2025

MOBILITY BAROMETER

among Europeans

SCOPE OF THE SURVEY

9 countries

1 000 interviews per country

Switzerland added this year to the barometer

9 000 interviews

Details 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 17th, 2024 - January 13th, 2025

METHOD OF DATA COLLECTION

Online survey in the 9 countries

Pascal Baumgarten
CEO, Europ Assistance Northern Europe & Mobility

“Mobility in Europe is evolving, shaped by economic constraints, regulatory changes, and growing environmental concerns. While personal cars remain central to daily life, their role is gradually shifting as Europeans explore alternative mobility solutions. The 2025 Mobility Barometer by Europ Assistance, conducted with IPSOS, reveals a landscape in transition, where cost considerations and convenience increasingly drive choices.

Although internal combustion engine (ICE) vehicles still dominate, hybrid and electric models continue to gain ground in specific markets. However, electric vehicle (EV) adoption shows signs of plateauing, with purchase costs and charging infrastructure remaining major concerns for consumers. Between economic realities and environmental aspirations, the mobility sector must fully play its part in addressing the impact of high-carbon transportation while supporting consumers in this transition.

Beyond cars, the report highlights the rise of multimodal and soft mobility solutions. Walking, cycling, and public transport are becoming more integrated into daily mobility habits, offering practical and cost-effective alternatives. More than half of European cyclists are now considering insurance and assistance services, reflecting the growing importance of bicycles and micromobility. Economic factors remain the main driver of these changes: whether opting for public transport, considering an EV, or embracing shared mobility, the primary motivation remains cost savings.

This shift also reflects a changing mindset regarding car ownership. In 2025, one in three European car owners is open to giving up their personal vehicle in favor of more flexible alternatives. This evolution calls for innovative services that enable smoother transitions between different modes of transport. Europ Assistance is responding with new solutions, such as trip-continuation services that provide users with a virtual card and mobility budget, allowing them to seamlessly switch to alternative transportation options when needed. The mobility sector must no longer treat different transportation methods in silos but instead focus on creating a seamless multimodal experience for travelers.

By analyzing these trends, the 2025 Mobility Barometer highlights both the challenges and opportunities shaping the future of mobility in Europe. The transition to more sustainable and flexible mobility is underway—not as a sudden revolution, but as a steady and pragmatic evolution that responds to the needs and constraints of European consumers.”


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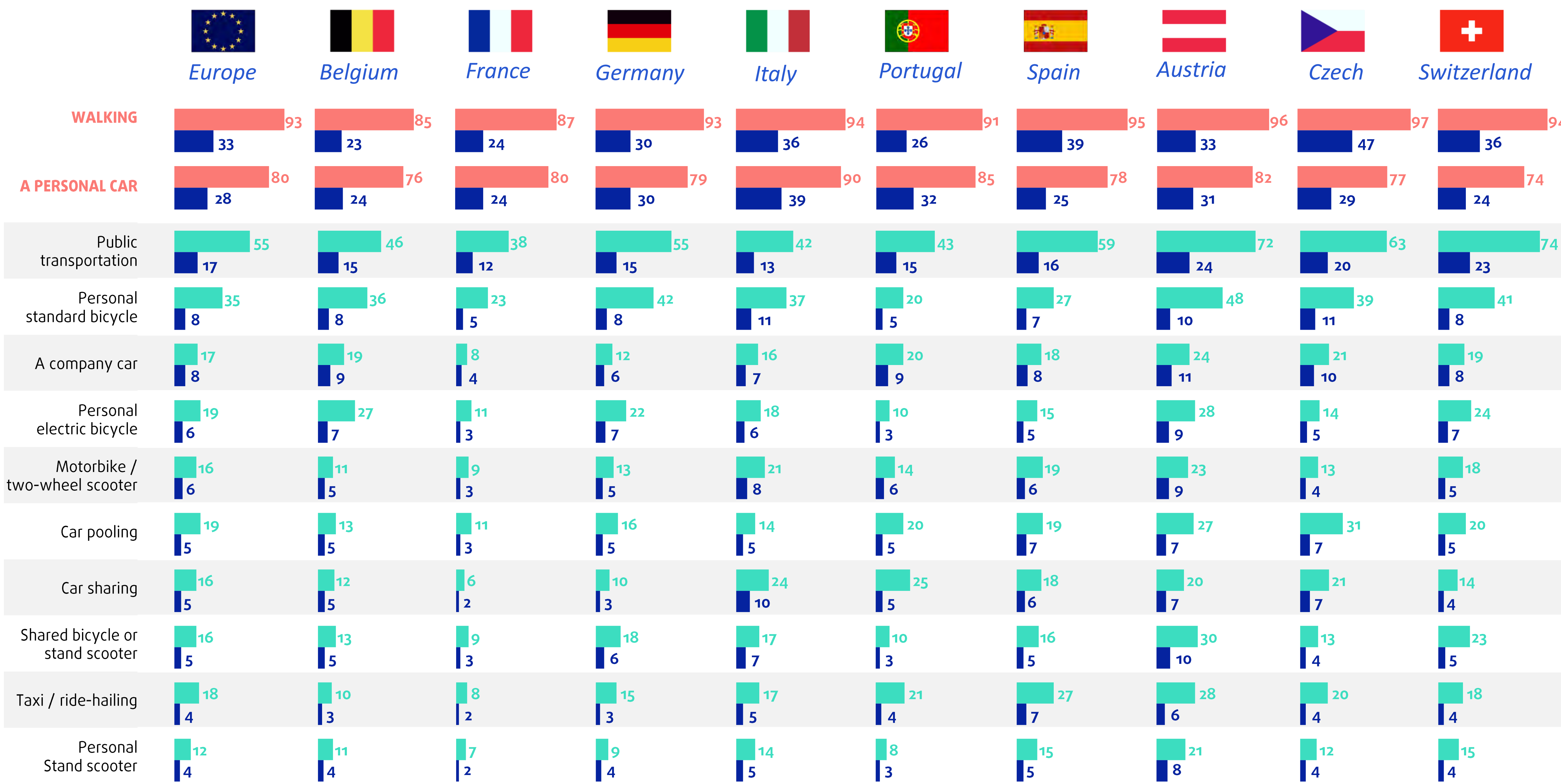
MOBILITY HABITS IN EUROPE

Current Mobility Habits

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?

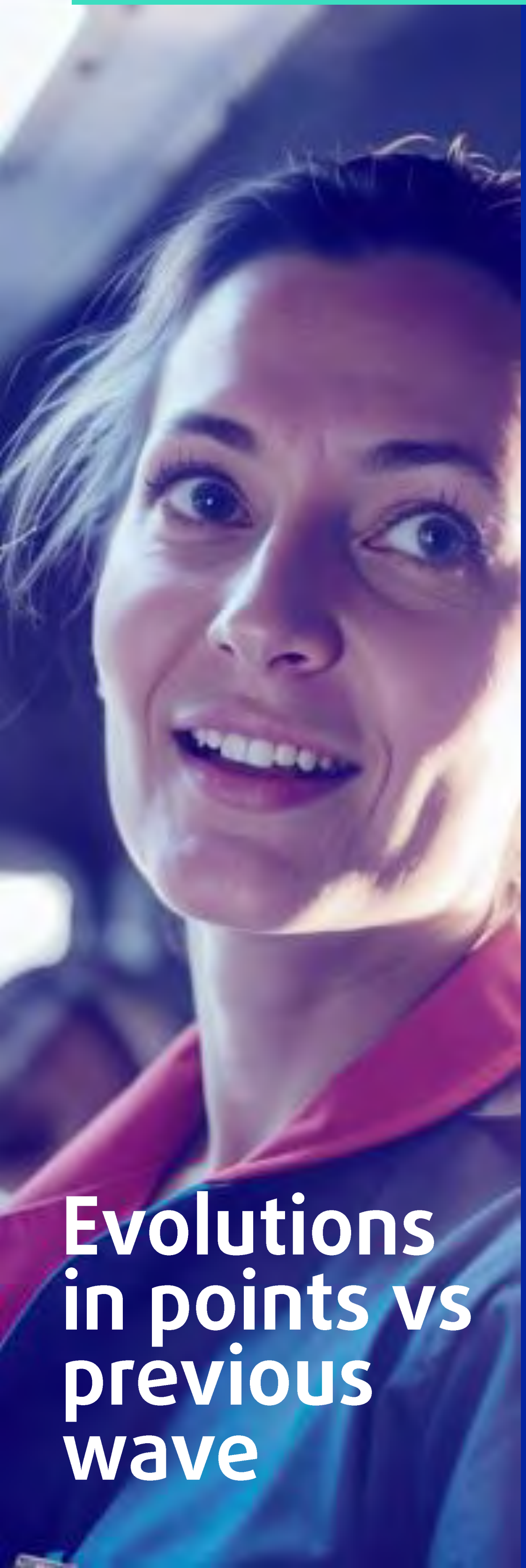
Base: All

Walking and personal car remain the most widespread modes of transportation on weekdays, public transportation is also important in Switzerland



	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
WALKING	93 / 33	85 / 23	87 / 24	93 / 30	94 / 36	91 / 26	95 / 39	96 / 33	97 / 47	94 / 36
A PERSONAL CAR	80 / 28	76 / 24	80 / 24	79 / 30	90 / 39	85 / 32	78 / 25	82 / 31	77 / 29	74 / 24
Public transportation	55 / 17	46 / 15	38 / 12	55 / 15	42 / 13	43 / 15	59 / 16	72 / 24	63 / 20	74 / 23
Personal standard bicycle	35 / 8	36 / 8	23 / 5	42 / 8	37 / 11	20 / 5	27 / 7	48 / 10	39 / 11	41 / 8
A company car	17 / 8	19 / 9	8 / 4	12 / 6	16 / 7	20 / 9	18 / 8	24 / 11	21 / 10	19 / 8
Personal electric bicycle	19 / 6	27 / 7	11 / 3	22 / 7	18 / 6	10 / 3	15 / 5	28 / 9	14 / 5	24 / 7
Motorbike / two-wheel scooter	16 / 6	11 / 5	9 / 3	13 / 5	21 / 8	14 / 6	19 / 6	23 / 9	13 / 4	18 / 5
Car pooling	19 / 5	13 / 5	11 / 3	16 / 5	14 / 5	20 / 5	19 / 7	27 / 7	31 / 7	20 / 5
Car sharing	16 / 5	12 / 5	6 / 2	10 / 3	24 / 10	25 / 5	18 / 6	20 / 7	21 / 7	14 / 4
Shared bicycle or stand scooter	16 / 5	13 / 5	9 / 3	18 / 6	17 / 7	10 / 3	16 / 5	30 / 10	13 / 4	23 / 5
Taxi / ride-hailing	18 / 4	10 / 3	8 / 2	15 / 3	17 / 5	21 / 4	27 / 7	28 / 6	20 / 4	18 / 4
Personal Stand scooter	12 / 4	11 / 4	7 / 2	9 / 4	14 / 5	8 / 3	15 / 5	21 / 8	12 / 4	15 / 4

Total used | More than 1 hour a day | Total used, most widespread



Evolutions in points vs previous wave

« Main modes of transportation on weekdays **are quite stable in Europe** »

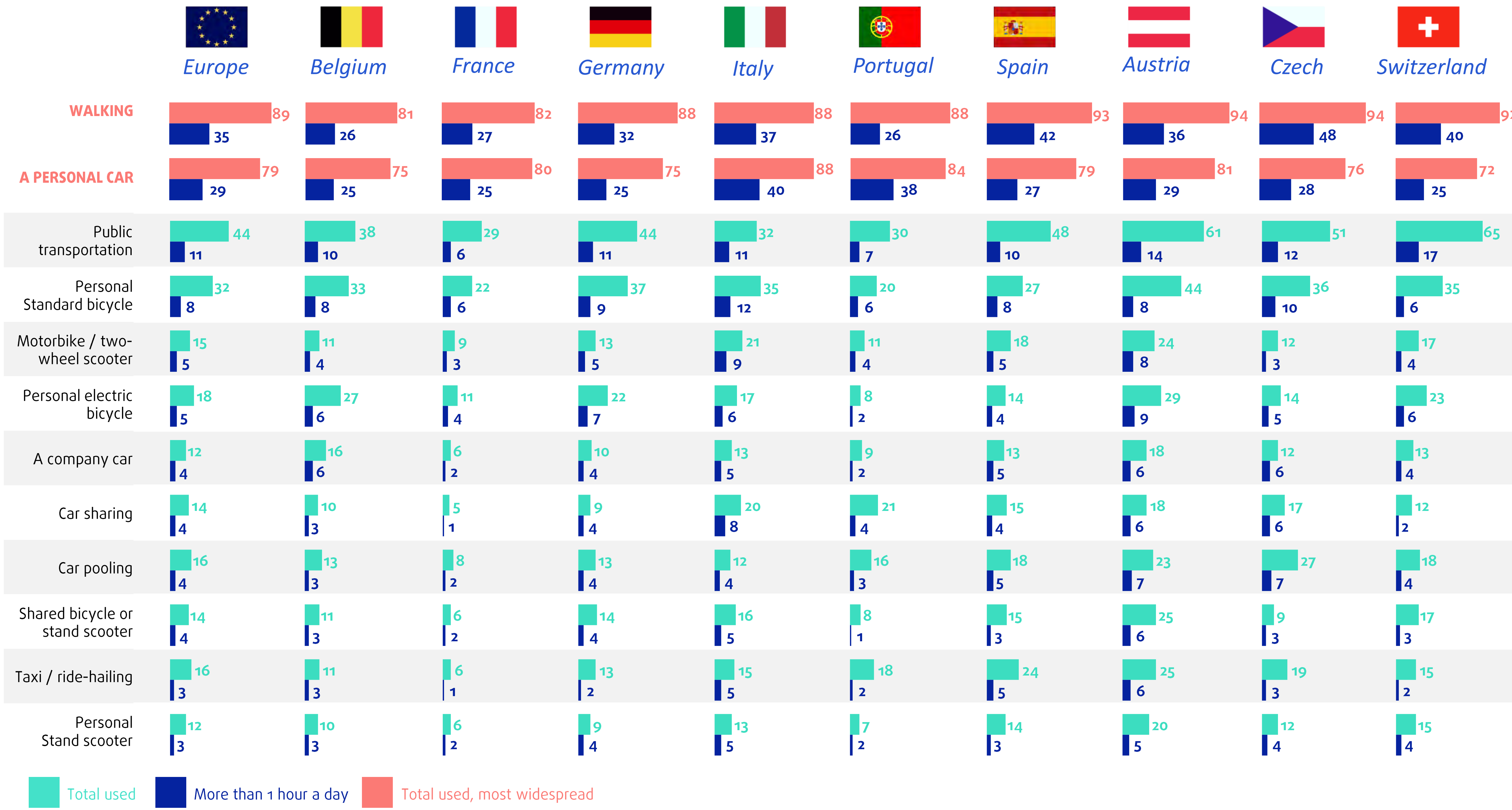
	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Walking	**=**	-1	+1	-1	+2	=	-1	=	=	-
A personal car	**=**	-1	=	-2	-1	+2	-3	=	+6	-
Public transportation	**=**	-1	=	-3	=	+1	+2	+3	-3	-
Personal standard bicycle	**-1**	-1	-2	-1	-7	=	+2	=	+3	-
A company car	**=**	+1	-5	-6	-1	-1	+3	+5	+3	-
Personal electric bicycle	**=**	-1	-4	-3	-4	+1	+4	+4	=	-
Motorbike / two-wheel scooter	**-1**	-3	-3	-4	-3	+1	+4	+3	+2	-
Car pooling	**-1**	-2	-4	-3	-2	+1	+2	+4	-1	-
Car sharing	**=**	=	-5	-4	+1	+3	+3	+4	+3	-
Shared bicycle or stand scooter	**-1**	=	-3	-4	-3	-2	+3	+5	+1	-
Taxi / ride-hailing	**-1**	-2	-3	-4	-1	-2	+2	+3	+3	-
Personal Stand scooter	**-1**	-1	-5	-4	-2	-2	+3	+5	=	-

% Used — Significantly superior to previous wave — Significantly inferior to previous wave

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

A similar use of modes of transportation on weekends



Evolutions in points vs previous wave

« Transport usage **evolves in a similar way on weekends** »

