

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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01

MOBILITY HABITS IN EUROPE

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02

VEHICLES OWNERSHIP AND INTENTIONS

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03

MICRO MOBILITY **59**



01

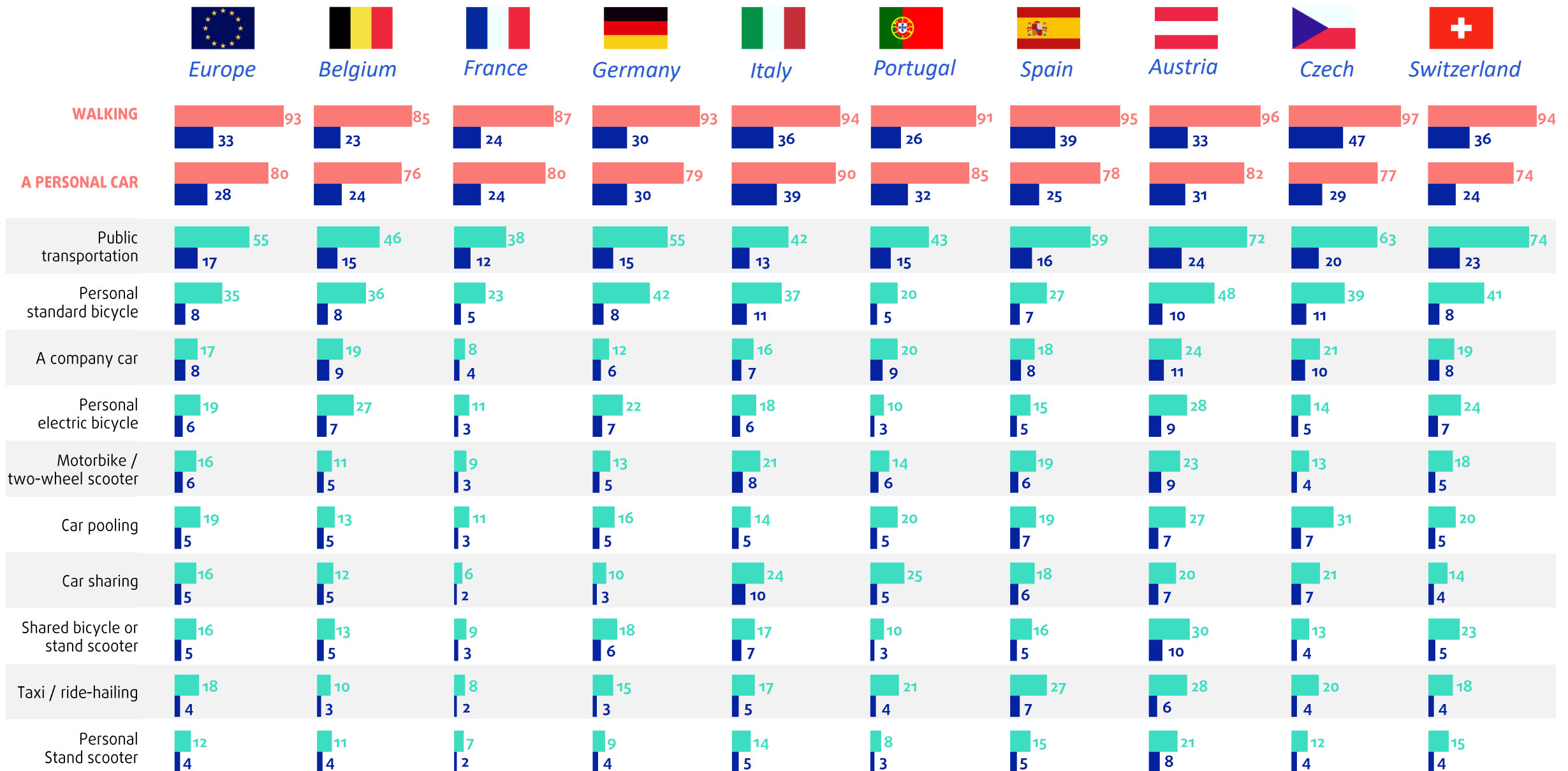
MOBILITY HABITS IN EUROPE

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



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

Evolutions
in points vs
previous
wave

										
	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

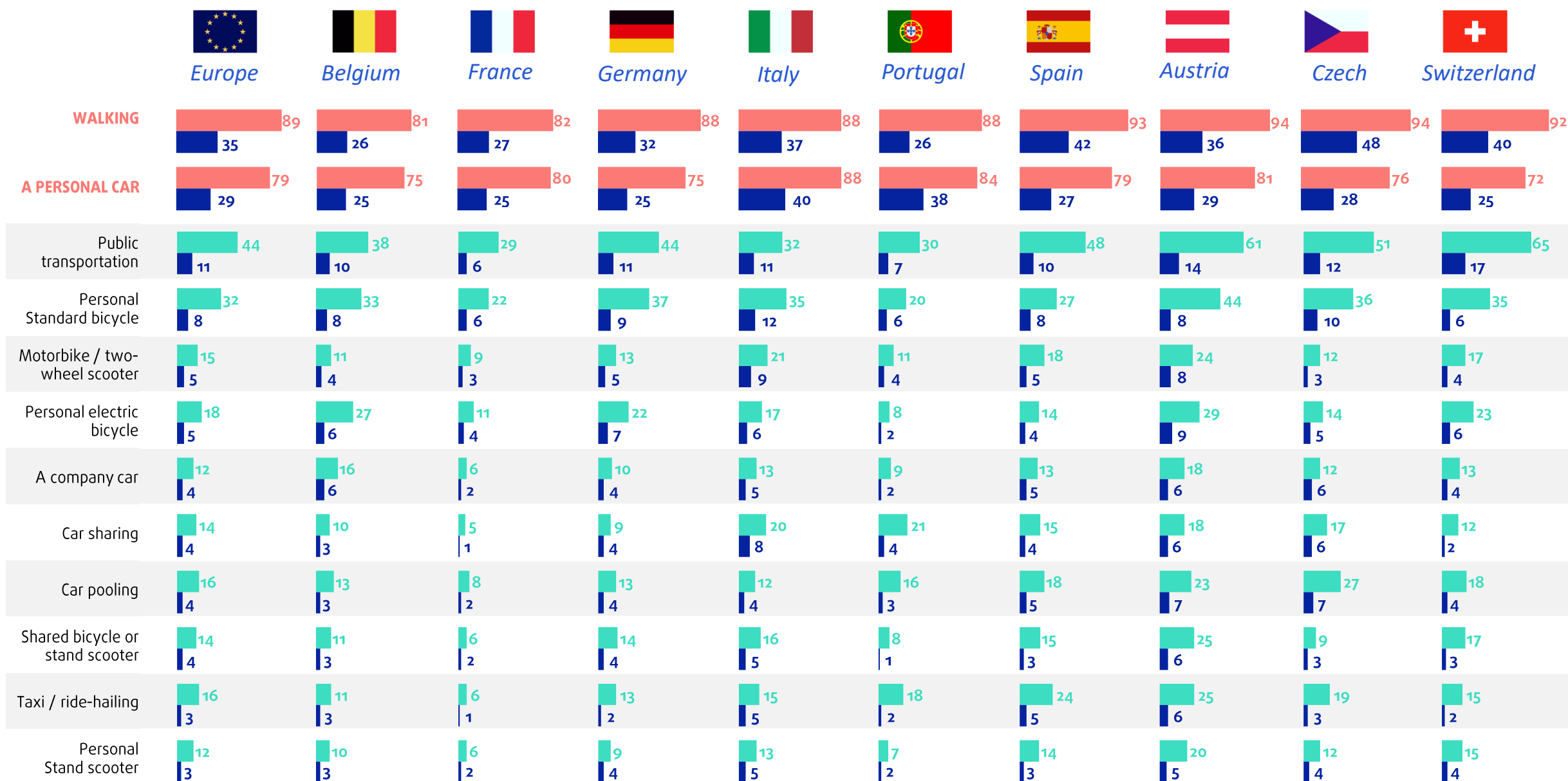


