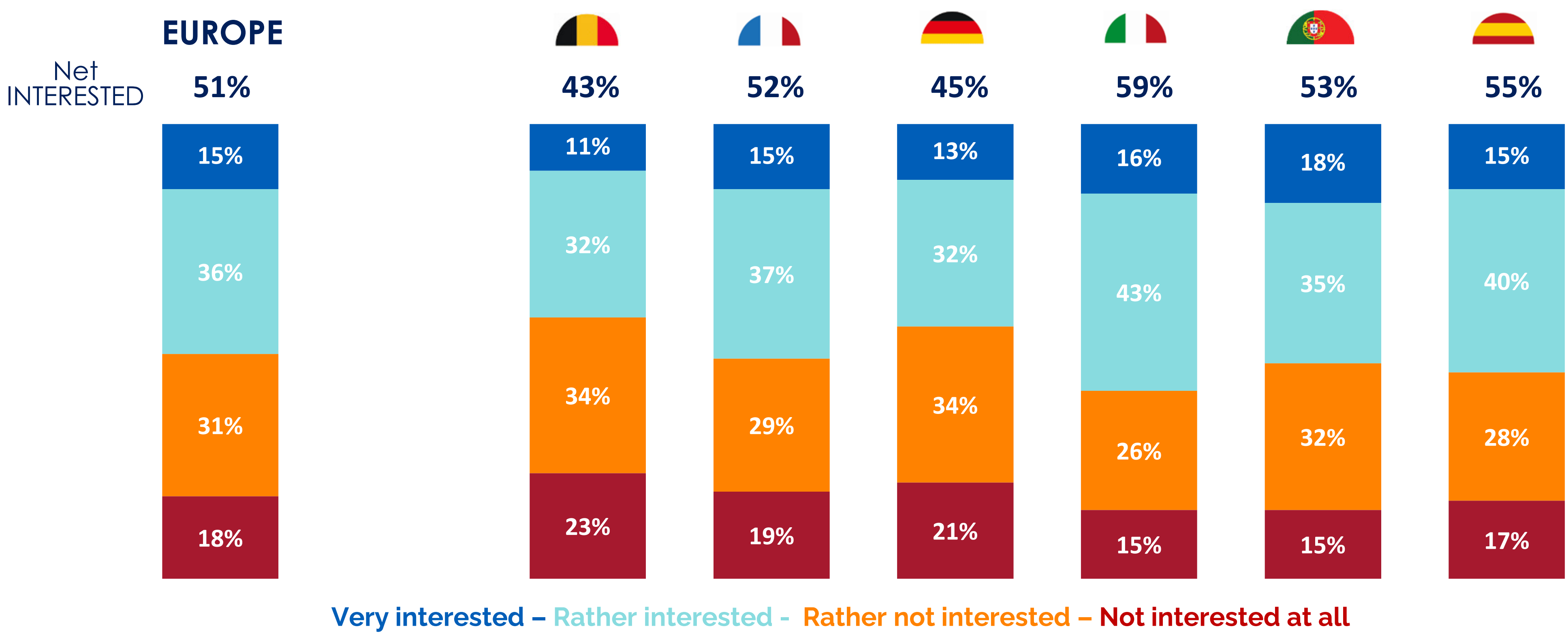
6.
ATTITUDES

KEY INSIGHTS

- Half of employed Europeans would be interested by a mobility budget provided by their company.
- Even if Europeans are aware that environment needs to be a priority and efforts be done to change habits, evolutions at a personal level depend on individual perceptions : only a small proportion really feel bad about using cars, the impact of EV vs thermic vehicles on environment is not obvious…
- …and changes in mobility habits have also been caused by other factors than environment, such as Covid or inflation.

HALF OF WORKERS WOULD BE INTERESTED BY A MOBILITY BUDGET

INTEREST FOR ALTERNATIVE MOBILITY SOLUTIONS (WORKERS)



Q55 – Would you be interested by a mobility budget that would be provided by your company?
A mobility budget is a digital wallet and platform to access multiple mobility and transportation means (including car sharing, micro-mobility, public transportation, taxi & ride-hailing…)
Base : Workers

A PROGRESSIVE AWARENESS ON ENVIRONMENT : EUROPEANS CLAIM TO PAY ATTENTION TO THE IMPACT OF THEIR DRIVING HABITS, BUT DON'T FEEL GUILTY OF USING A CAR : CHANGES IN DAILY HABITS WILL TAKE SOME TIME….

ATTITUDES – NET AGREE %

	EUROPE						
ENVIRONMENTAL ATTITUDES							
Environmental questions must be a priority for governments	80	70	78	75	81	92	83
I pay attention to the impact my driving habits have on the environment	77	69	75	70	80	87	78
It is a good thing to impose restrictive regulations so that cars become less polluting	74	66	67	67	79	89	76
I have already changed my daily mobility habits to be greener	64	55	60	62	68	72	70
Electric Vehicles are better for the environment than thermic vehicles	62	48	46	51	71	83	73
I feel bad about the ecological footprint linked to the usage of my car	54	40	39	38	60	75	75
ATTITUDES TOWARD CURRENT CONTEXT							
New ways of working must be supported by new mobility alternatives	79	74	77	69	83	91	82
I had to review my mobility habits due to inflation and fuel costs	64	49	63	50	73	82	69
Covid has changed my way of thinking about mobility	50	36	45	36	58	66	59

Q56 & Q57 - How much do you agree or disagree with the following statements?
Base : All

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

…AND ARE ALSO LINKED TO OTHER FACTORS THAN ENVIRONMENTAL CONCERNS : COVID, INFLATION, FUEL COSTS

ATTITUDES – STRONGLY AGREE %

	EUROPE						
ENVIRONMENTAL ATTITUDES							
Environmental questions must be a priority for governments	35	20	27	32	42	52	39
I pay attention to the impact my driving habits have on the environment	26	16	22	24	28	33	29
It is a good thing to impose restrictive regulations so that cars become less polluting	26	15	18	21	34	40	29
I have already changed my daily mobility habits to be greener	21	14	16	21	24	25	27
Electric Vehicles are better for the environment than thermic vehicles	19	9	10	12	23	34	26
I feel bad about the ecological footprint linked to the usage of my car	15	6	10	9	18	22	28
ATTITUDES TOWARD CURRENT CONTEXT							
New ways of working must be supported by new mobility alternatives	24	15	18	16	29	38	28
I had to review my mobility habits due to inflation and fuel costs	21	11	18	15	25	32	25
Covid has changed my way of thinking about mobility	14	5	11	9	17	23	17

Q56 & Q57 - How much do you agree or disagree with the following statements?
Base : All

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

APPENDICES

OUR COMMITMENT

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- 3 years upon each wave completion of a Continuous Study.

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- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards

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You act better when you are sure.