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Walking	**+1**	-1	+1	=	+2	=	+1	=	+1	-
A personal car	**+1**	-3	+1	-2	+1	+1	-1	+3	+4	-
Public transportation	**=**	+2	-2	-3	=	+2	+1	+3	-1	-
Personal standard bicycle	**=**	+2	-4	-2	-5	-2	+3	+2	=	-
Motorbike / two-wheel scooter	**=**	-2	-3	-3	-1	-2	+3	+5	+1	-
Personal electric bicycle	**-1**	-1	-3	-2	-3	-2	+2	+5	+1	-
A company car	**=**	=	-3	-4	-3	-1	+2	+4	+2	-
Car sharing	**=**	-1	-4	-4	-1	+2	+2	+5	+3	-
Car pooling	**-1**	+1	-4	-3	-3	+2	+2	+4	-1	-
Shared bicycle or stand scooter	**-1**	-1	-4	-3	-2	=	+3	+4	=	-
Taxi / ride-hailing	**=**	-2	-4	-3	-2	=	+2	+4	+3	-
Personal Stand scooter	**-1**	-1	-5	-3	-3	-3	-2	+5	=	-

% Used | Significantly superior to previous wave | Significantly inferior to previous wave

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

Base: All

Overall, **no major evolution in main mobility habits**, except some slight evolutions mainly in France and Austria

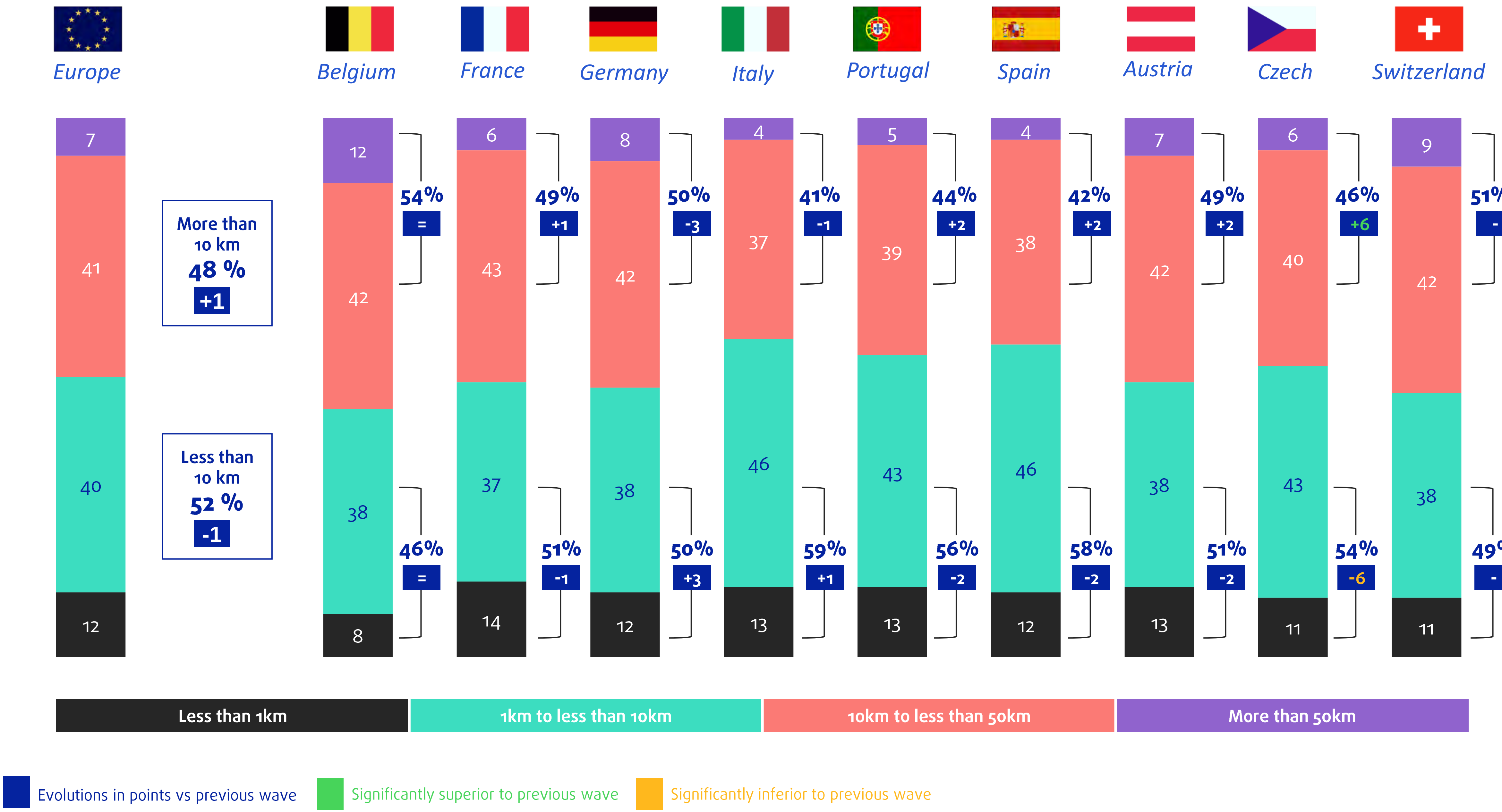
	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
WALKING	95	+1	89	=	91	+2	95	-1	96	+2	94	=	98	=	97	-1	98	=	96	-
A PERSONAL CAR	84	+1	81	-1	86	+1	81	-1	93	-1	88	+1	84	-2	85	+2	82	+6	77	-
Public transportation	58	=	50	+1	41	=	58	-3	46	+1	45	+1	63	+1	74	+2	66	-3	76	-
Personal standard bicycle	39	=	41	+2	27	-4	46	-1	42	-6	24	-2	32	+4	53	+1	44	+1	45	-
Car pooling	22	-1	17	=	13	-4	18	-3	15	-3	24	+2	23	+2	31	+4	37	-1	24	-
Taxi / ride-hailing	21	-1	13	-1	9	-4	18	-3	19	-1	24	-2	32	+2	32	+3	24	+3	21	-
Personal electric bicycle	21	-1	30	-1	13	-4	25	-1	20	-5	11	-1	17	+3	32	+5	16	=	27	-
A company car	19	-1	21	+2	9	-5	14	-6	17	-3	21	=	20	+3	26	+5	21	+1	20	-
Car sharing	19	=	13	-1	7	-5	11	-4	27	+1	31	+5	20	+2	22	+4	24	+3	16	-
Shared bicycle or stand scooter	19	=	15	+1	11	-2	21	-3	20	-3	12	-1	18	+3	34	+4	14	+1	25	-
Motorbike / two-wheel scooter	18	-1	13	-3	10	-4	15	-3	23	-4	15	-1	21	+3	26	+4	14	+1	20	-
Personal Stand scooter	14	-1	12	-1	8	-5	11	-3	16	-2	10	-2	16	+2	24	+6	15	+1	18	-

Evolutions in points vs previous wave
Significantly superior to previous wave
Significantly inferior to previous wave
At least one use %, most widespread

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

Commuting distance **stays stable** overall



	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
More than 50km	7	12	6	8	4	5	4	7	6	9
10km to less than 50km	41	42	43	42	37	39	38	42	40	42
More than 10 km	48 % (+1)	54% (=)	49% (+1)	50% (-3)	41% (-1)	44% (+2)	42% (+2)	49% (+2)	46% (+6)	51% (-)
1km to less than 10km	40	38	37	38	46	43	46	38	43	38
Less than 1km	12	8	14	12	13	13	12	13	11	11
Less than 10 km	52 % (-1)	46% (=)	51% (-1)	50% (+3)	59% (+1)	56% (-2)	58% (-2)	51% (-2)	54% (-6)	49% (-)

Q9 - Which days of the week do you typically work from home?

Base: Workers

In Europe Home Office is less used, but it is used more regularly than past year

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
AVERAGE OF DAYS*	**1,2**		**1,2**		**1,3**		**1,4**		**0,9**		**1,2**		**1,1**		**1,3**		**0,9**		**1,4**	
Mondays	**18**	**+3**	18	-2	21	+3	23	+6	14	+4	19	+5	18	+4	18	+5	10	+1	22	-
Tuesdays	**17**	**+3**	16	-3	21	=	21	+5	15	+4	20	+7	17	+2	18	+8	9	+1	19	-
Wednesdays	**20**	**+4**	24	+2	22	+4	23	+3	17	+4	20	+7	19	+4	18	+5	12	+3	22	-
Thursdays	**19**	**+4**	18	-3	23	+4	22	+3	17	+4	19	+5	19	+4	21	+8	11	+3	23	-
Fridays	**23**	**+5**	26	+4	25	+4	28	+7	17	+3	23	+7	20	+1	23	+7	17	+6	24	-
It depends, no regular days	**10**	**-10**	8	-9	5	-8	12	-7	6	-15	8	-20	5	-10	13	-5	12	-4	14	-
I NEVER WORK FROM HOME	**56**	**+8**	49	+9	58	+3	49	-1	64	+11	61	+9	59	+1	51	+15	64	+16	49	-

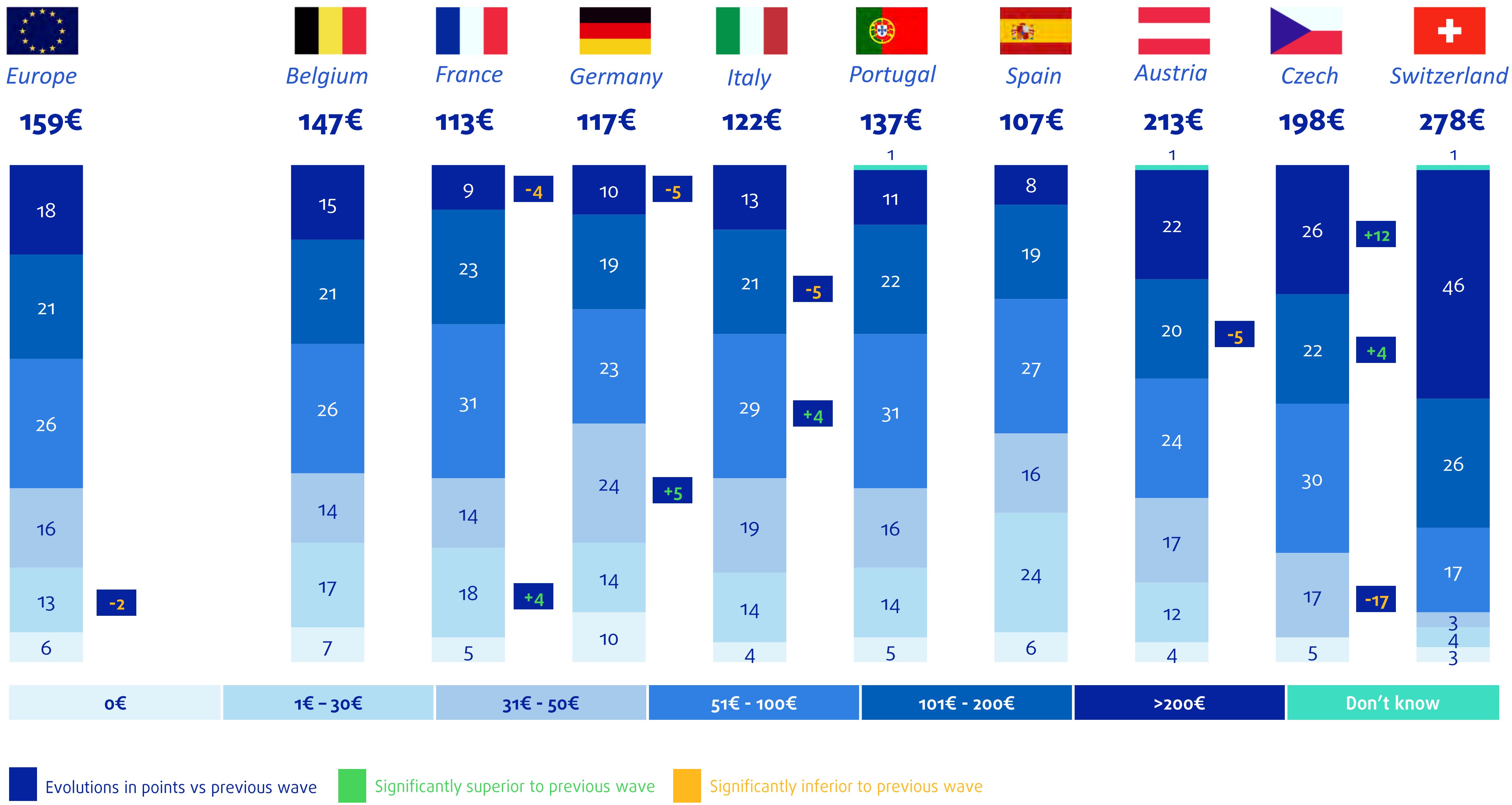
***Average excluding "I never work from home"**

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave | Total used, most widespread

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

Mobility budget is stable overall in Europe (8 countries), higher budgets in switzerland



01

MOBILITY HABITS IN EUROPE

Evolutions compared to 5 years ago

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?

Base: Modes of transportation users

Europeans keep saying they have mostly increased **their use of electric bikes and walking**

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
PERSONAL ELECTRIC BICYCLE	38	45	44	45	31	26	28	34	34	42
WALKING	35	33	32	30	38	36	38	36	32	37
Public transportation	33	32	37	27	28	35	35	33	29	35
A company car	26	29	33	22	25	27	21	18	31	28
Personal stand scooter	25	24	35	27	20	30	27	18	29	25
Personal standard bicycle	24	24	32	20	30	30	25	20	21	23
Taxi / ride-hailing	23	23	29	20	25	34	17	19	26	19
Motorbike / two-wheel scooter	23	26	23	20	29	30	22	19	24	20
A personal car	22	18	13	18	24	29	20	24	30	24
Car sharing	22	19	25	32	23	22	22	20	22	24
Car pooling	22	23	33	23	23	21	24	22	20	17
Shared bicycle or stand scooter	22	22	25	23	28	17	28	16	25	18

Total used, most widespread

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?

Base: Modes of transportation users

…whereas modes **involving car sharing** with others **decline**

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Personal electric bicycle	**22**	20	21	11	22	41	28	22	25	24
Walking	**14**	16	17	11	13	19	10	12	19	12
Public transportation	**22**	24	21	22	26	25	20	21	24	18
A company car	**28**	26	17	22	29	30	33	34	25	30
Personal stand scooter	**30**	31	27	36	21	36	29	34	32	26
Personal standard bicycle	**26**	28	22	22	18	32	25	30	30	28
TAXI / RIDE-HAILING	**34**	**35**	**27**	**39**	**29**	**30**	**34**	**39**	**32**	**34**
Motorbike / two-wheel scooter	**30**	29	27	30	22	32	26	34	33	32
A personal car	**26**	30	32	24	25	23	24	27	19	28
CAR SHARING	**33**	**33**	**34**	**23**	**28**	**35**	**27**	**37**	**35**	**39**
CAR POOLING	**31**	**32**	**23**	**26**	**28**	**42**	**30**	**28**	**31**	**32**
SHARED BICYCLE OR STAND SCOOTER	**32**	**36**	**32**	**29**	**27**	**45**	**26**	**34**	**35**	**32**

Total used, most widespread

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?

Base: Modes of transportation users

Overall, **personal electric bicycle, walking and public transportation** keep showing the most positive delta of use

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Personal electric bicycle	**+16**	+25	+23	+34	+9	-15	0	+12	+9	+18
Walking	**+21**	+17	+15	+19	+25	+17	+28	+24	+13	+25
Public transportation	**+11**	+8	+16	+5	+2	+10	+15	+12	+5	+17
A company car	**-2**	+3	+16	0	-4	-3	-12	-16	+6	-2
Personal stand scooter	**-5**	-7	+8	-9	-1	-6	-2	-16	-3	-1
Personal standard bicycle	**-2**	-4	+10	-2	+12	-2	0	-10	-9	-5
Taxi / ride-hailing	**-11**	-12	+2	-19	-4	+4	-17	-20	-6	-15
Motorbike / two-wheel scooter	**-7**	-3	-4	-10	+7	-2	-4	-15	-9	-12
A personal car	**-4**	-12	-19	-6	-1	+6	-4	-3	+11	-4
Car sharing	**-11**	-14	-9	+9	-5	-13	-5	-17	-13	-15
Car pooling	**-9**	-9	+10	-3	-5	-21	-6	-6	-11	-15
Shared bicycle or stand scooter	**-10**	-14	-7	-6	+1	-28	+2	-18	-10	-14

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?

Base: Have changed their mobility habits

Changes in mobility habits are mainly driven by economic reasons, particularly in France, Germany and Belgium.