Significantly inferior to previous wave

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



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



**Evolutions
in points vs
previous
wave**

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

	 <i>Europe</i>	 <i>Belgium</i>	 <i>France</i>	 <i>Germany</i>	 <i>Italy</i>	 <i>Portugal</i>	 <i>Spain</i>	 <i>Austria</i>	 <i>Czech</i>	 <i>Switzerland</i>
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

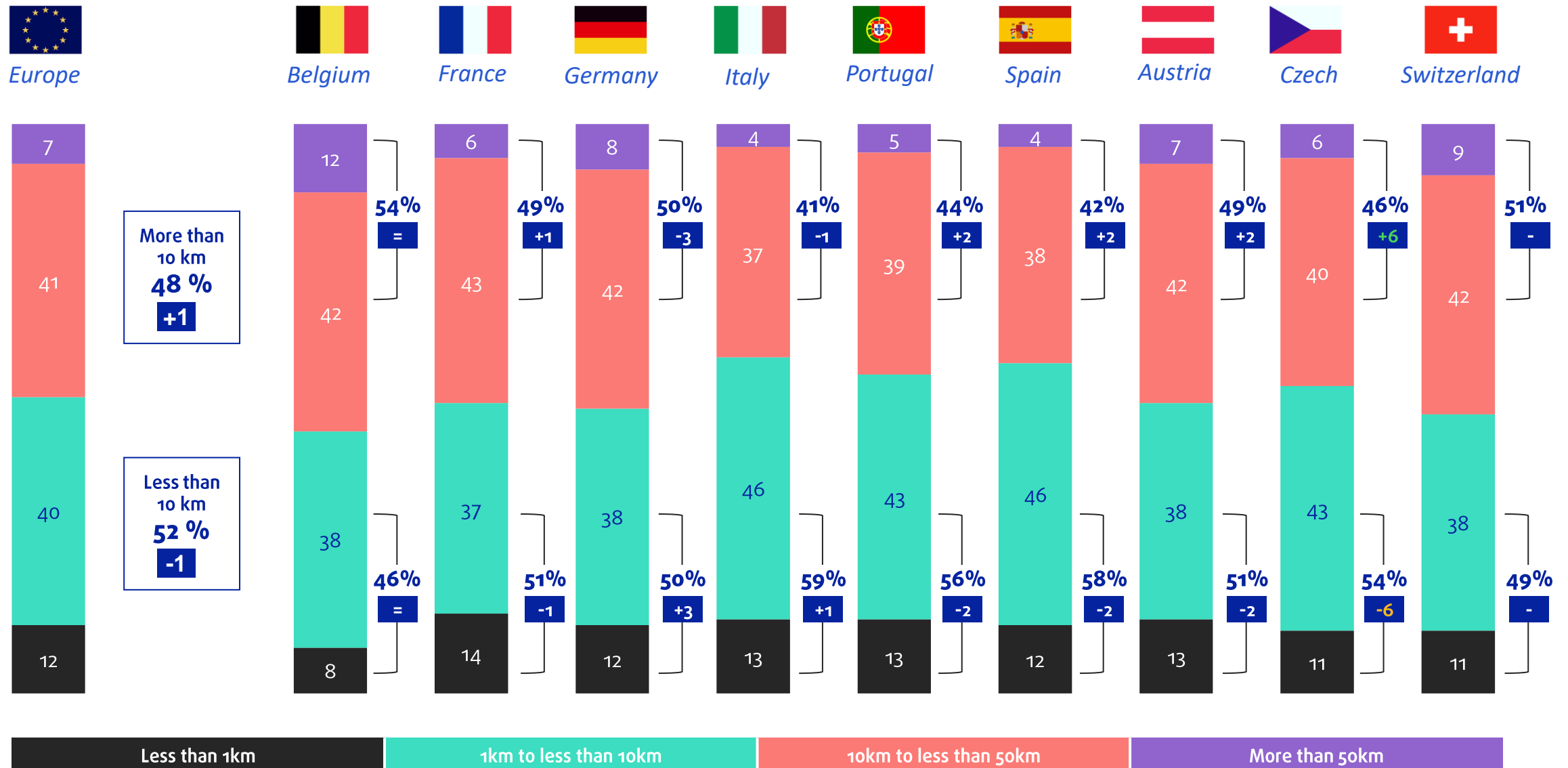
Overall, **no major evolution in main mobility habits**, except some slight evolutions mainly in France and Austria

										
	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 -

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



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

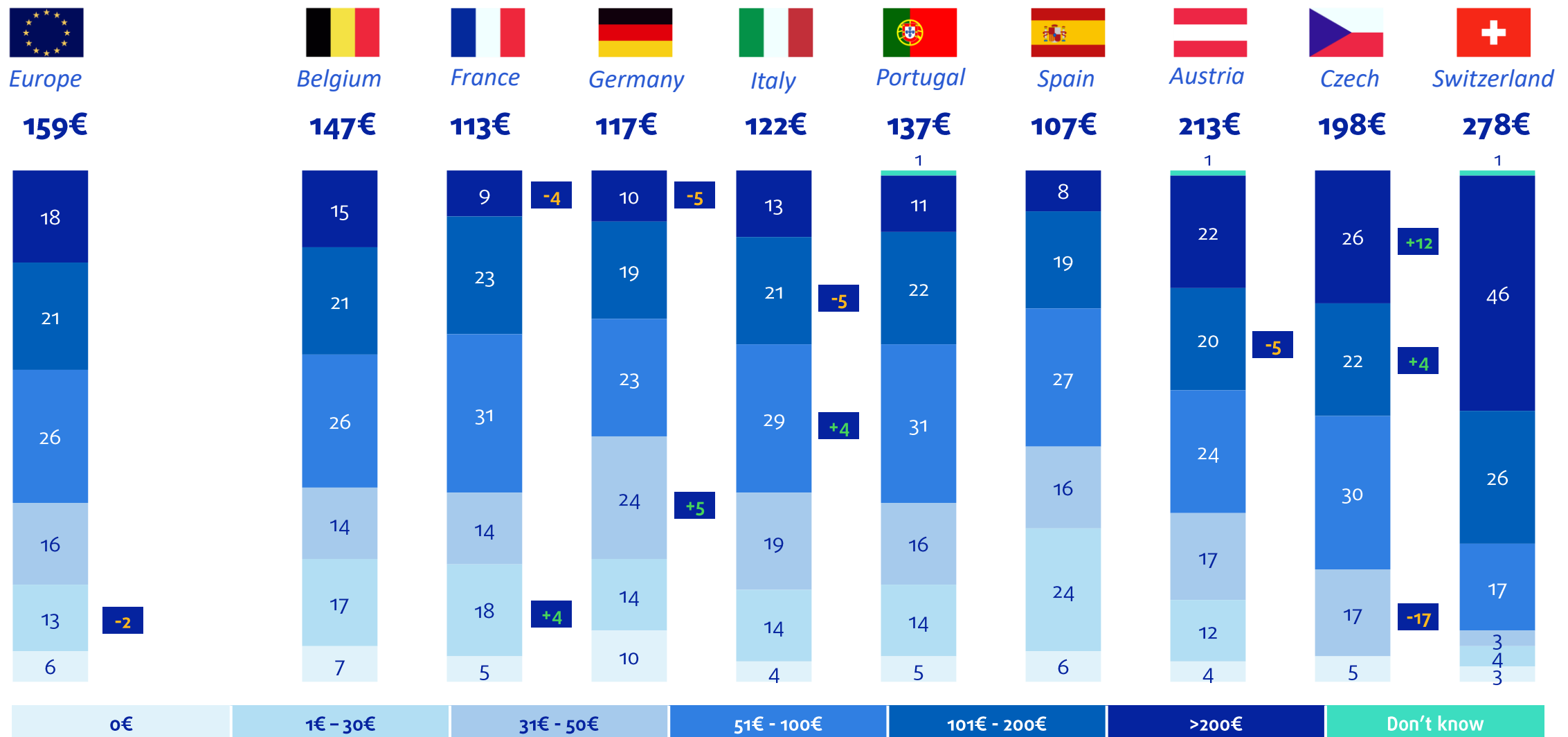


*Average excluding "I never work from home"

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

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%

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%

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

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
#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

	Europe	Belgium	France	Germany	Italy	Portugal	Spain	Austria	Czech	Switzerland
#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.



Europe



Belgium



France



Germany



Italy



Portugal



Spain



Austria



Czech



Switzerland

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%



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



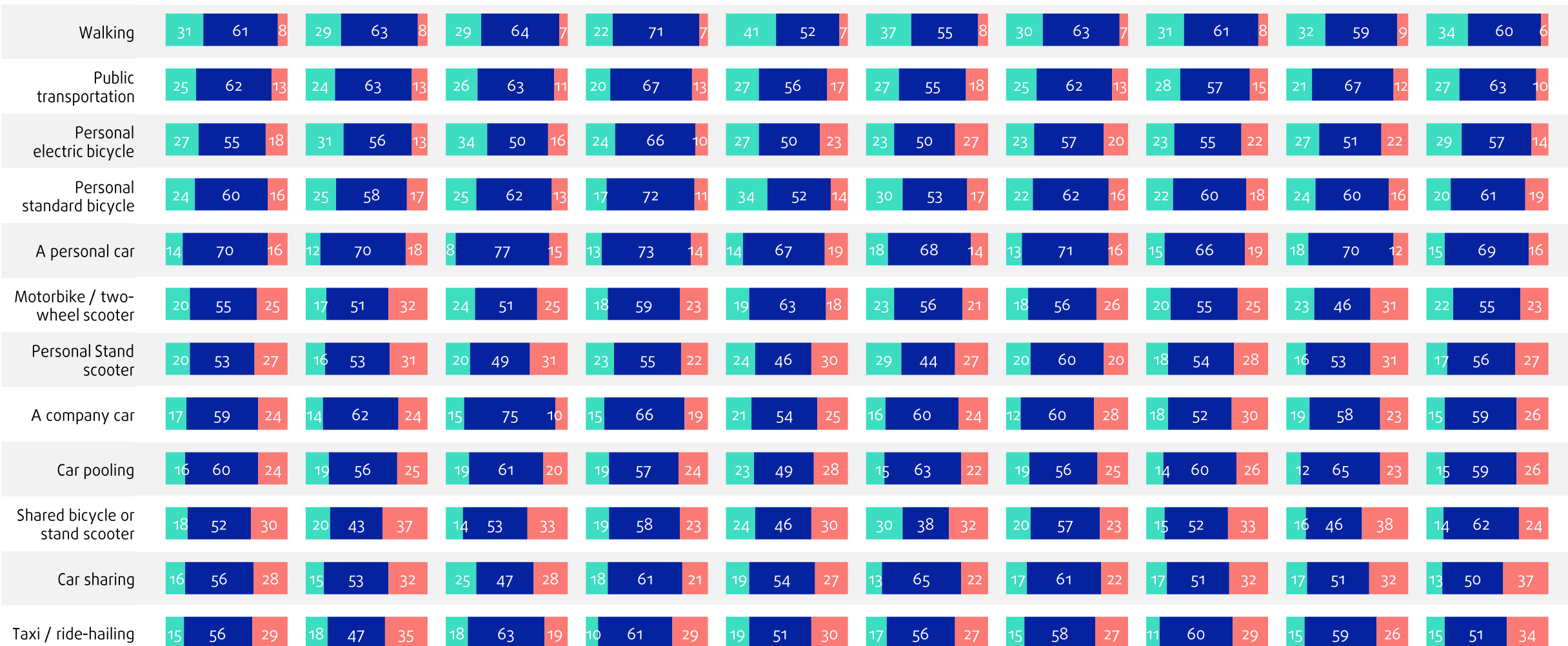
Austria



Czech



Switzerland





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

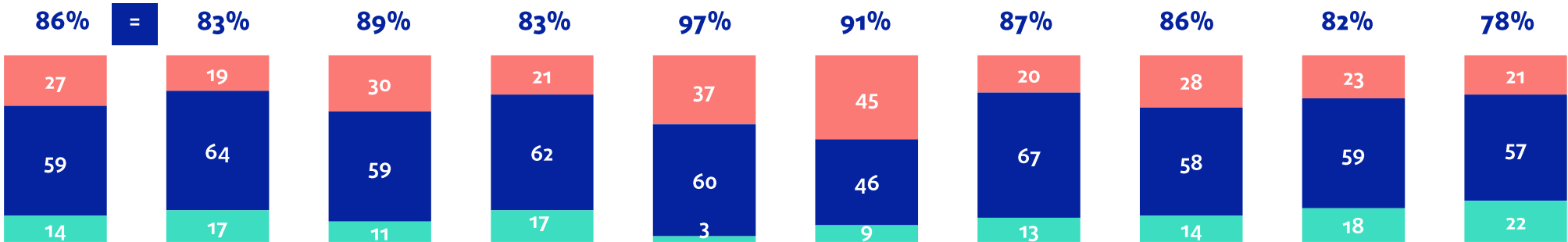
Personal car ownership stays widespread in Europe