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
NET PROFESSIONAL REASON	**29**	=	**25**	-1	**20**	-1	**30**	+2	**26**	+1	**31**	-5	**28**	-2	**29**	+2	**34**	=	**35**	-
NET PERSONAL REASON	**44**	+2	**41**	=	**39**	-1	**41**	-1	**42**	+4	**46**	+5	**42**	=	**48**	+3	**48**	-1	**47**	-
I am concerned about cost of transports	**32**	**-2**	36	+4	41	-5	38	-1	30	-1	28	-8	29	-6	33	-2	27	+2	28	-
My family / personal situation evolved	**30**	**1**	27	-1	24	+1	28	-1	30	+3	31	+7	28	-2	33	=	36	+1	28	-
I am concerned about environmental impact of transports	**23**	**-1**	23	-1	23	-7	25	-1	25	=	20	-4	34	+4	23	-4	11	+2	25	-
I moved to another place of residence	**21**	**=**	19	=	22	=	20	=	14	=	22	-1	19	+2	22	+2	20	-1	27	-
I started a new job	**16**	**-1**	14	+1	10	=	16	-1	13	+2	19	-1	15	-1	16	+1	19	-2	24	-
It was imposed by local government	**16**	**=**	20	-2	19	+1	16	-2	15	+2	17	+1	12	=	14	-2	15	-1	16	-
I have more flexibility on ways of working	**15**	**-1**	14	=	10	-1	16	+1	16	=	16	-4	16	-2	16	+1	18	+2	15	-
Due to the financial support from the government	**2**	**=**	3	-1	3	=	3	-1	3	-1	2	-1	3	=	2	=	2	-1	2	-
Other, specify	**5**	**-1**	5	+1	3	-2	7	=	4	-1	4	=	10	-3	6	+1	3	-1	4	-

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave

* The question has been changed vs 2022
"You said that you have changed your mobility habits compared to last year?

V24Q5 - What policies or incentives would motivate you the most to use each one of those more environmentally friendly mobility options on a regular basis, or more often if you already use them?

Base: All

Cost reduction is by far the first motivation to use public transportation more often, whereas for bicycles cost is neck and neck with infrastructures.

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
PUBLIC TRANSPORTATION										
#1	Reduce cost 44%	Improve punctuality 44%	Reduce cost 43%	Reduce cost 42%	Improve punctuality 41%	Reduce cost 44%	Reduce cost 42%	Reduce cost 47%	Reduce cost 46%	Reduce cost 54%
#2	Improve punctuality 37%	Reduce cost 42%	Improve availability 43%	Improve punctuality 41%	Reduce cost 38%	Improve punctuality 42%	Improve punctuality 36%	Improve availability 40%	Improve availability 28%	Improve availability 32%
#3	Improve availability 35%	Improve availability 36%	Improve punctuality 38%	Improve availability 37%	Improve availability 30%	Improve availability 37%	Improve availability 34%	Improve punctuality 35%	Improve punctuality 24%	Improve punctuality 29%

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
PERSONAL BICYCLE OR STAND SCOOTER										
#1	Reduce cost 32%	Improve infrastructure 37%	Improve infrastructure 40%	Reduce cost 34%	Increase safety 31%	Reduce cost 38%	Improve infrastructure 31%	Reduce cost 38%	Reduce cost 37%	Reduce cost 35%
#2	Improve infrastructure 32%	Increase safety 30%	Increase safety 34%	Improve infrastructure 31%	Improve infrastructure 30%	Improve infrastructure 35%	Reduce cost 29%	Improve infrastructure 28%	Improve infrastructure 28%	Improve infrastructure 31%
#3	Increase safety 26%	Reduce cost 23%	Reduce cost 24%	Increase safety 20%	Reduce cost 26%	Increase safety 29%	Increase safety 26%	Increase safety 20%	Increase safety 23%	Increase safety 25%

Significantly superior to European average

Significantly inferior to European average

V24Q5 - What policies or incentives would motivate you the most to use each one of those more environmentally friendly mobility options on a regular basis, or more often if you already use them?

Base: All

Cost is also the main driver for car-sharing and shared two-wheels, safety being also important for the latter.

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
CAR SHARING										
#1	Reduce cost 41%	Improve availability 39%	Reduce cost 36%	Reduce cost 40%	Reduce cost 37%	Reduce cost 41%	Reduce cost 45%	Reduce cost 41%	Reduce cost 49%	Reduce cost 43%
#2	Improve availability 33%	Reduce cost 37%	Improve availability 33%	Improve availability 38%	Improve availability 37%	Increase safety 32%	Improve availability 27%	Improve availability 41%	Improve availability 29%	Improve availability 38%
#3	Increase safety 17%	Make it more comfortable 14%	Increase safety 19%	Improve punctuality 14%	Make it more comfortable 23%	Improve availability 23%	Increase safety 19%	Improve punctuality 15%	Increase safety 17%	Improve availability 15%
SHARED MOPED / TWO WHEELS										
#1	Reduce cost 32%	Increase safety 27%	Increase safety 34%	Reduce cost 35%	Increase safety 29%	Reduce cost 37%	Reduce cost 31%	Reduce cost 35%	Reduce cost 39%	Reduce cost 35%
#2	Increase safety 25%	Improve infrastructure 25%	Improve infrastructure 28%	Improve availability 27%	Reduce cost 28%	Increase safety 27%	Increase safety 30%	Improve availability 32%	Improve availability 28%	Improve availability 27%
#3	Improve availability 25%	Reduce cost 24%	Reduce cost 27%	Increase safety 18%	Improve availability 20%	Improve availability 24%	Improve availability 23%	Increase safety 21%	Increase safety 18%	Increase safety 22%

Significantly superior to European average

Significantly inferior to European average

V24Q5 - What policies or incentives would motivate you the most to use each one of those more environmentally friendly mobility options on a regular basis, or more often if you already use them?

Base: All

Cost, availability and infrastructure are close to each other as motivations to use more often shared bikes/ stand scooters.

SHARED BICYCLES OR STAND SCOOTERS

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
#1	Reduce cost 33%	Improve infrastructure 28%	Improve infrastructure 37%	Reduce cost 36%	Reduce cost 28%	Reduce cost 37%	Reduce cost 30%	Reduce cost 38%	Reduce cost 38%	Reduce cost 36%
#2	Improve availability 27%	Increase safety 27%	Increase safety 32%	Improve availability 30%	Improve availability 28%	Increase safety 31%	Increase safety 28%	Improve availability 33%	Improve availability 26%	Improve availability 30%
#3	Improve infrastructure 27%	Improve availability 26%	Reduce cost 27%	Improve infrastructure 22%	Improve infrastructure 27%	Improve infrastructure 30%	Improve infrastructure 26%	Improve infrastructure 21%	Improve infrastructure 24%	Improve infrastructure 27%

Significantly superior to European average   Significantly inferior to European average

01

MOBILITY HABITS IN EUROPE

Future Intentions

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

Enthusiasm for e-bikes appears less intense than last year (especially in Germany, Italy and Austria)

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
Walking	**31**	**-1**	29	+1	29	-4	22	-2	41	+1	37	+3	30	-4	31	-6	32	+4	34	-
Public transportation	**25**	**=**	24	+2	26	-1	20	-1	27	-3	27	-1	25	-4	28	+2	21	+4	27	-
Personal electric bicycle	**27**	**-6**	31	-1	34	-4	24	-10	27	-11	23	-4	23	=	23	-8	27	+1	29	-
Personal standard bicycle	**24**	**=**	25	+6	25	-5	17	-6	34	=	30	-1	22	-3	22	-1	24	+2	20	-
A personal car	**14**	**-1**	12	=	8	-3	13	=	14	-2	18	+1	13	-1	15	=	18	-1	15	-
Motorbike / two-wheel scooter	**20**	**-1**	17	-3	24	+4	18	-3	19	-5	23	=	18	-3	20	+1	23	-1	22	-
Personal Stand scooter	**20**	**-6**	16	-6	20	-12	23	-12	24	-6	29	6	20	-4	18	=	16	-9	17	-
A company car	**17**	**-1**	14	-4	15	-5	15	-10	21	+2	16	-6	12	-3	18	+7	19	+4	15	-
Car pooling	**16**	**-2**	19	+2	19	-7	19	-5	23	+3	15	-4	19	=	14	-5	12	+1	15	-
Shared bicycle or stand scooter	**18**	**-1**	20	-2	14	-14	19	-2	24	-1	30	+14	20	=	15	=	16	-1	14	-
Car sharing	**16**	**-3**	15	+5	25	-2	18	-16	19	-3	13	-3	17	-5	17	-2	17	+4	13	-
Taxi / ride-hailing	**15**	**-1**	18	=	18	-5	10	-9	19	-8	17	+5	15	+1	11	=	15	+4	15	-

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave

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

An anticipated decrease in frequency of use mainly for shared bicycle or stand scooters, especially in Belgium, Italy and Austria

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
Walking	**8**	**+1**	8	=	7	=	7	=	7	-2	8	=	7	=	8	+1	9	+2	6	-
Public transportation	**13**	**+1**	13	+1	11	=	13	-1	17	-1	18	+3	13	+1	15	+2	12	-1	10	-
Personal electric bicycle	**18**	**+2**	13	-1	16	+4	10	-3	23	+7	27	-6	20	-7	22	+6	22	-2	14	-
Personal standard bicycle	**16**	**-3**	17	-1	13	-8	11	-6	14	+2	17	-3	16	-5	18	=	16	-3	19	-
A personal car	**16**	**=**	18	+4	15	-4	14	+1	19	-1	14	-2	16	-2	19	+2	12	+2	16	-
Motorbike / two-wheel scooter	**25**	**+3**	32	+10	25	+3	23	+3	18	+1	21	-4	26	+3	25	+4	31	+4	23	-
Personal Stand scooter	**27**	**+3**	31	+3	31	+9	22	+5	30	+9	27	-4	20	-3	28	=	31	+5	27	-
A company car	**24**	**+1**	24	+5	10	-15	19	-1	25	-4	24	+4	28	+6	30	+1	23	+1	26	-
Car pooling	**24**	**+1**	25	-1	20	-6	24	+4	28	+6	22	-1	25	+3	26	+2	23	+1	26	-
Shared bicycle or stand scooter	**30**	**+5**	37	+14	33	+3	23	+1	30	+11	32	-2	23	-9	33	+9	38	+2	24	-
Car sharing	**28**	**+2**	32	+5	28	+10	21	-1	27	+4	22	-1	22	-3	32	+2	32	+1	37	-
Taxi / ride-hailing	**29**	**-1**	35	+7	19	-12	29	-1	30	+6	27	-5	27	+3	29	+1	26	-8	34	-

Evolutions in points vs previous wave — Significantly superior to previous wave — Significantly inferior to previous wave

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

A positive delta for walking, for public transportation and bicycles (Electric and standard)

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
WALKING	**+23**	**+21**	**+22**	**+15**	**+34**	**+29**	**+23**	**+23**	**+23**	**+28**
PUBLIC TRANSPORTATION	**+12**	**+11**	**+15**	**+7**	**+10**	**+9**	**+12**	**+13**	**+9**	**+17**
PERSONAL ELECTRIC BICYCLE	**+9**	**+18**	**+18**	**+14**	**+4**	**-4**	**+3**	**+1**	**+5**	**+15**
PERSONAL STANDARD BICYCLE	**+8**	**+8**	**+12**	**+6**	**+20**	**+13**	**+6**	**+4**	**+8**	**+1**
A personal car	**-2**	-6	-7	-1	-5	+4	-3	-4	+6	-1
Motorbike / two-wheel scooter	**-5**	-15	-1	-5	+1	+2	-8	-5	-8	-1
Personal Stand scooter	**-7**	-15	-11	+1	-6	+2	0	-10	-15	-10
A company car	**-7**	-10	5	-4	-4	-8	-16	-12	-4	-11
Car pooling	**-8**	-6	-1	-5	-5	-7	-6	-12	-11	-11
Shared bicycle or stand scooter	**-12**	-17	-19	-4	-6	-2	-3	-18	-22	-10
Car sharing	**-12**	-17	-3	-3	-8	-9	-5	-15	-15	-24
Taxi / ride-hailing	**-14**	-17	-1	-19	-11	-10	-12	-18	-11	-19

Most widespread

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

Electric bikes generate the highest enthusiasm (intention to use more frequently) in France, Belgium and Germany

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Walking	31 / 61 / 8	29 / 63 / 8	29 / 64 / 7	22 / 71 / 7	41 / 52 / 7	37 / 55 / 8	30 / 63 / 7	31 / 61 / 8	32 / 59 / 9	34 / 60 / 6
Public transportation	25 / 62 / 13	24 / 63 / 13	26 / 63 / 11	20 / 67 / 13	27 / 56 / 17	27 / 55 / 18	25 / 62 / 13	28 / 57 / 15	21 / 67 / 12	27 / 63 / 10
Personal electric bicycle	27 / 55 / 18	31 / 56 / 13	34 / 50 / 16	24 / 66 / 10	27 / 50 / 23	23 / 50 / 27	23 / 57 / 20	23 / 55 / 22	27 / 51 / 22	29 / 57 / 14
Personal standard bicycle	24 / 60 / 16	25 / 58 / 17	25 / 62 / 13	17 / 72 / 11	34 / 52 / 14	30 / 53 / 17	22 / 62 / 16	22 / 60 / 18	24 / 60 / 16	20 / 61 / 19
A personal car	14 / 70 / 16	12 / 70 / 18	8 / 77 / 15	13 / 73 / 14	14 / 67 / 19	18 / 68 / 14	13 / 71 / 16	15 / 66 / 19	18 / 70 / 12	15 / 69 / 16
Motorbike / two-wheel scooter	20 / 55 / 25	17 / 51 / 32	24 / 51 / 25	18 / 59 / 23	19 / 63 / 18	23 / 56 / 21	18 / 56 / 26	20 / 55 / 25	23 / 46 / 31	22 / 55 / 23
Personal Stand scooter	20 / 53 / 27	16 / 53 / 31	20 / 49 / 31	23 / 55 / 22	24 / 46 / 30	29 / 44 / 27	20 / 60 / 20	18 / 54 / 28	16 / 53 / 31	17 / 56 / 27
A company car	17 / 59 / 24	14 / 62 / 24	15 / 75 / 10	15 / 66 / 19	21 / 54 / 25	16 / 60 / 24	12 / 60 / 28	18 / 52 / 30	19 / 58 / 23	15 / 59 / 26
Car pooling	16 / 60 / 24	19 / 56 / 25	19 / 61 / 20	19 / 57 / 24	23 / 49 / 28	15 / 63 / 22	19 / 56 / 25	14 / 60 / 26	12 / 65 / 23	15 / 59 / 26
Shared bicycle or stand scooter	18 / 52 / 30	20 / 43 / 37	14 / 53 / 33	19 / 58 / 23	24 / 46 / 30	30 / 38 / 32	20 / 57 / 23	15 / 52 / 33	16 / 46 / 38	14 / 62 / 24
Car sharing	16 / 56 / 28	15 / 53 / 32	25 / 47 / 28	18 / 61 / 21	19 / 54 / 27	13 / 65 / 22	17 / 61 / 22	17 / 51 / 32	17 / 51 / 32	13 / 50 / 37
Taxi / ride-hailing	15 / 56 / 29	18 / 47 / 35	18 / 63 / 19	10 / 61 / 29	19 / 51 / 30	17 / 56 / 27	15 / 58 / 27	11 / 60 / 29	15 / 59 / 26	15 / 51 / 34

More frequently than today / Equally frequently than today / Less frequently than today

01

MOBILITY HABITS IN EUROPE

Attitudes

Q56 - How much do you agree or disagree with the following statements?

Base: All

In Czech Republic, **lower concerns for environmental impact**, unlike Portugal where it is highest

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
Environmental questions must be a priority for governments	**72**	=	69	-1	74	-2	69	=	75	-4	89	+1	83	+1	69	+1	52	-3	70	-
I pay attention to the impact my driving habits have on the environment	**72**	-1	68	=	72	-3	67	-1	80	+3	82	=	80	+5	69	+2	63	-5	64	-
It is a good thing to impose restrictive regulations so that cars become less polluting	**66**	=	66	-2	63	-3	61	+3	73	=	85	=	74	+1	60	+3	50	-1	61	-
I pay attention to the environmental impact when choosing my mode of transport*	**63**	-	61	-	60	-	60	-	72	-	73	-	72	-	60	-	53	-	61	-
I have already changed my daily mobility habits to be greener	**60**	=	56	=	56	-4	57	-2	67	+3	63	-1	72	+5	60	+1	49	-2	57	-
Electric Vehicles are better for the environment than thermic vehicles	**53**	=	48	-2	45	-6	51	+4	59	-3	70	-6	68	+3	45	+2	45	+2	49	-
Mobility incentives issued by the government in your country are positive	**48**	=	38	+1	43	-8	44	+2	56	+2	55	=	61	-1	48	+4	35	-1	49	-
I feel bad about the ecological footprint linked to the usage of my car	**45**	-2	37	-3	37	-3	35	-2	54	-2	61	-6	72	=	37	+4	38	-4	37	-
EU regulations imposing the sale of electric Vehicles by 2035 are realistic and will be applied	**40**	-1	32	-4	29	-6	38	+3	52	-3	54	-1	53	=	36	+3	26	-2	37	-

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave | ***New item 2025**

KEY LEARNINGS

- **This year's barometer shows an overall stability in Europeans' mobility habits**, with the two main modes used still being walking and personal car. **Bicycles remain widespread**, with almost half of Europeans using a bike (standard or electric) at least occasionally.
- In Switzerland, but also in Austria, the Czech Republic and Spain, public transports are more widely used than in other countries.
- When looking at the evolutions over time, **electric bikes show a positive trend**, with a **more frequent use** than before. Walking and public transportation also show a positive evolution.
- When **mobility habits have changed**, it is (like last year) mainly due to economical reasons (costs), followed by personal reasons then environmental ones.
- Looking at the **motivations to use more eco-friendly options, cost reduction** appears as the top one for all modes tested. Then follows, depending on the considered mode, either availability (shared bicycles), safety (bicycle) or punctuality (public transport).
- **Future intentions** show a potential of **development for eco-friendly options : bicycles (both standard and electric),** walking and public transportation.
- As for personal cars, **a trend towards a more sensible use of cars :** only 14% of Europeans intend to use it more in the future, while 16% say it would rather be less. This trend to turn away from the car is stronger in France and Belgium.