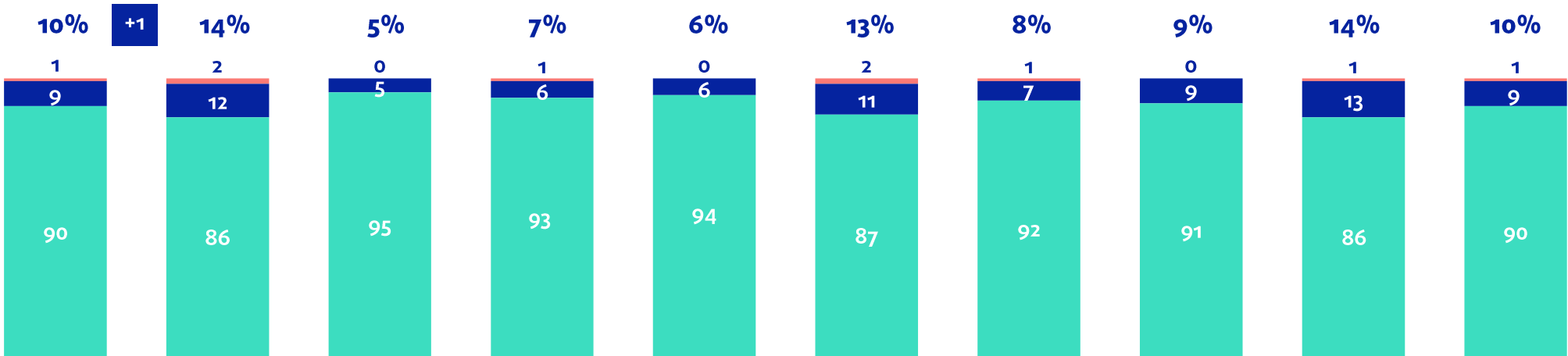
At least one personal or company car



AT LEAST ONE PERSONAL CAR



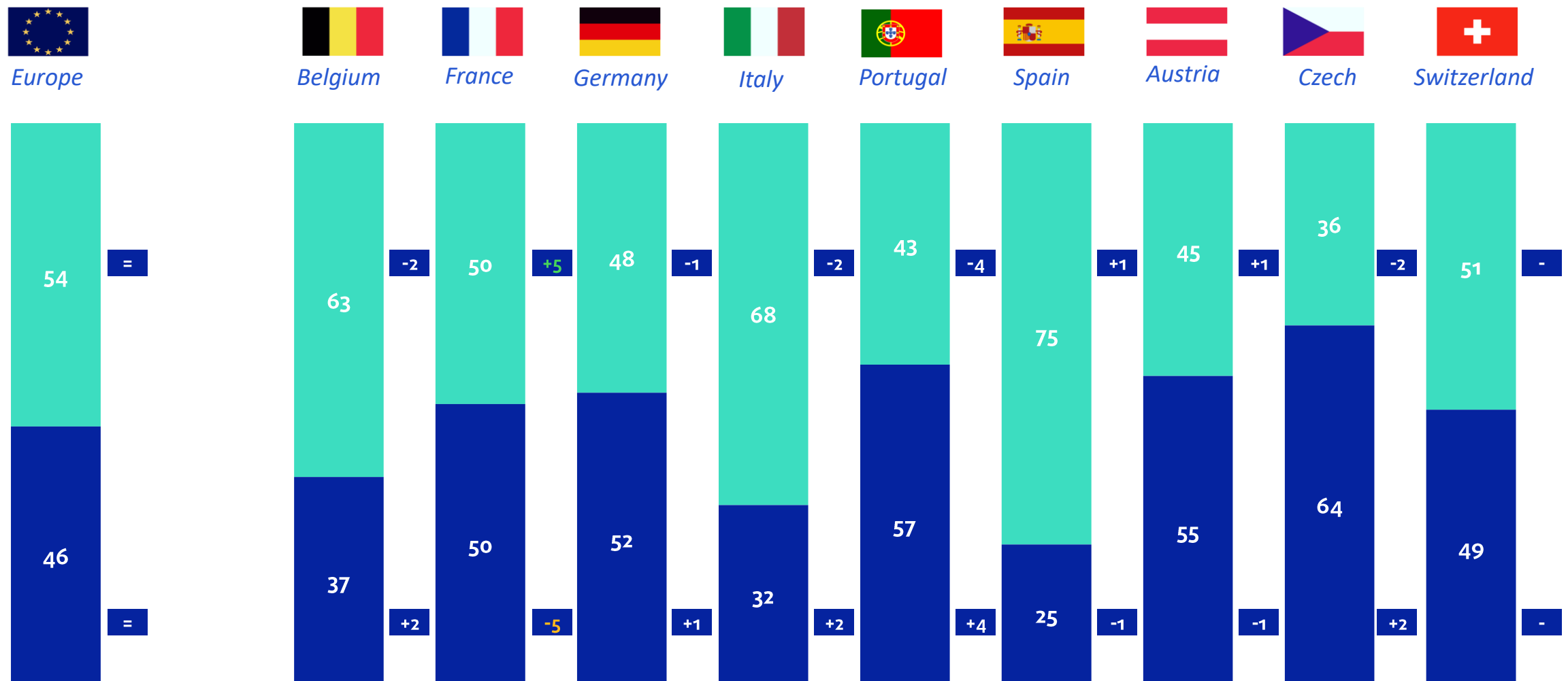
AT LEAST ONE COMPANY CAR



Q14B - Was this car bought new or used?