02

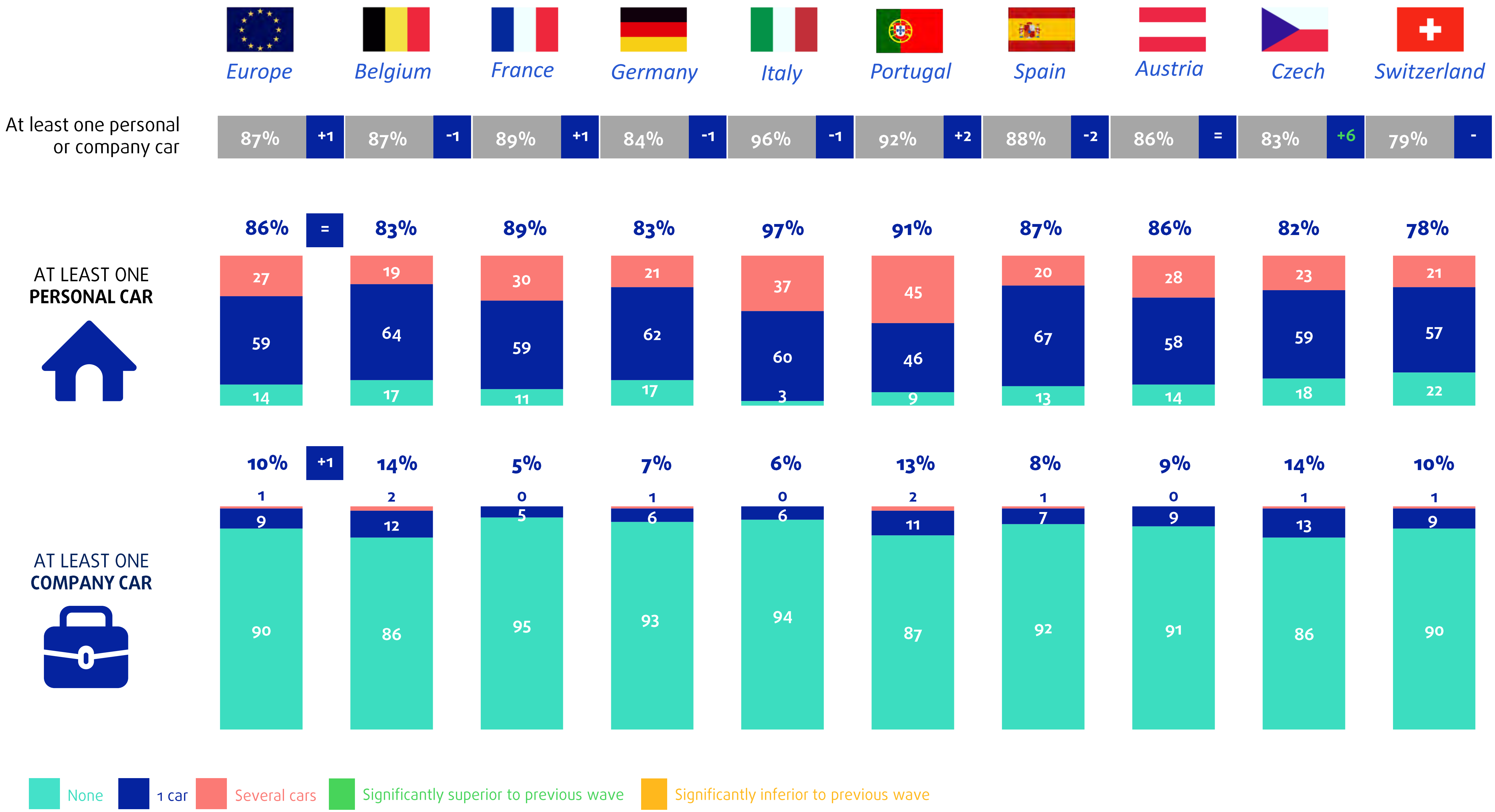
VEHICLES OWNERSHIP & INTENTIONS

Car used most often

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

Base: All

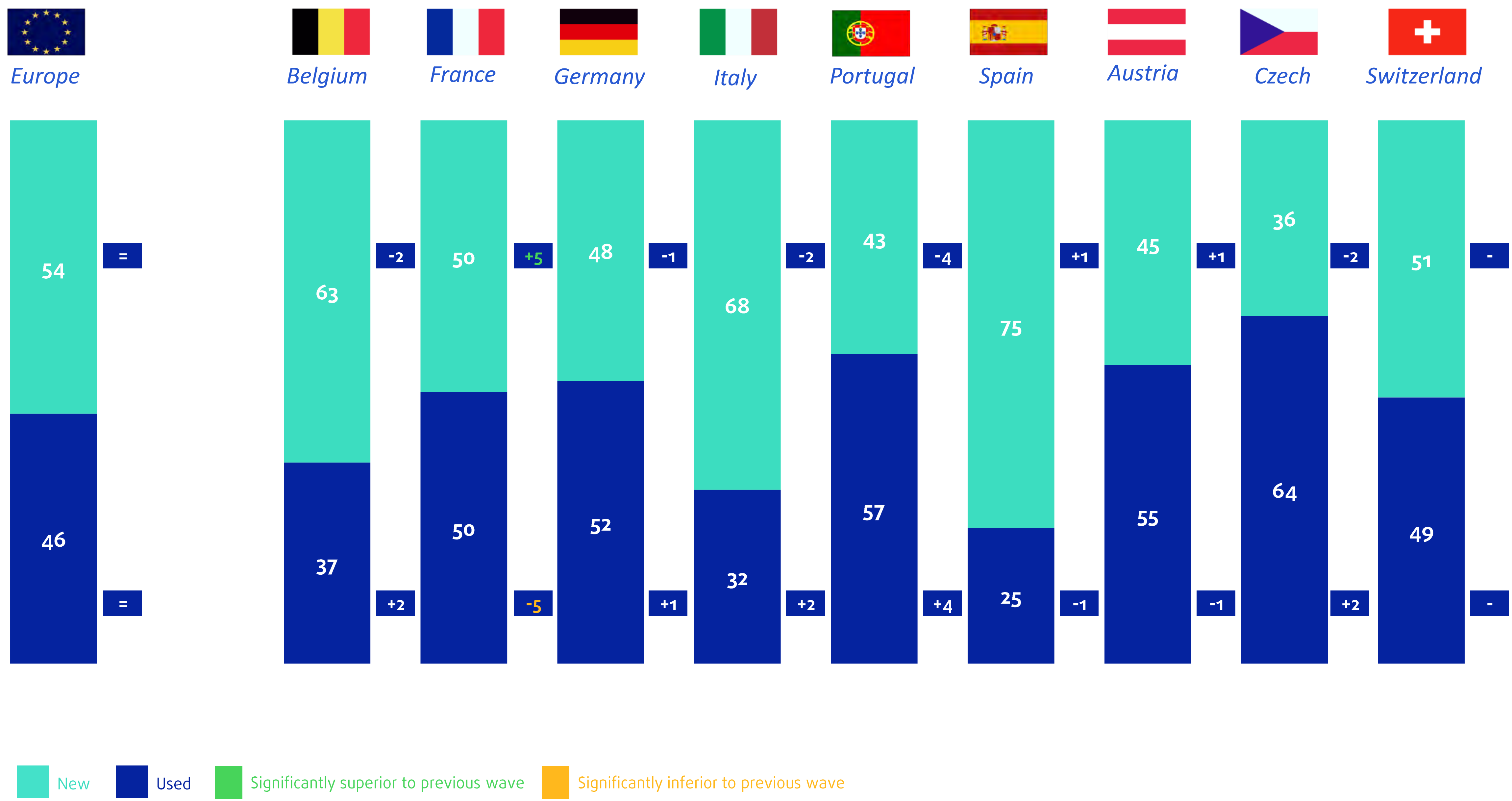
Personal car ownership stays widespread in Europe



Q14B - Was this car bought new or used?

Base: Car Owners

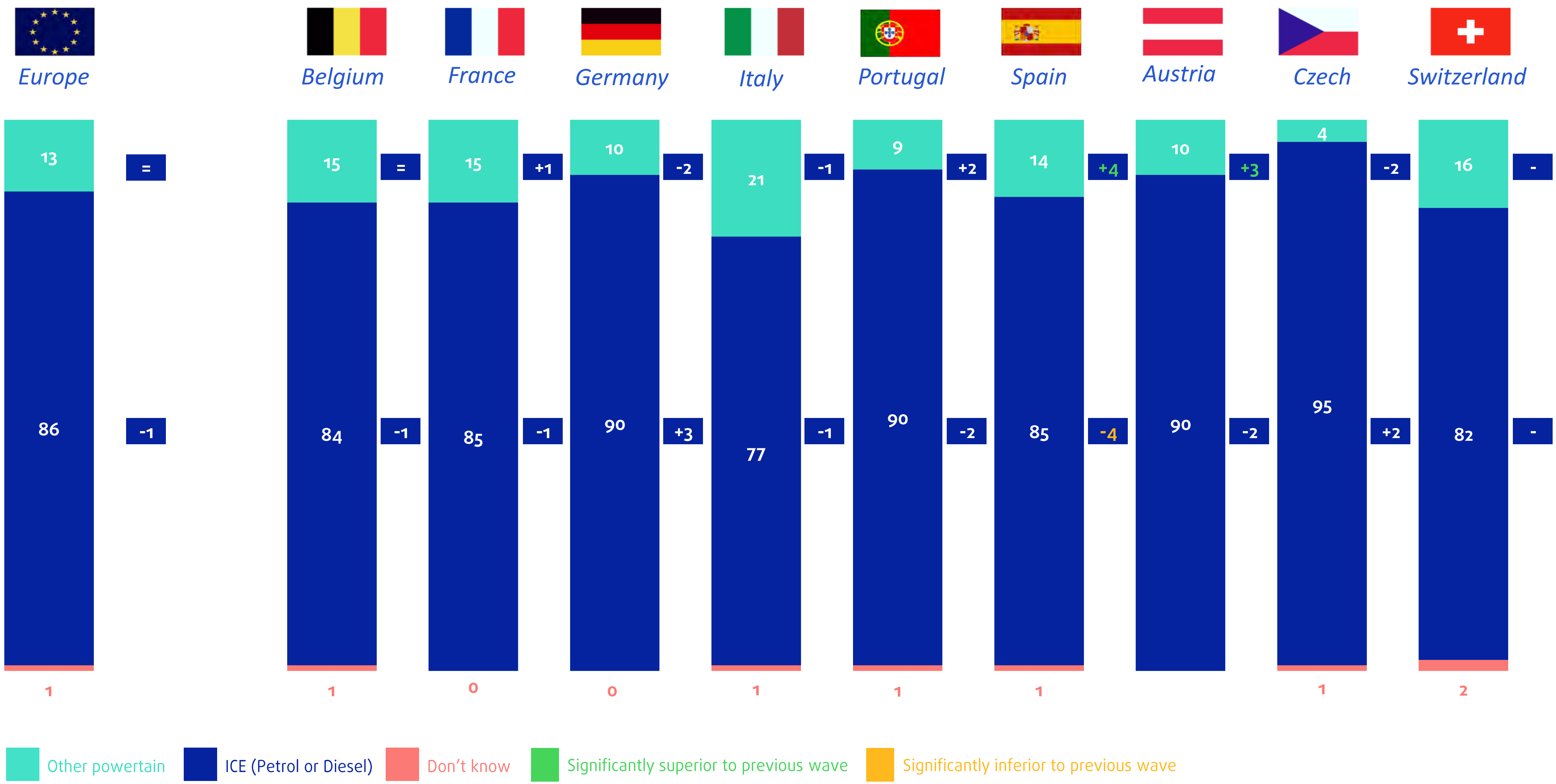
Europeans keep using new and old cars in almost equal proportions overall, with differences by country (Belgium, Italy and Spain having a majority of new vehicles)



Q16 - What is the powertrain of this car?

Base: Car Owners

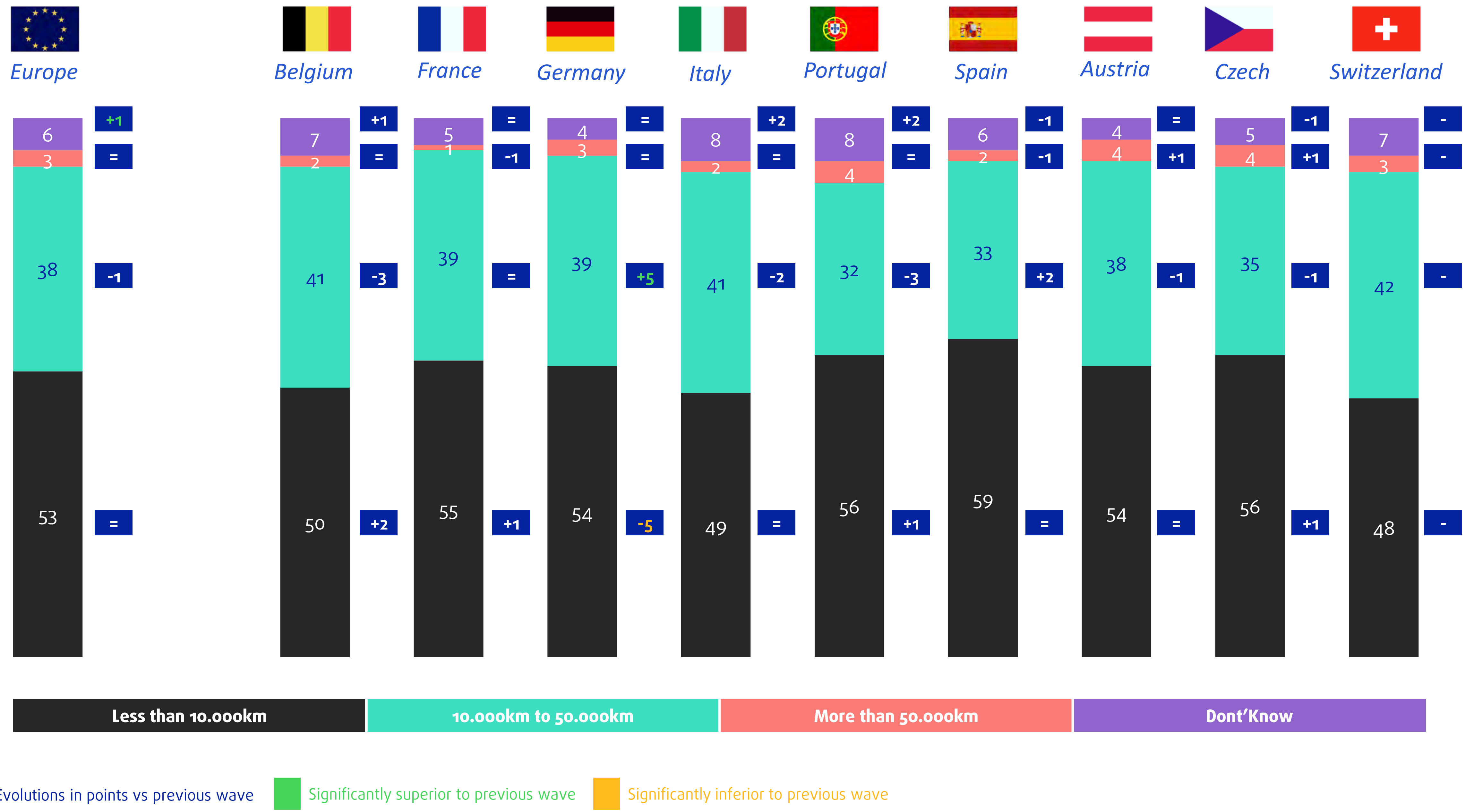
Ice-vehicles are still the majority with same level as the previous year. Other powertains are progressing in Spain and Austria, and already quite present in Switzerland.