Base: Car Owners

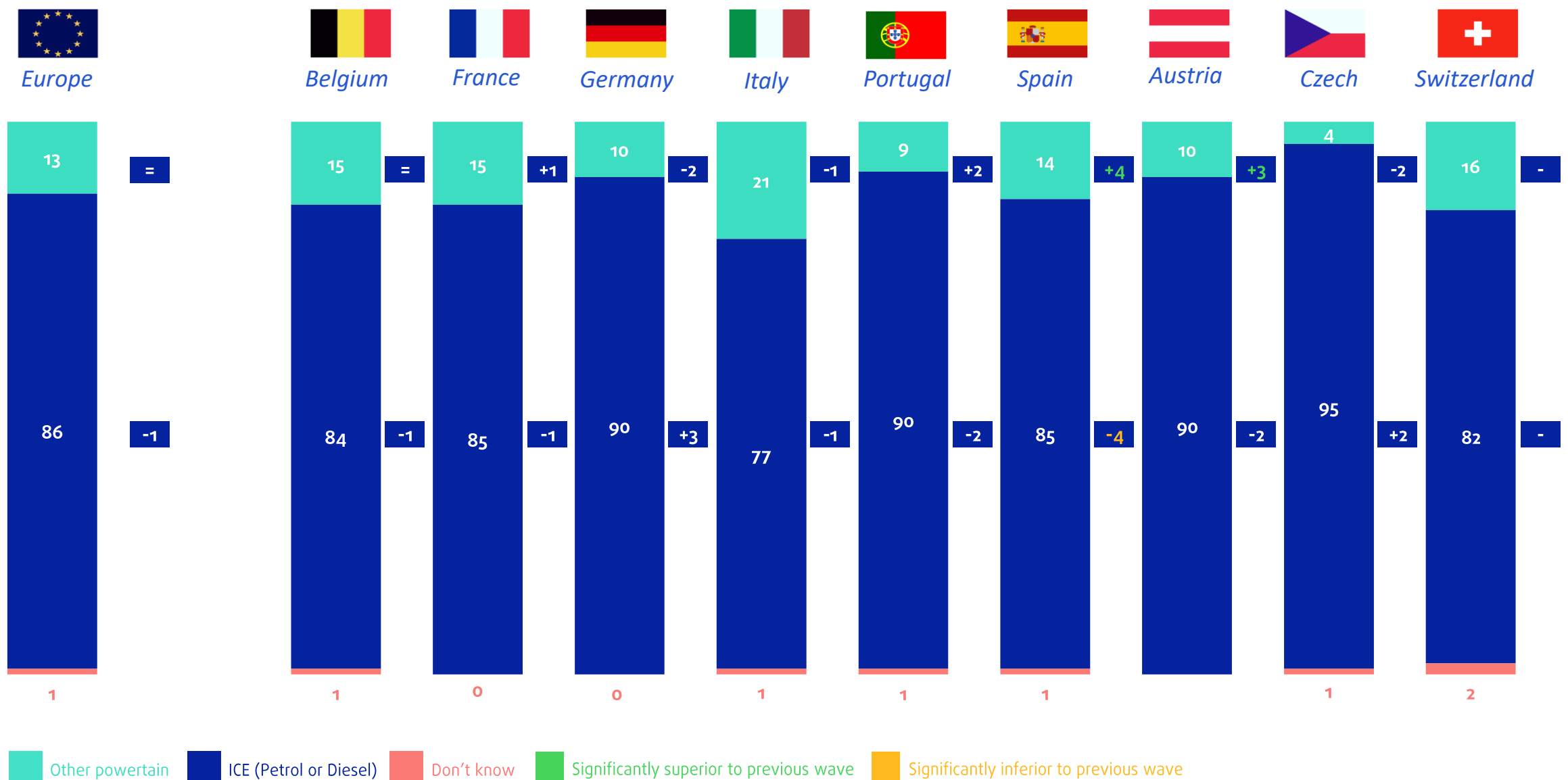
Europeans keep using new and old cars in almost equal proportions overall, with differences by country (Belgium, Italy and Spain having a majority of new vehicles)



Q16 - What is the powertrain of this car?

Base: Car Owners

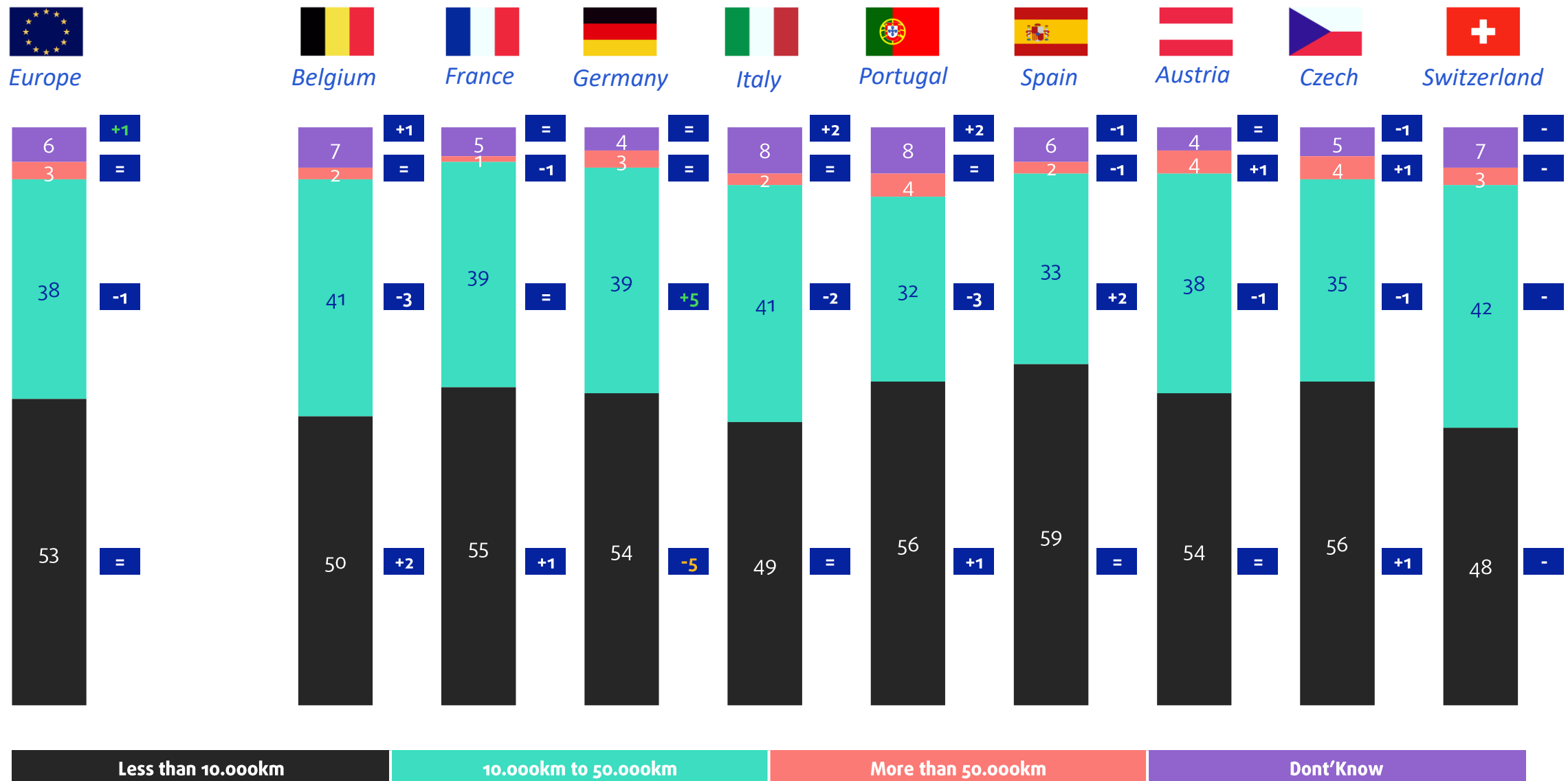
Ice-vehicles are still the majority with same level as the previous year. Other powertrains are progressing in Spain and Austria, and already quite present in Switzerland.



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.



Q16 - What is the powertrain of this car?

Base: Car Owners



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

										
	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 -

Q19 - How did you acquire this car?

Base: Personal cars owners











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

																				
	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	-

Q21 - Where did you acquire this car?

Base: Personal cars owners

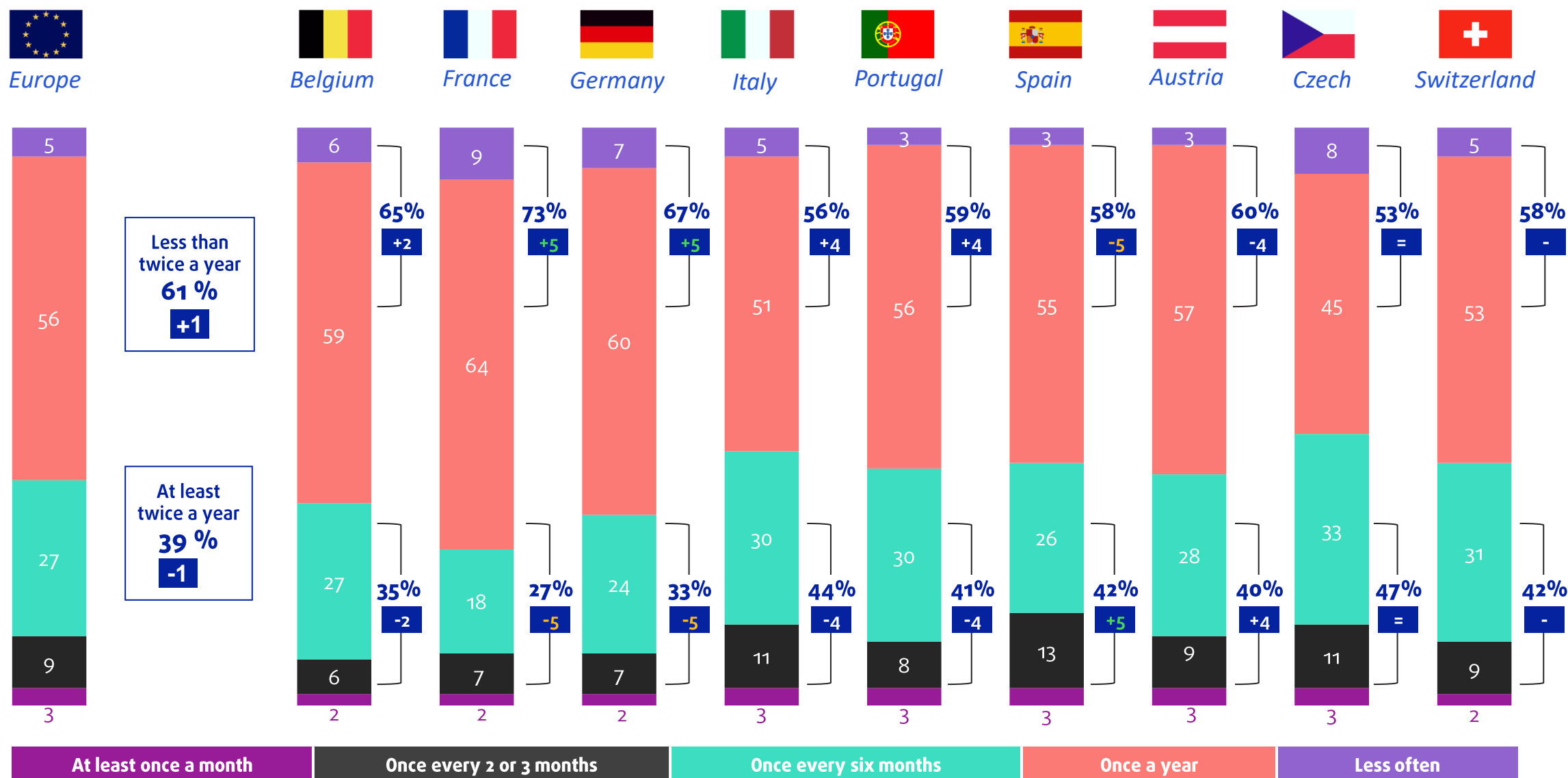
In Czech Republic, dealerships are much less popular than in other countries, whereas individual sellers and online sales are more spread.

										
	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 -

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

Base: Car owners

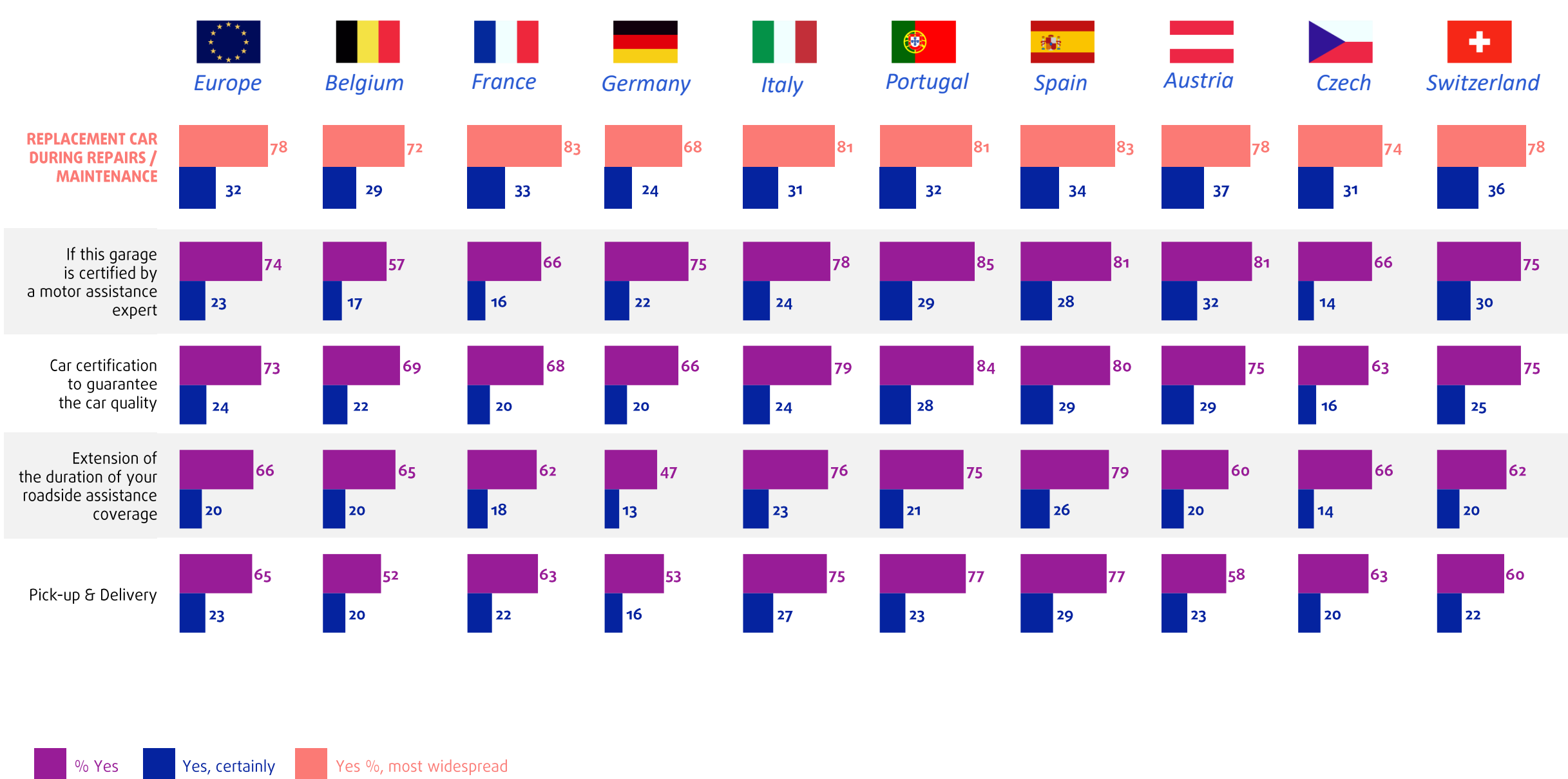
4 out of 10 respondents keep seeing a professional for car maintenance at least twice a year - **an even higher frequency in Czech Republic and Italy.**