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

Stability in the distance covered per year, except in Germany where longer mileage increase.



Full electric vehicles are still a minority, and stable in all countries.

Q16 - What is the powertrain of this car?

Base: Car Owners

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
PETROL	52	+2	59	+5	45	+2	68	+1	43	+2	42	+2	42	-1	47	+1	63	+3	63	-
DIESEL	35	-3	25	-6	40	-3	22	+1	34	-3	48	-4	44	-2	42	-4	33	-1	20	-
Hybrid Electric Vehicle *	5	-1	6	-1	7	=	3	-2	5	-2	2	=	7	+1	3	=	2	-1	7	-
Full Electric *	3	=	4	=	3	-1	4	=	2	=	2	=	2	=	4	=	0	-1	4	-
Plug-in Hybrid *	3	+1	4	+1	2	=	3	+2	4	+2	3	+2	3	+2	2	+1	1	+1	5	-
GPL	2	=	1	=	2	+1	1	=	10	=	2	=	2	+1	0	=	2	0	1	-
Fuel cell Hydrogen	0	=	1	+1	0	=	0	=	1	+1	1	+1	0	=	0	=	0	0	1	-
I don't know	1	=	1	+1	0	=	1	=	2	+2	2	+1	1	=	1	=	1	+1	1	-

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave | Total used, most widespread

A large majority of respondents still preferred a purchase solution to finance their car. Leasing is more developed in Switzerland and Austria.

Q19 - How did you acquire this car?

Base: Personal cars owners

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
NET PURCHASE	**85**	=	87	+1	86	-2	90	=	90	=	87	=	90	+2	79	=	84	+2	72	-
It was bought cash (in one time - without credit)	**58**	=	55	+4	59	-2	68	=	49	-1	56	=	43	+1	67	+3	67	-1	62	-
It was bought partially cash, partially on credit	**18**	=	19	-3	16	-1	15	-1	27	+1	20	+1	30	+1	9	-1	12	+1	7	-
It was bought totally on credit	**9**	=	13	=	11	+1	7	+1	14	=	11	-1	17	=	3	-2	5	+2	3	-
NET LEASING	**9**	=	6	-1	9	=	7	=	4	=	5	-2	6	-1	16	-2	8	+1	22	-
Leasing with initial down payment	**6**	=	3	=	5	=	3	=	2	=	3	-2	4	=	11	-4	5	+2	16	-
Leasing without initial down payment	**3**	=	3	-1	4	=	4	=	2	=	2	=	2	-1	5	+2	3	-1	6	-
It was given for free	**1**	=	1	-1	2	+1	1	+1	1	=	2	=	1	=	2	+2	2	-1	1	-
I don't know	**5**	-1	6	+1	3	+1	2	-1	5	=	6	+2	3	-1	3	=	6	-2	5	-

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave

Q21 - Where did you acquire this car?

Base: Personal cars owners

In Czech Republic, dealerships are much less popular than in other countries, whereas individual sellers and online sales are more spread.

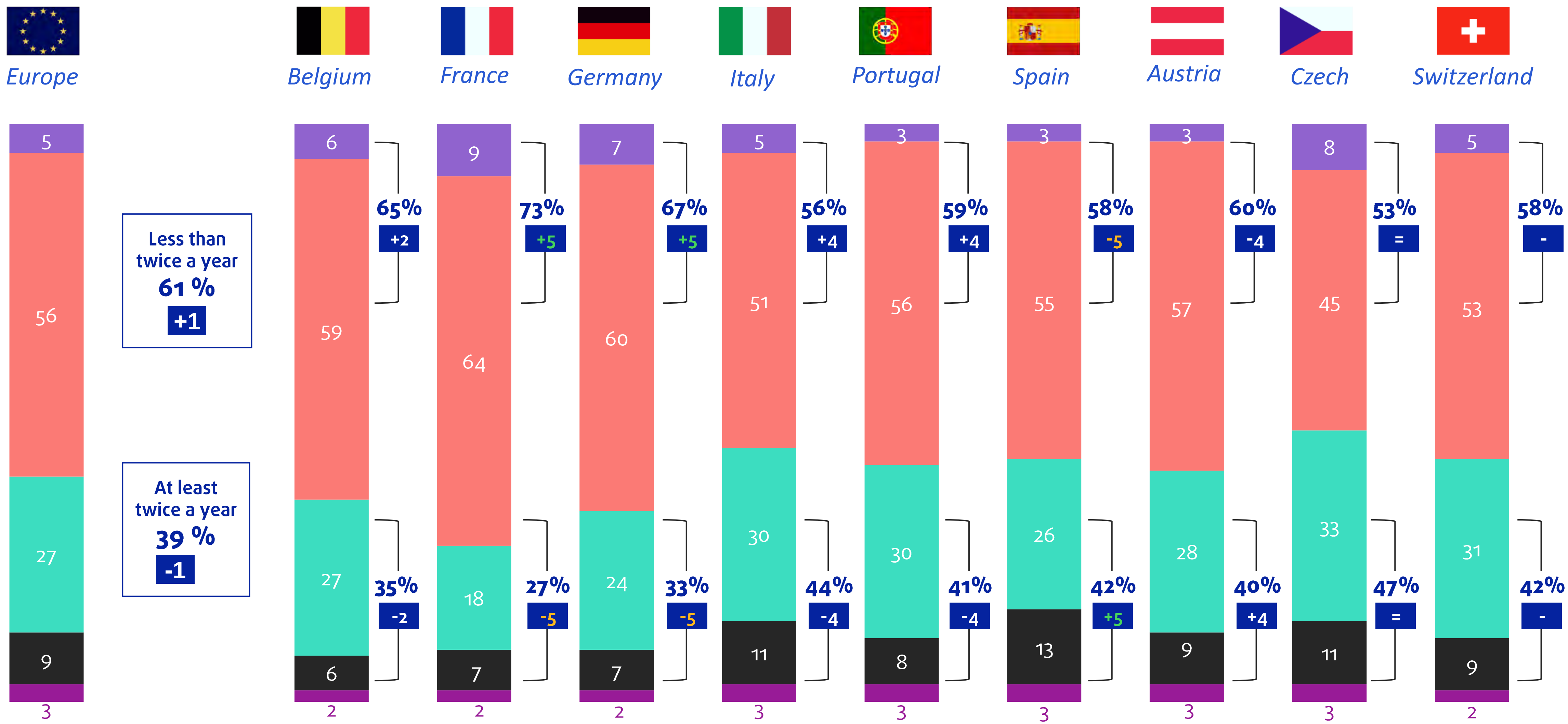
	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
Manufacturer's dealership	**49**	**-1**	58	+1	59	+5	54	-1	48	-1	37	-2	66	-3	49	-5	21	-1	48	-
Independent garage	**18**	**+1**	20	=	18	+1	10	+1	32	=	31	+2	7	=	10	=	13	=	20	-
Directly from an individual seller	**16**	**=**	10	=	10	-3	16	+1	11	-1	20	-2	13	+1	18	+3	28	-1	14	-
NET ONLINE	**13**	**=**	9	-1	9	-3	15	-2	7	+1	6	=	12	+2	20	+3	28	-1	14	-
Online marketplace	**7**	**=**	5	+1	4	-3	8	-2	3	+1	2	=	4	=	14	+3	12	=	10	-
Online sales from car manufacturer, etc	**6**	**=**	4	-2	5	=	7	=	4	=	4	=	8	+2	6	=	16	-1	4	-
Other, specify	**4**	**=**	3	=	4	=	5	+1	2	+1	6	+2	2	=	3	-1	10	+3	4	-

Evolutions in points vs previous wave
Significantly superior to previous wave
Significantly inferior to previous wave

Q23 - How often do you go to workshops or garages for your car repairs, maintenance and servicing?

Base: Car owners

4 out of 10 respondents keep seeing a professional for car maintenance at least twice a year - **an even higher frequency in Czech Republic and Italy.**



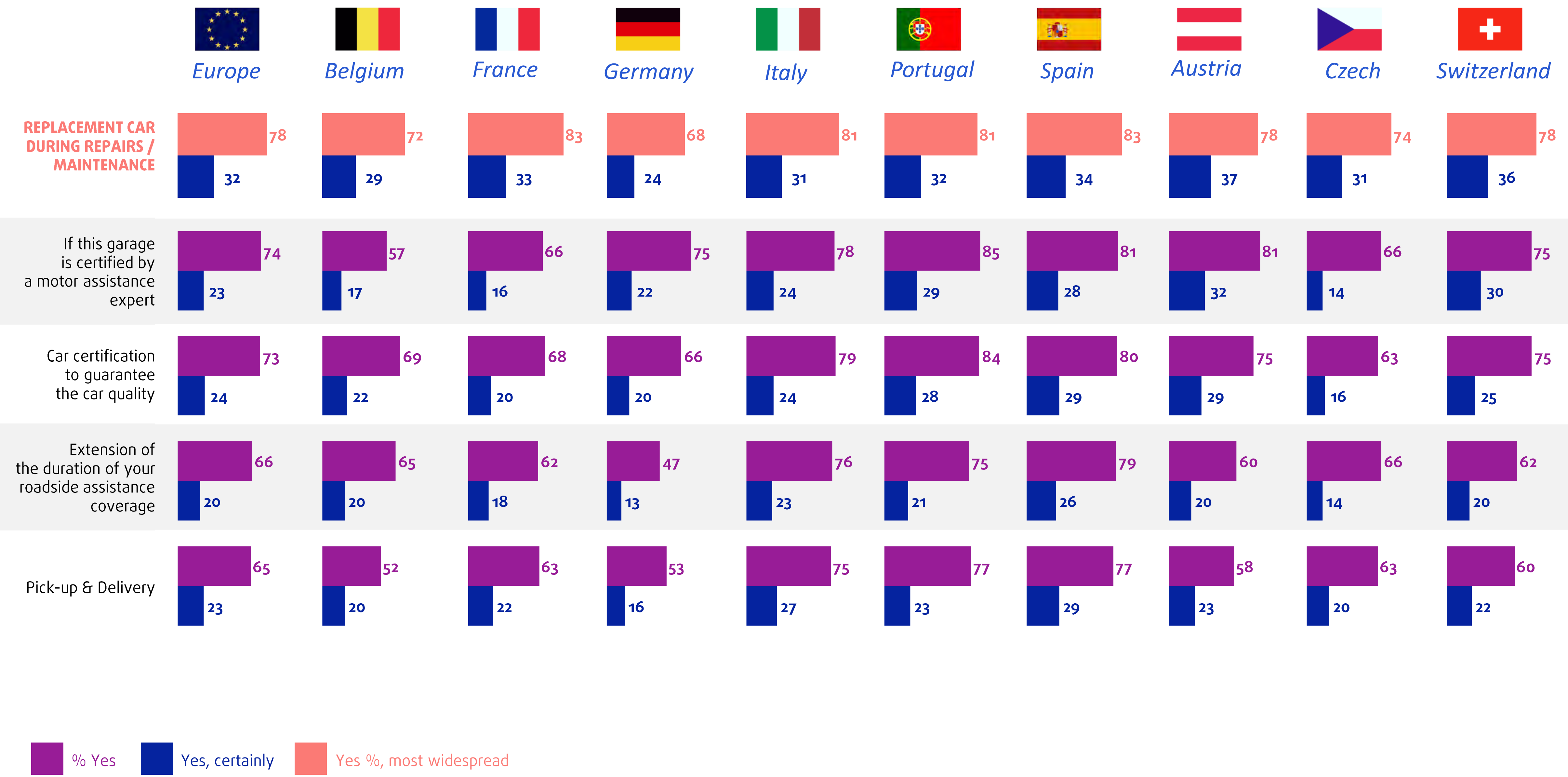
At least once a month | Once every 2 or 3 months | Once every six months | Once a year | Less often

Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave

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

As past years, **replacement car would be the strongest argument** to choose a garage/dealership for repairs and maintenance.



KEY LEARNINGS

- ✓ **Personal car ownership remains widespread in Europe**, with a vast majority of Europeans owning at least one car (87%)
- ✓ No major changes in the car segment split or the proportion of new vs used cars.
- ✓ When looking at powertrains, **ICE vehicles still represent the vast majority of cars used today** ; only 13% of Europeans declare having another type of powertrain, this figure being stable vs last year. Those **"alternative" powertrains are more present in Italy and Switzerland and progressing in Austria and Spain.**
- ✓ **Purchase is still the main way to acquire a car, preferred to leasing** which is more developed in Switzerland and Austria.
- ✓ In terms of purchase channels, **dealerships are still the most popular channel overall,** while online channels are more used in Austria and Czech Republic than in other countries.

02

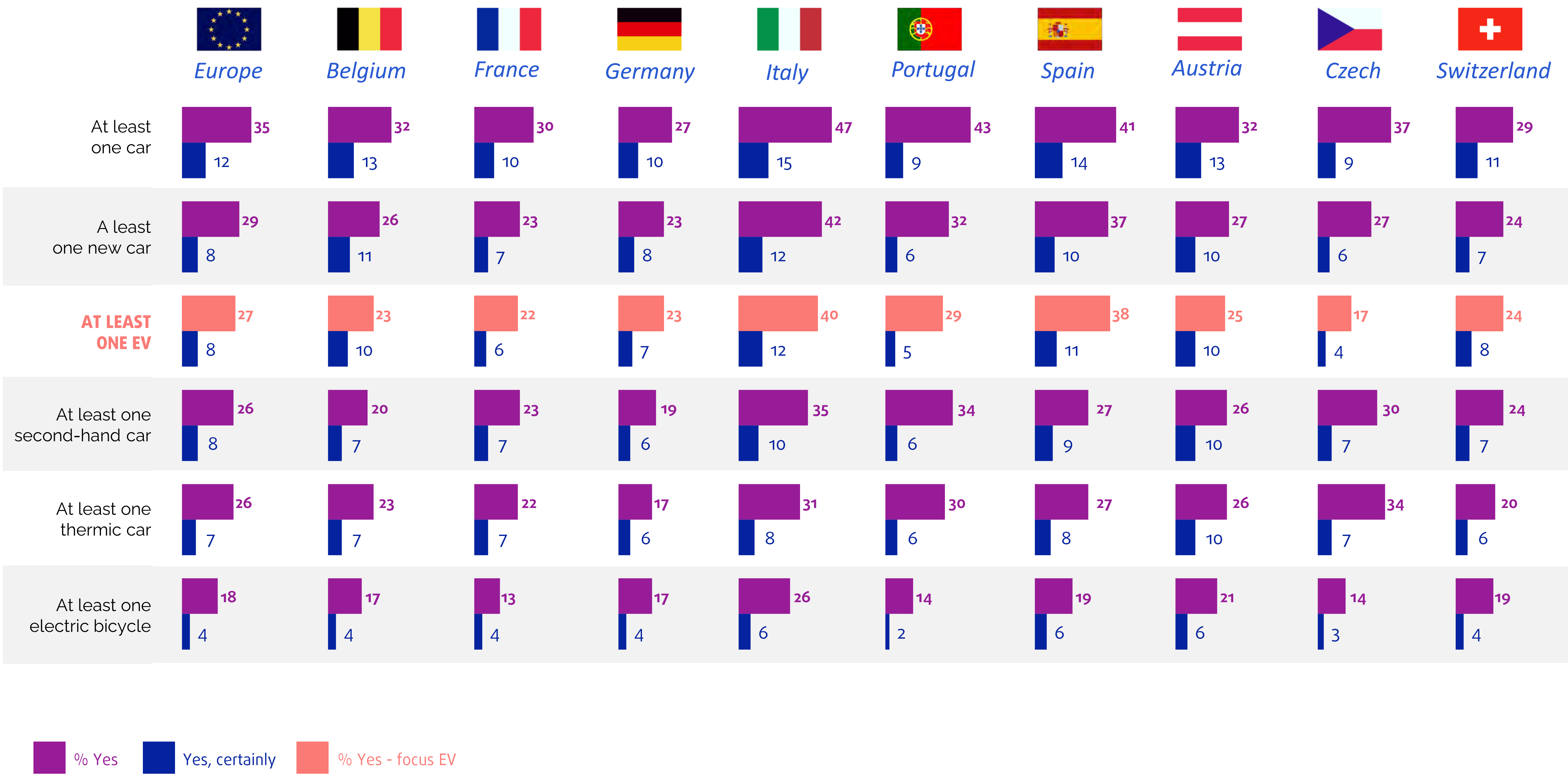
VEHICLES OWNERSHIP & INTENTIONS

Future intention

1 out of 4 Europeans are interested in **EV acquisition**

Q25 - In the next 12 months, do you consider...?

Base: All



Evolutions in points vs previous wave

«EV intentions tend to slightly decrease at a European level.
A specificity in France where car purchase intentions in general strongly decrease»

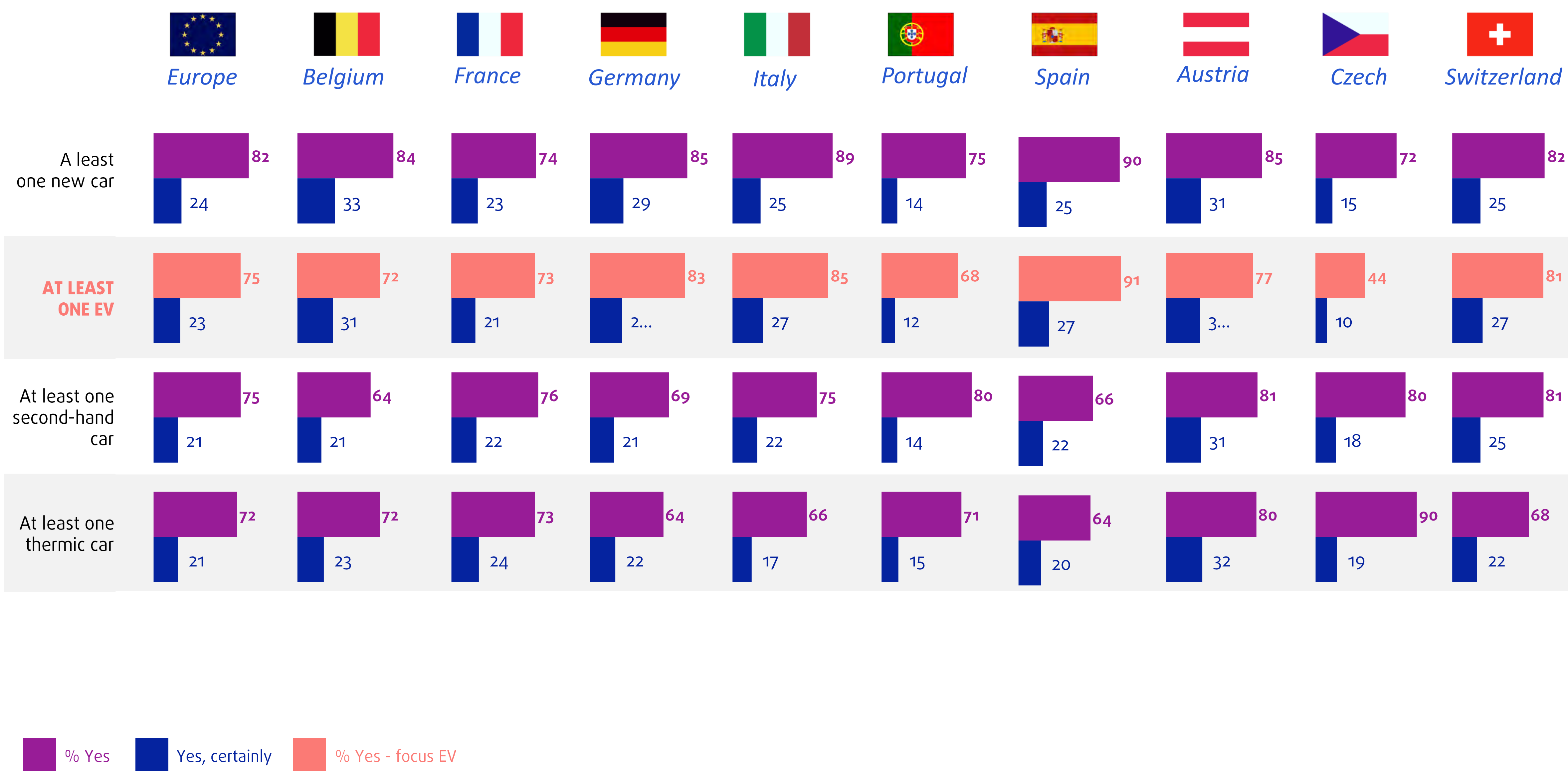
	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
At least one car	**-1**	+1	-10	-2	-1	-2	=	+4	=	-
A least on new car	**-1**	=	-6	-2	-2	-4	+1	+3	-1	-
At least one EV	**-2**	=	-6	-2	-4	-6	+1	+4	=	-
At least one second-hand car	**-1**	-3	-8	-3	=	-1	+1	+4	=	-
At least one thermic car	**-1**	-1	-10	-3	-1	=	+5	+5	=	-
At least one electric bicycle	**-1**	-3	-5	-4	-5	-3	+2	+3	+1	-

% Yes Significantly superior to previous wave Significantly inferior to previous wave

Q25 - In the next 12 months, do you consider…?

Base: Intend to purchase a car

When zooming among car purchase intenders, **EV intentions are still strong**



Evolutions in points vs previous wave

«among car purchase intenders in France,
EV intentions are actually growing»

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
A least one new car	**-1**	+1	+1	-2	-3	-5	+1	-2	-2	-
At least one EV	**-2**	-3	+3	-4	-5	-9	+1	+1	-2	-
At least one second-hand car	**-1**	-10	=	-8	+2	+1	+2	+1	-2	-
At least one thermic car	**=**	-5	-5	-4	-1	+4	+10	+5	-3	-

% Yes Significantly superior to previous wave Significantly inferior to previous wave

Dealerships are quite stable, except in Portugal, and independent garages are growing in Europe, while online is still quite popular

Q26 - Where do you intend to acquire this car?

Base: Intend to purchase a car

	Europe		Belgium		France		Germany		Italy		Portugal		Spain		Austria		Czech		Switzerland	
Manufacturer's dealership	**39**	**-2**	44	+3	52	+2	43	+1	41	-5	33	-9	51	-5	34	-3	21	+4	36	-
Independent garage	**17**	**+2**	18	-1	13	+2	11	+4	26	+5	27	+5	9	+2	11	=	10	=	16	-
NET ONLINE	**21**	**=**	17	-3	16	-3	25	-5	14	=	13	0	20	=	30	+5	30	+1	27	-
Directly from an individual seller (from a classified ad)	**13**	**+1**	9	+1	9	+1	12	-1	9	-2	13	+1	11	+3	18	+5	24	+3	13	-
Online sales from car manufacturer / garages / leasing companies	**11**	**-1**	8	-4	8	-1	12	-5	8	-1	8	-2	14	+1	12	+2	19	+2	10	-
Online marketplace	**10**	**+1**	9	+1	8	-2	13	=	6	+1	5	+2	6	-1	18	+3	11	-1	17	-
I don't know yet	**10**	**=**	12	+1	9	-2	9	+1	10	+2	14	+3	9	=	7	-6	15	-7	7	-
Other	**0**	**-1**	0	-1	1	=	0	=	0	=	0	=	0	=	0	-1	0	-1	1	-

Evolutions in points vs previous wave   Significantly superior to previous wave   Significantly inferior to previous wave

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

To face the current context, **the main changes considered are still speed** and car usage reduction.

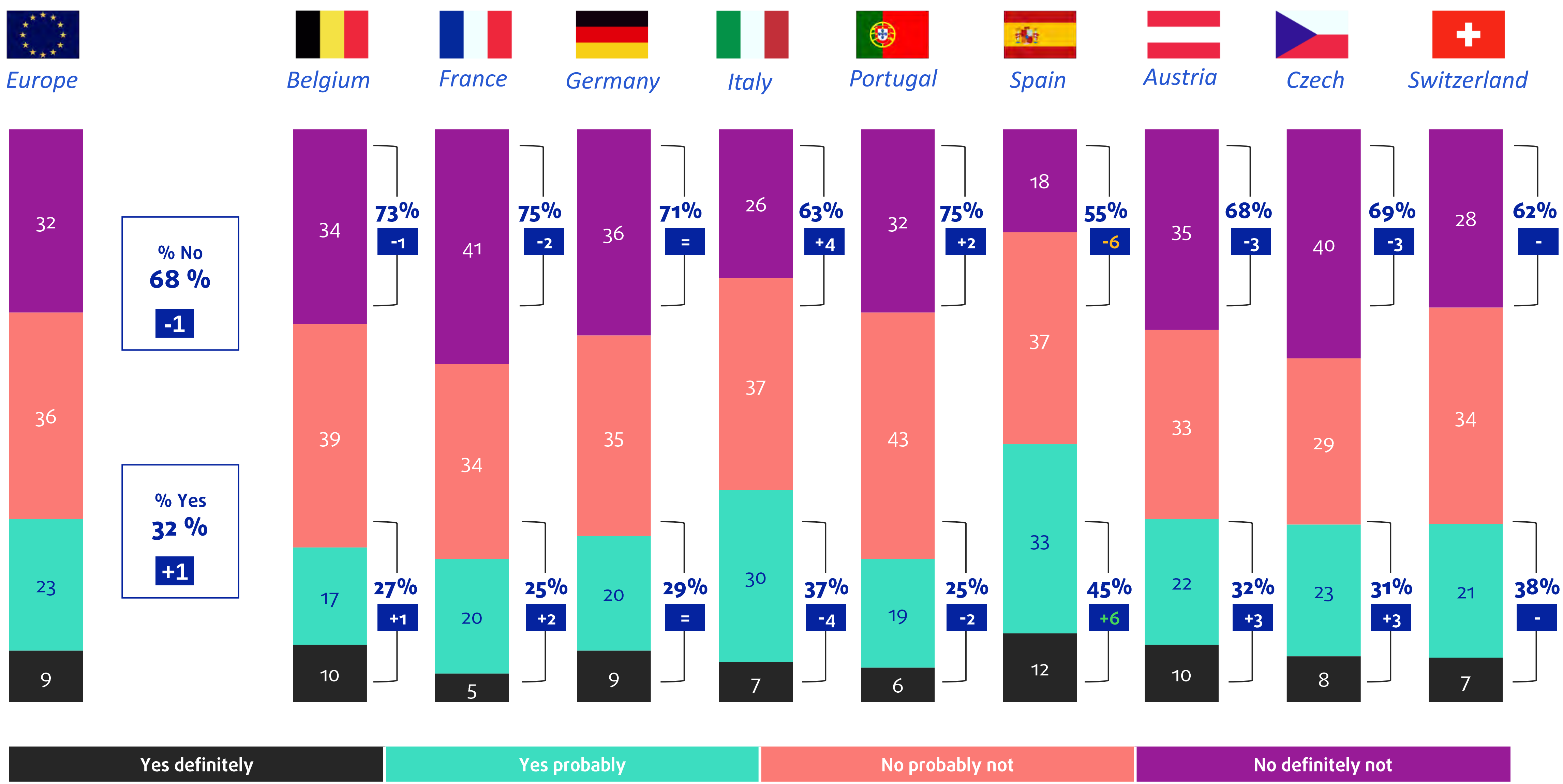
	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
Reducing your speed when driving to save fuel	66 / 19	66 / 23	69 / 22	66 / 23	70 / 19	78 / 22	70 / 19	62 / 18	57 / 14	56 / 13
Reducing your car usage to replace (use alternative modes of transportation)	55 / 14	52 / 15	50 / 15	50 / 12	58 / 14	57 / 12	63 / 18	56 / 14	50 / 11	55 / 14
Postponing non-urgent car repairs / maintenance to save money	39 / 8	31 / 8	39 / 10	37 / 7	50 / 11	39 / 6	45 / 12	41 / 9	32 / 5	40 / 8
Sharing your car for additional revenue	23 / 5	17 / 5	17 / 4	17 / 4	29 / 7	20 / 4	35 / 9	26 / 6	20 / 2	24 / 6

% Yes | Yes, certainly | Most widespread

Q28 - In the future, could you consider no longer having a personal car?

Base: Car owners

Spanish and Italian are still more open to giving up their personal car in the future. While the French, the Portuguese and Belgians stay more attached to it.



Evolutions in points vs previous wave
Significantly superior to previous wave
Significantly inferior to previous wave

KEY LEARNINGS

- ✓ 1 out of 4 Europeans are interested **in EV acquisition, a slight decrease** compared to last year, this trend being stronger in France and Portugal.

- ✓ Specifically in **France**, the **overall car purchase intentions are dropping this year**, which doesn't seem only linked to EV but to the general context / difficulties of the automotive market. Indeed, when zooming among car purchase intenders, EV intentions are actually slightly rising.

- ✓ Purchase channels for future car acquisitions remain quite stable, with still a **high interest in online channels** even if dealership remains the preferred channel overall.

- ✓ When suggesting the idea of stopping to own a personal car, 1 out of 3 Europeans is still ready to do so in the future, even more strongly in Italy, Spain and Switzerland.

02

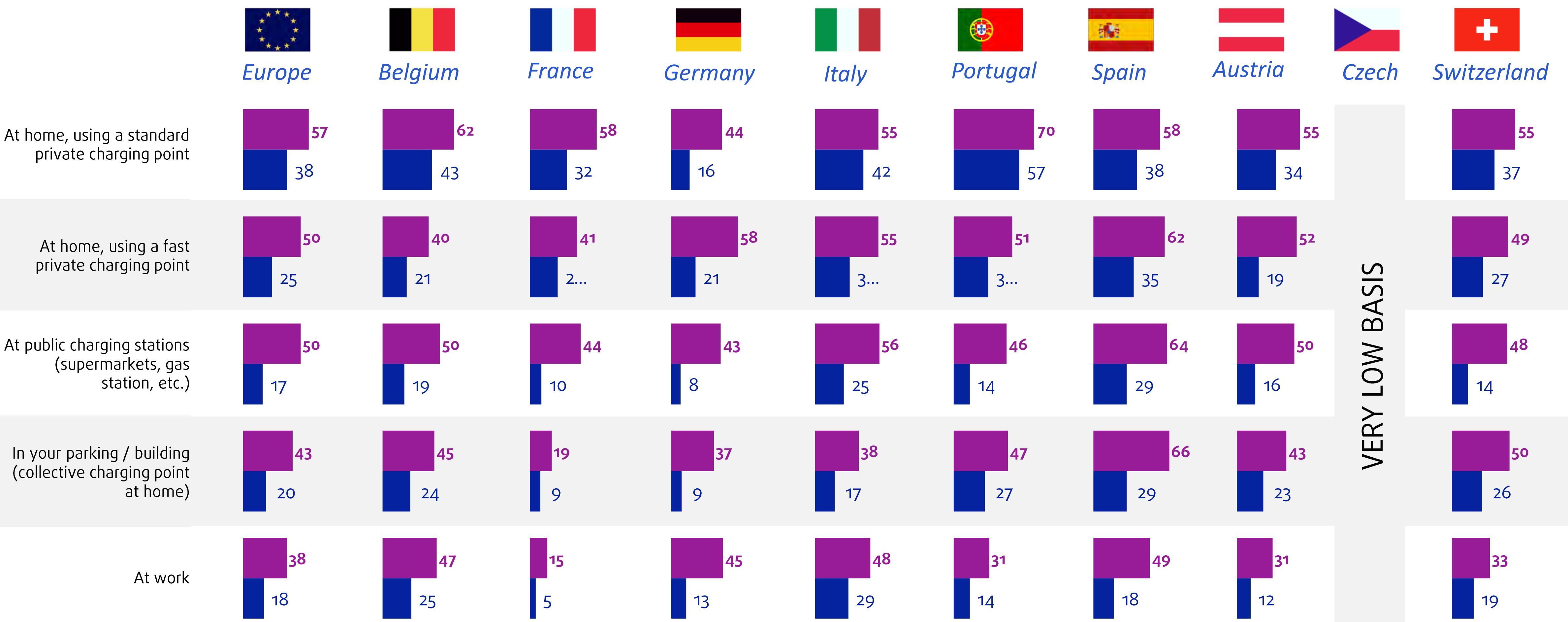
VEHICLES OWNERSHIP & INTENTIONS

Focus EV

V24Q1 - How do you charge your EV most of the time?