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

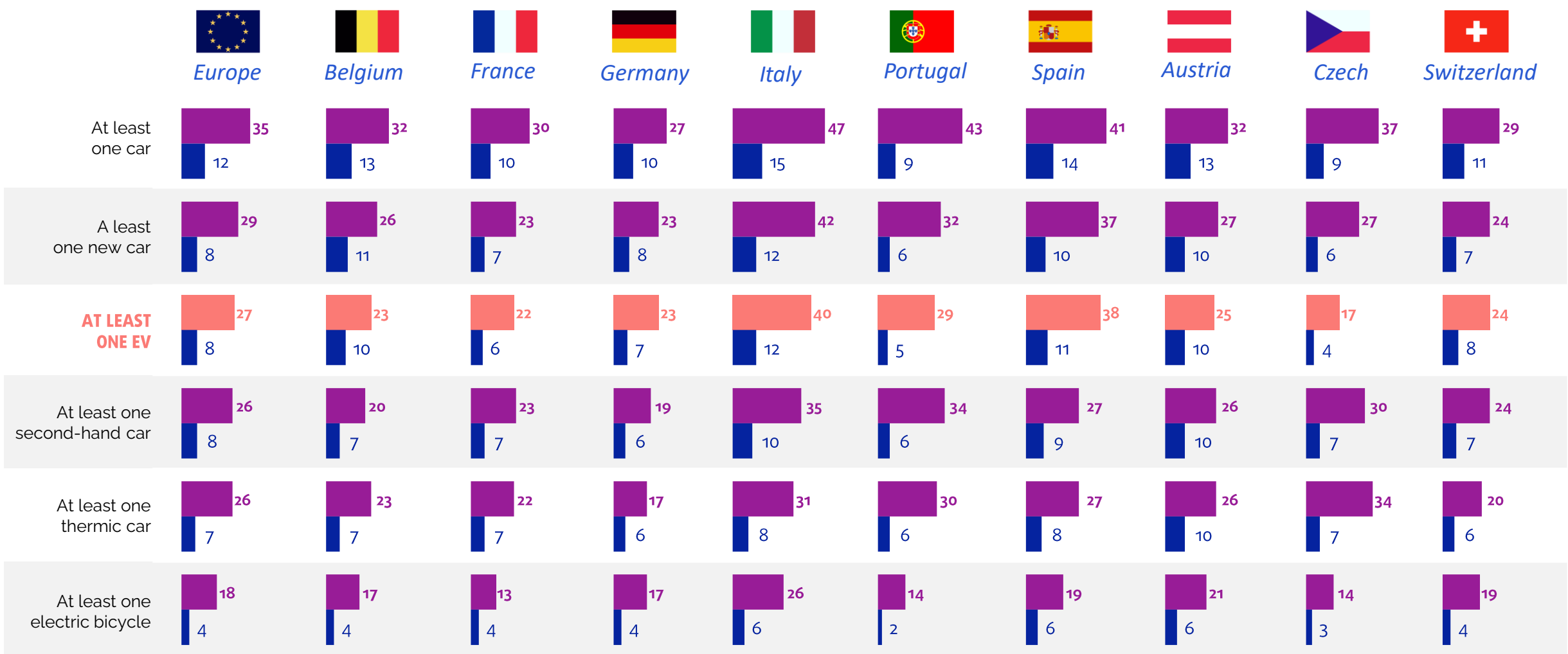
VEHICLES OWNERSHIP & INTENTIONS

Future intention









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

Base: All

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



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

	 <i>Europe</i>	 <i>Belgium</i>	 <i>France</i>	 <i>Germany</i>	 <i>Italy</i>	 <i>Portugal</i>	 <i>Spain</i>	 <i>Austria</i>	 <i>Czech</i>	 <i>Switzerland</i>
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



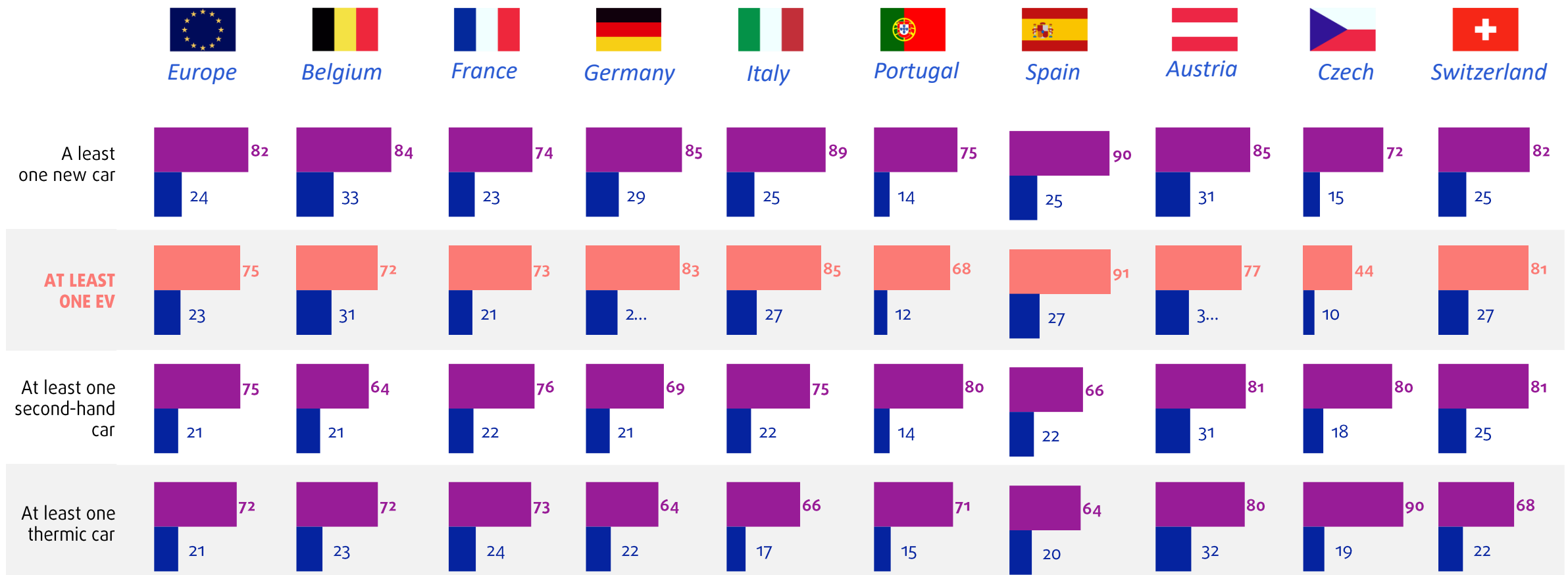
Significantly inferior to previous wave

**Evolutions
in points vs
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



«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

Evolutions
in points vs
previous
wave

Q26 - Where do you intend to acquire this car?