Base: EV owners

Private charging points (whether standard or fast) **are the preferred charging modes** among EV owners



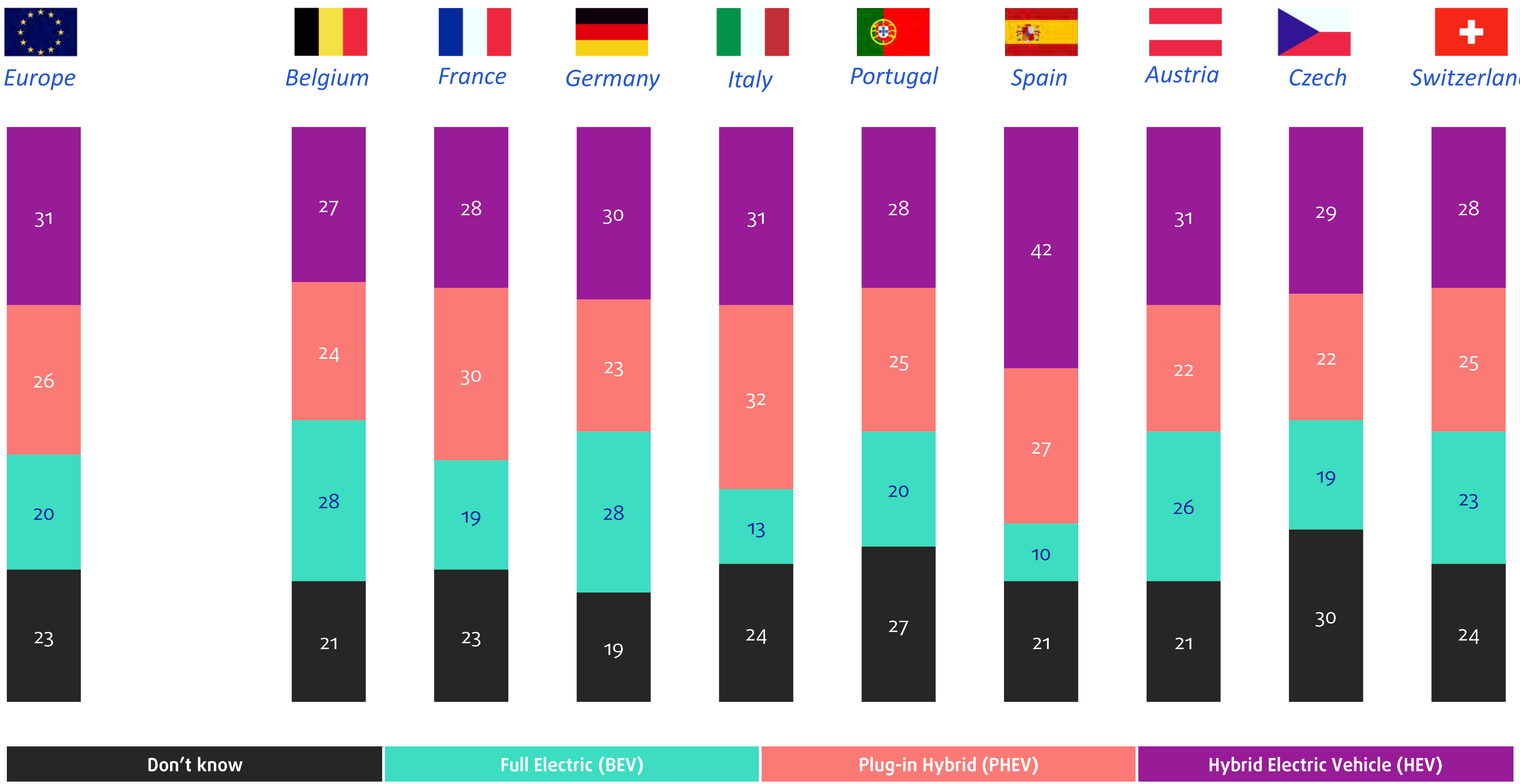
***Warning : low bases between 40 to 60 respondents by country**

% Use it
Daily or multiple times a week

V24Q2 - Specifically, what type of Electric Vehicle car are you considering to buy or lease?

Base: EV Intenders

Hybrid vehicle is the most considered vehicle among EV intenders, especially in Spain. Belgium, Germany and Austria are more open to consider BEV



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

Base: EV intenders

The first reason to buy an EV is still economic (especially in Portugal), closely followed by environmental concerns

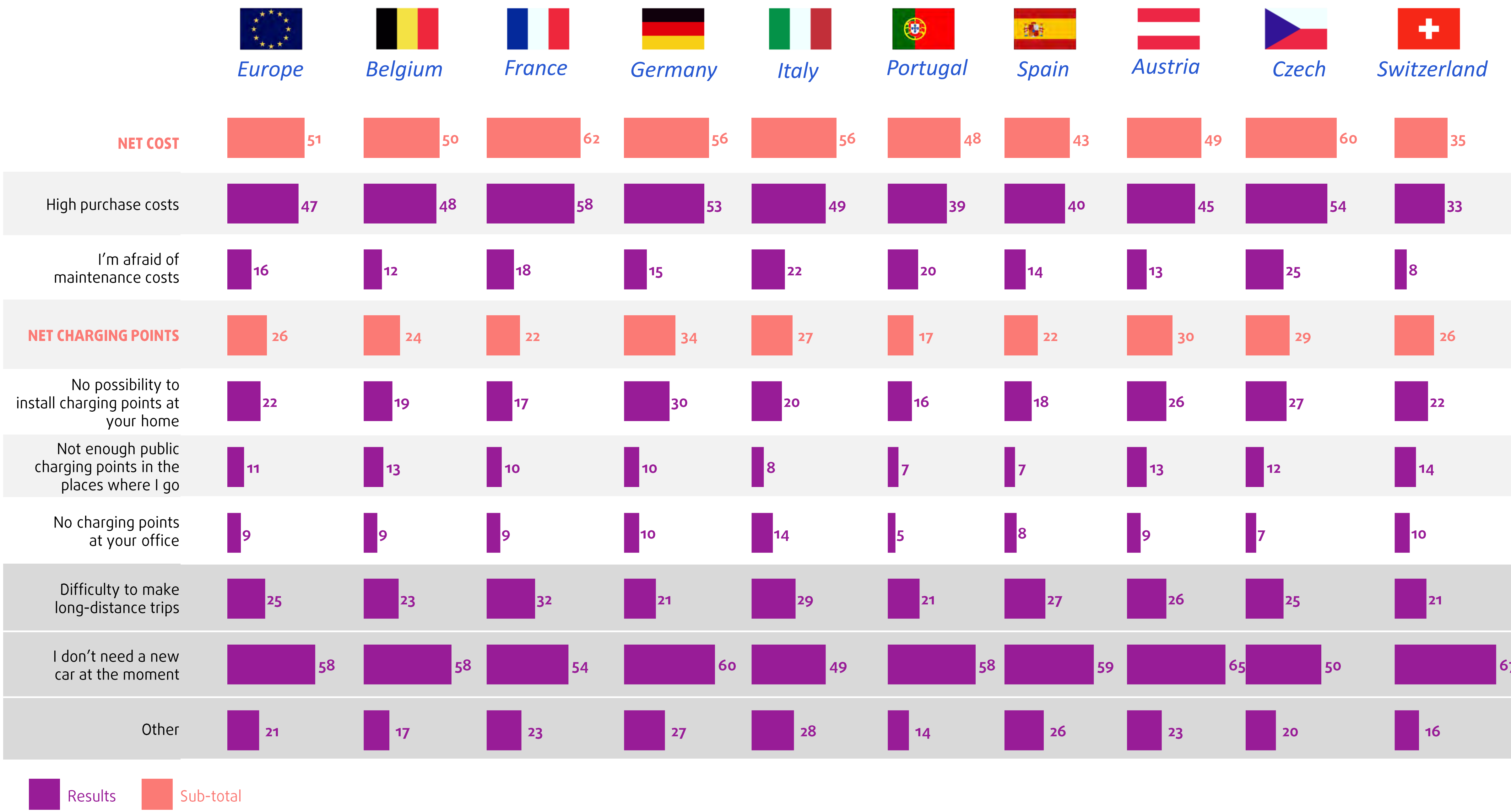
	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
To save money on fuel costs	40	35	46	44	35	56	36	37	34	38
For ecological concerns	35	29	35	39	35	38	34	31	35	40
Because you need a new car and petrol /diesel cars will be less popular in the future	30	30	26	29	33	27	34	28	29	29
Government incentives to buy or lease electric vehicle	22	23	17	26	25	24	20	27	10	17
Increased availability of charging stations	20	16	20	25	19	15	23	21	16	26
Because it will be mandatory in some areas	19	28	23	15	18	9	25	14	16	17
Because you like a specific model	19	20	20	22	12	15	19	22	20	21
Other reasons	2	2	3	2	1	1	2	1	1	3

Results

Q29 - What are the main reasons why you don’t consider buying an Electric Vehicle ?

Base: Non considers of EV

Purchase cost remains the main barrier to buy an EV



Evolutions in points vs previous wave

«Compared to last year, the general trend in Europe **is a decrease of new car intention** (not PARTICULARLY EV).»

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
NET Cost	-6	-11	-6	-3	-1	-12	-6	-6	-1	-
High purchase costs	-6	-10	-7	-3	-2	-14	-4	-8	-2	
I'm afraid of maintenance costs	-2	-5	+1	-1	+1	-4	-1	-2	-1	
NET Charging points	-3	-3	-7	-1	-4	-3	-7	-2	+2	-
No possibility to install charging points at your home	-2	-4	-5	-2	-2	-1	-7	-3	+3	-
Not enough public charging points in the places where I go	-1	=	-3	-3	+1	+1	-1	=	-2	-
No charging points at your office	=	-1	-5	=	+1	-1	+1	=	+1	-
Difficulty to make long-distance trips	-4	-6	-7	-6	=	-5	-2	-4	-2	-
I don't need a new car at the moment	+8	+6	+12	+7	+6	+9	+7	+9	+3	-
Other	-5	-7	-5	-7	+5	-2	-8	-4	-6	-

Significantly superior to previous wave

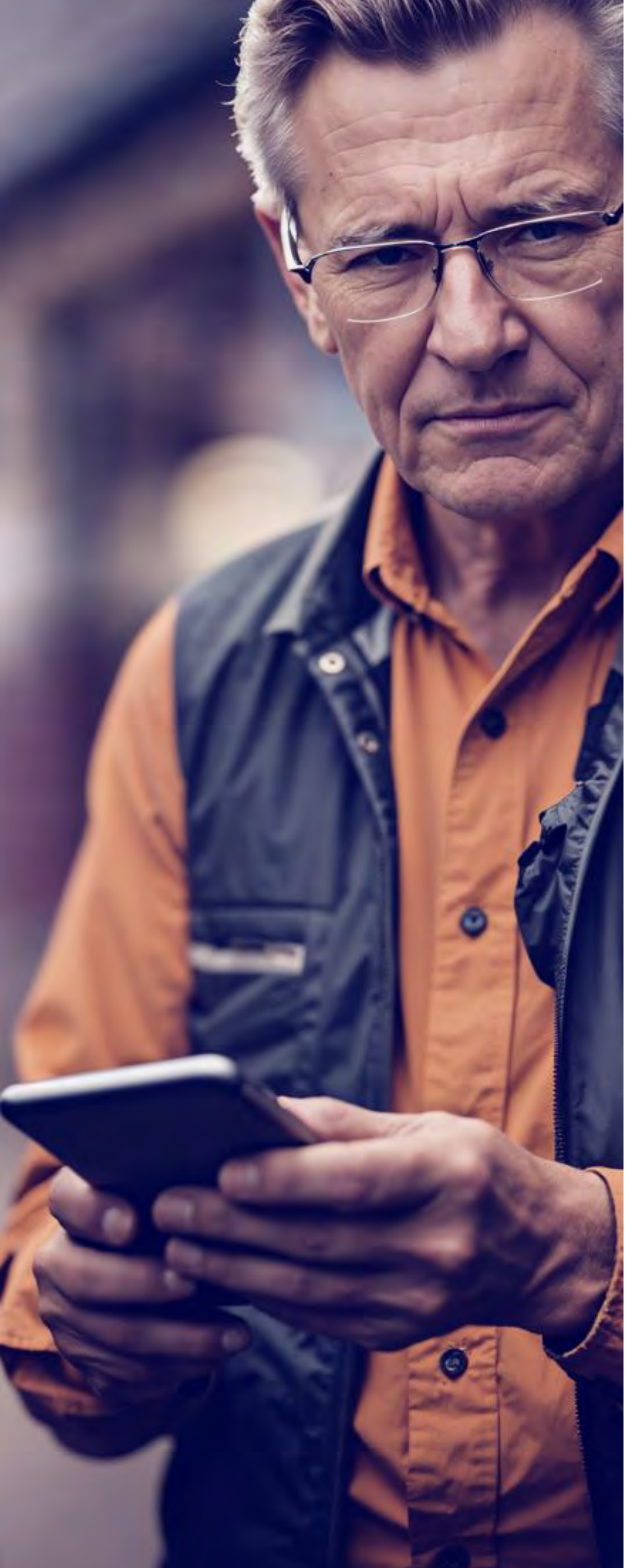
Significantly inferior to previous wave

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 Non considers of EV

Charging stations mapping and EV roadside assistance are the first services that could support the most EV usage.

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
#1	Charging stations mapping **58%**	EV Roadside assistance **59%**	Wallbox at home assistance **60%**	Charging stations mapping **66%**	EV Roadside assistance **65%**	EV Roadside assistance **62%**	EV Roadside assistance **65%**	Charging stations mapping **65%**	Charging stations mapping **57%**	Charging stations mapping **61%**
2024	#1	#2	#1	#1	#1	#1	#1	#1	#1	-
#2	EV Roadside assistance **54%**	Charging stations mapping **55%**	Holiday Swap **54%**	Wallbox at home assistance **63%**	Charging stations mapping **61%**	Charging stations mapping **50%**	Charging stations mapping **59%**	Mapping of garages **52%**	EV Roadside assistance **53%**	Wallbox at home assistance **52%**
2024	#2	#1	#3	#2	#2	#2	#2	#2	#2	-
#3	Mapping of garages **47%**	Holiday Swap **41%**	EV Roadside assistance **50%**	Mapping of garages **56%**	Mapping of garages **49%**	Mapping of garages **46%**	Mapping of garages **53%**	Wallbox at home assistance **50%**	Mapping of garages **52%**	EV Roadside assistance **48%**
2024	#3	#5	#2	#3	#3	#3	#3	#3	#3	-



KEY LEARNINGS

- ✓ Current EV owners tend to use mainly **private charging stations at home, whether they are standard or fast.** Public charging points are also quite widespread even is usage is less intense than home stations.

- ✓ **EV considerers tend to be more inclined to choose hybrid than a full BEV** : only 20% of them would go for full electric. Belgium, Germany and Austria are more open to consider BEV.

- ✓ The **motivations** to consider an EV are both **economic** (save on fuel costs) and **environmental** : both reasons are quite close to each other.

- ✓ **Barriers**, on the other hand, are more concentrated on **purchase costs.**

- ✓ In terms of services that could support usage or EV consideration, **charging stations mapping** remains the preferred service, followed by EV roadside assistance.

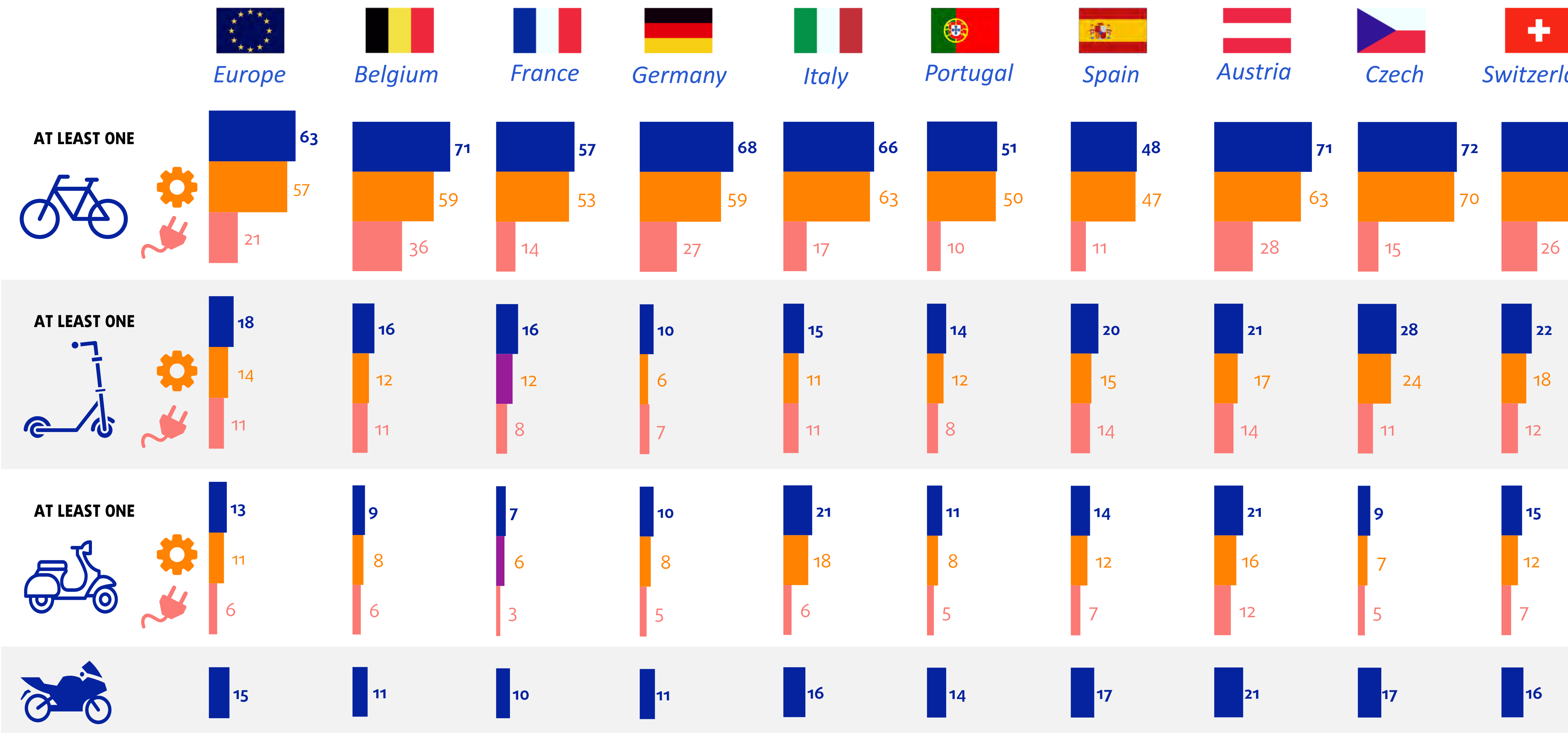
03

MICRO MOBILITY

Q13 - Do you own in your household one or several...

Base: All

6 Europeans out of 10 declare owning a bicycle, mostly standard ones



At least one - % Standard Electric

Evolutions in points vs previous wave

«**Bicycle ownersip is stable in europe,** except in Austria where electric bikes are increasing.»

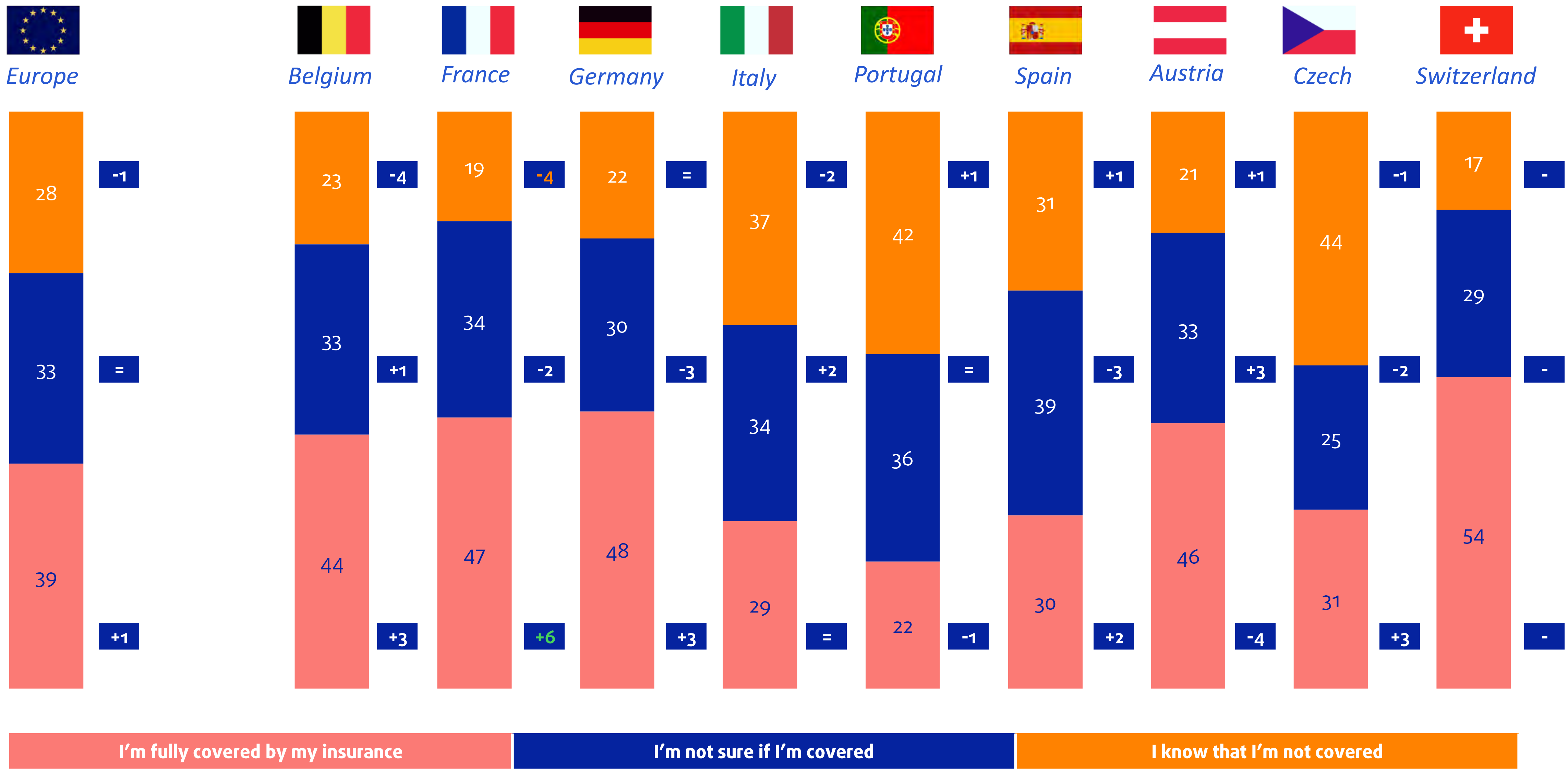
	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
At least one	+1	-1	+3	1	=	-1	+2	+1	+3	-
	+1	-1	+3	=	=	-1	+3	=	+4	
	+1	=	-2	2	-3	=	=	+4	+1	
At least one	-1	-1	-2	-3	-1	-1	+4	=	+2	-
	=	-2	-1	-4	-2	-1	+4	=	+1	-
	=	=	-3	-3	-2	-1	+2	+2	=	-
At least one	-1	-3	-3	-4	-3	=	+2	+5	=	-
	-1	-2	-3	-5	-3	-2	+2	+3	-1	-
	-1	-2	-3	-3	-4	-1	+1	+4	+1	-
	+1	-2	=	-3	-2	+1	+1	+5	+3	-

Significantly superior to previous wave Significantly inferior to previous wave

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

One-third of users assert they have full coverage for their bicycle or scooter (much higher in Switzerland), a rate rising this year in France.



Evolutions in points vs previous wave | Significantly superior to previous wave | Significantly inferior to previous wave

BICYCLE ASSISTANCE INTEREST %

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 a half of bike owners would consider an insurance or assistance, mainly to be assisted in case of accident

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
AT LEAST ONE CONTRACT	**57**	**54**	**36**	**56**	**67**	**55**	**69**	**62**	**51**	**62**
An assistance	**8**	10	3	4	10	9	14	8	5	7
An insurance	**27**	21	18	35	24	23	29	35	25	35
Both	**22**	23	15	17	33	23	26	19	21	20
None	**43**	46	64	44	33	45	31	38	49	38

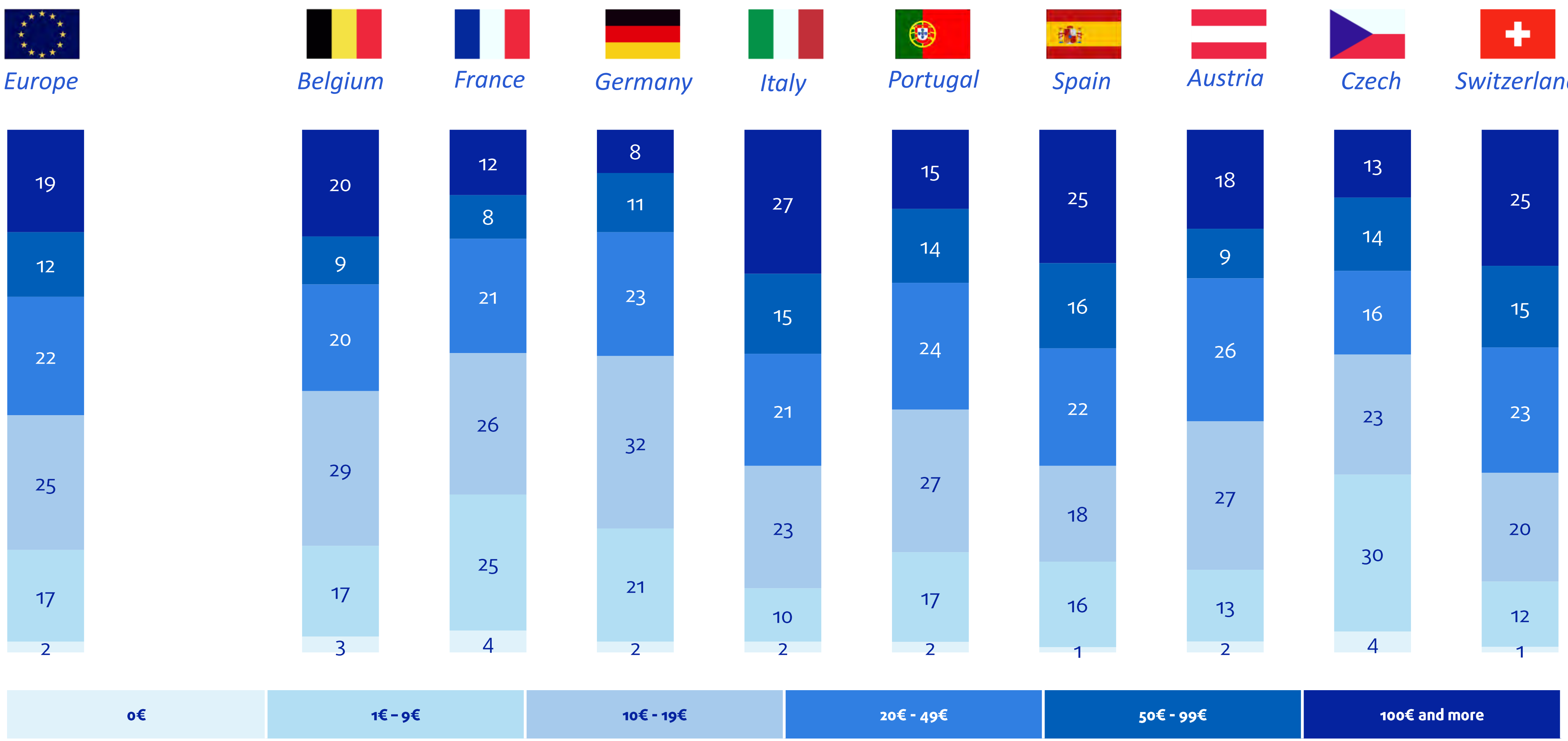
REASONS FOR INTEREST %

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
You want to be assisted in case of accident/breakdown	**33**	43	22	26	44	43	36	29	29	27
The price of your bicycle	**27**	22	34	30	22	20	19	28	38	31
The fact that it's a new one	**20**	20	24	23	17	16	19	24	13	21
You want a cover to restore your mobility if interrupted	**19**	14	19	19	17	20	24	19	18	20
Other	**1**	1	1	2	0	1	2	0	2	1

V24Q3 - How much would you be willing to pay for a bicycle assistance (help in case of breakdown/accident) /insurance (financial compensation in case of damage/theft)?

Base: Bicycle owners interested in assistance

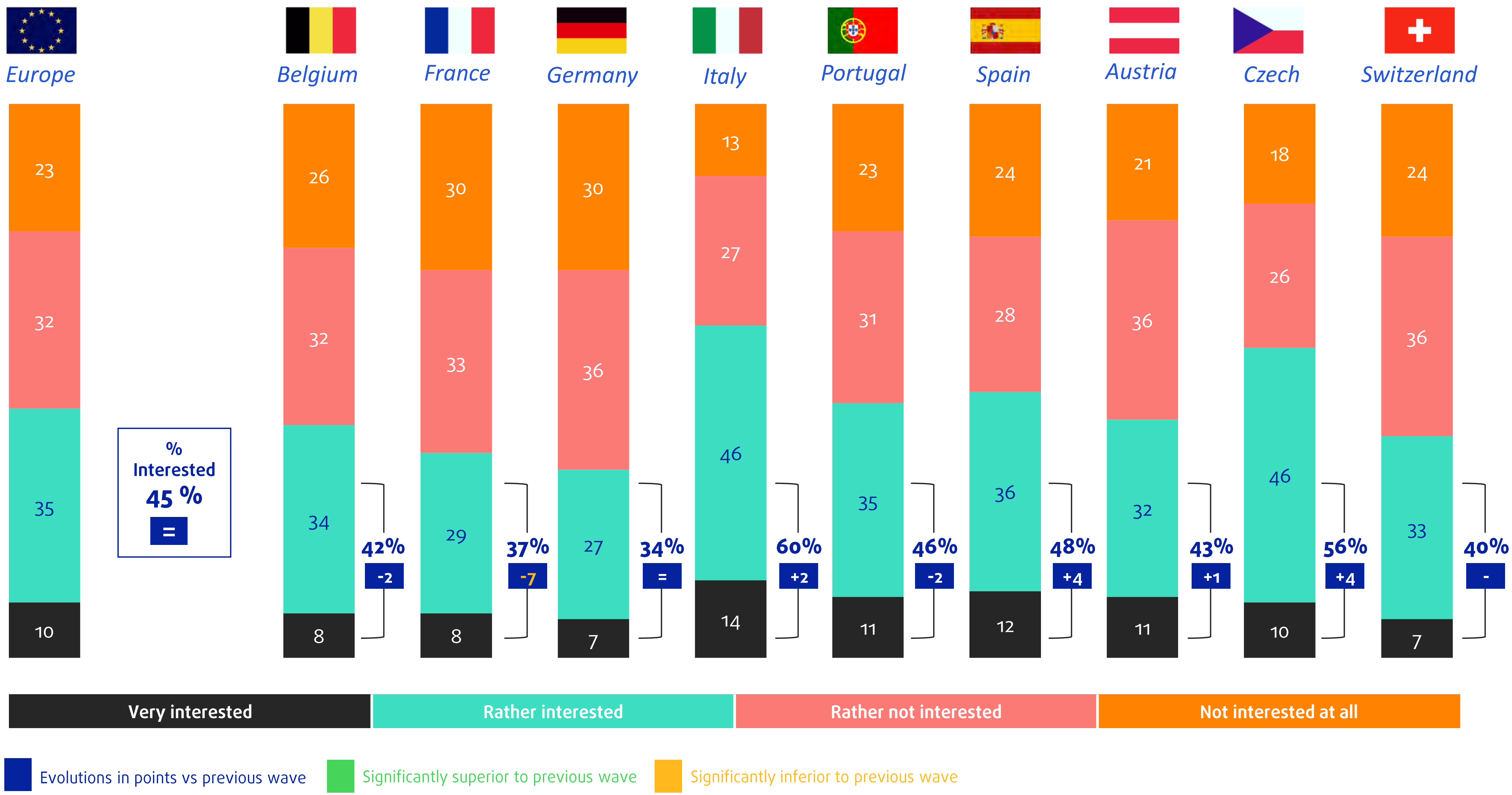
The majority of bicycle owners who are interested in assistance would be willing to pay between 10 and 50€ per month



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: Car owners

The interest for person-based insurance is stable at a European level, however decreasing in France



KEY LEARNINGS

- ✓ The **majority of Europeans say they own a personal bicycle**, especially in some countries such as the Czech Republic, Austria and Italy.

- ✓ **Electric bikes ownership is quite heterogeneous among countries :** from 11% in Spain to 36% in Belgium, with an average of 21% in Europe (+ 1 point compared to last year).

- ✓ **More than a third of Europeans** think that they are **properly insured when using micro-mobility devices or bicycles**, this figure growing this year in France. Switzerland shows the highest rate of all countries on this topic.

- ✓ **The potential for bicycle assistance or insurance remains high :** more than a half of bike owners would consider an insurance or assistance, mainly to be assisted in case of accident. The majority of those who are interested would be willing to pay between 10 and 50€ per month for this service.

- ✓ Finally, the **interest for a person-based insurance stays quite solid with almost half of Europeans interested** – a figure stable overall, yet decreasing in France.

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