Base: Intend to purchase a car

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

																				
	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

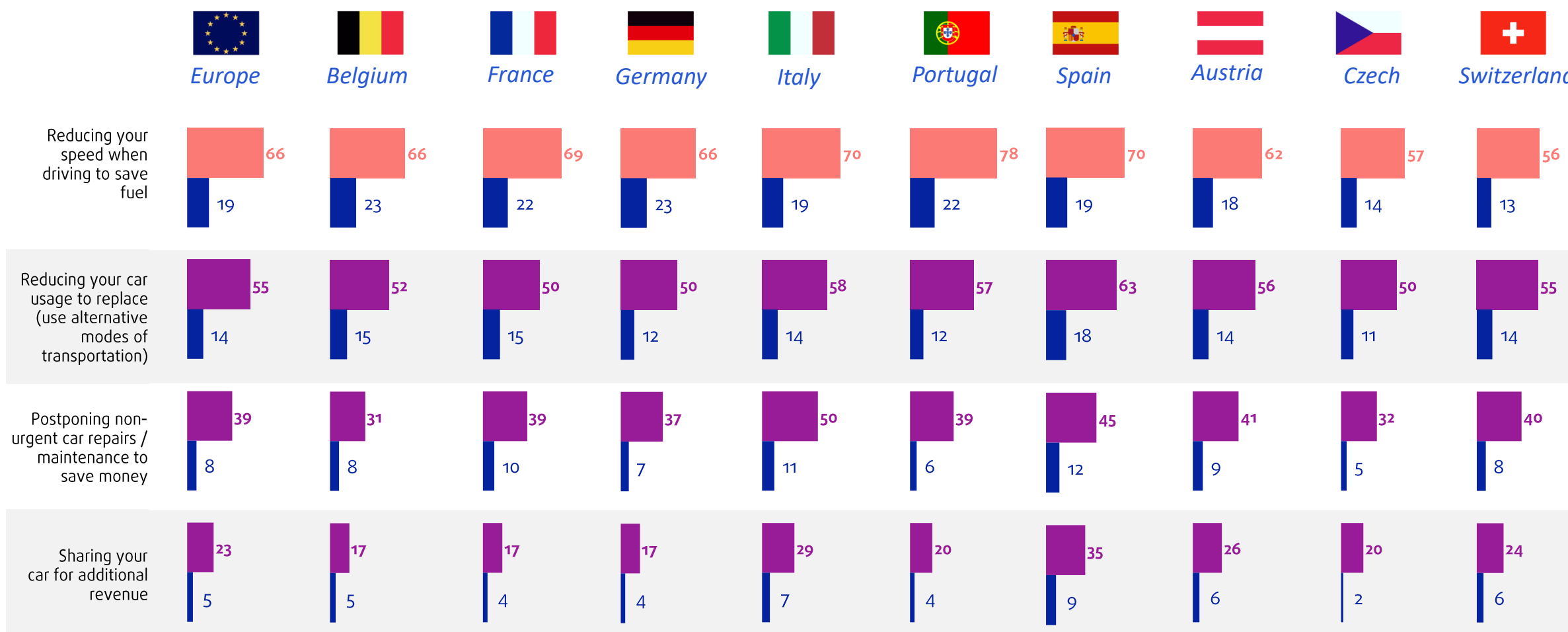
Significantly superior to previous wave

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.**

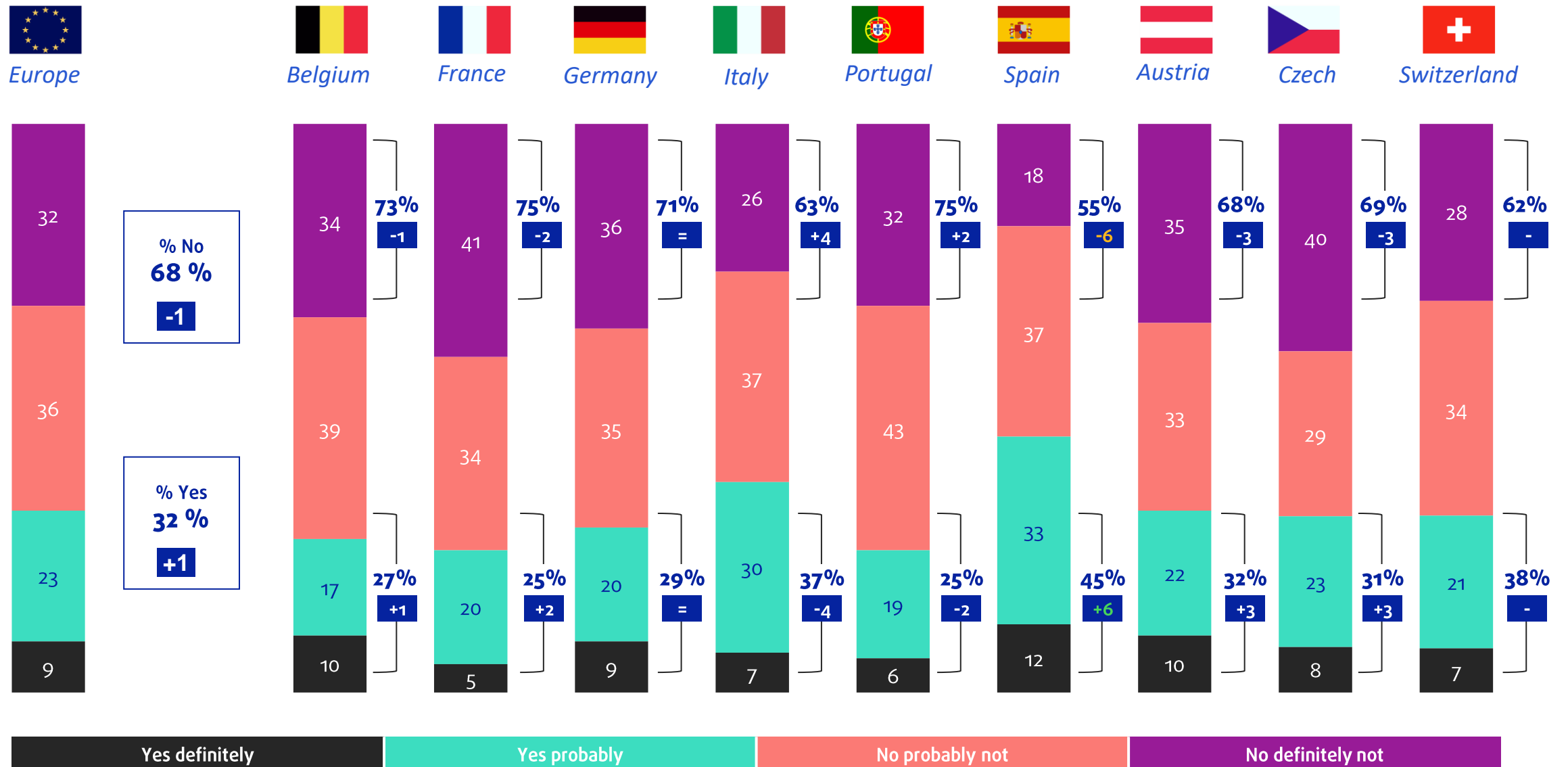


Q28 - In the future, could you consider no longer having a personal car?

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.





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

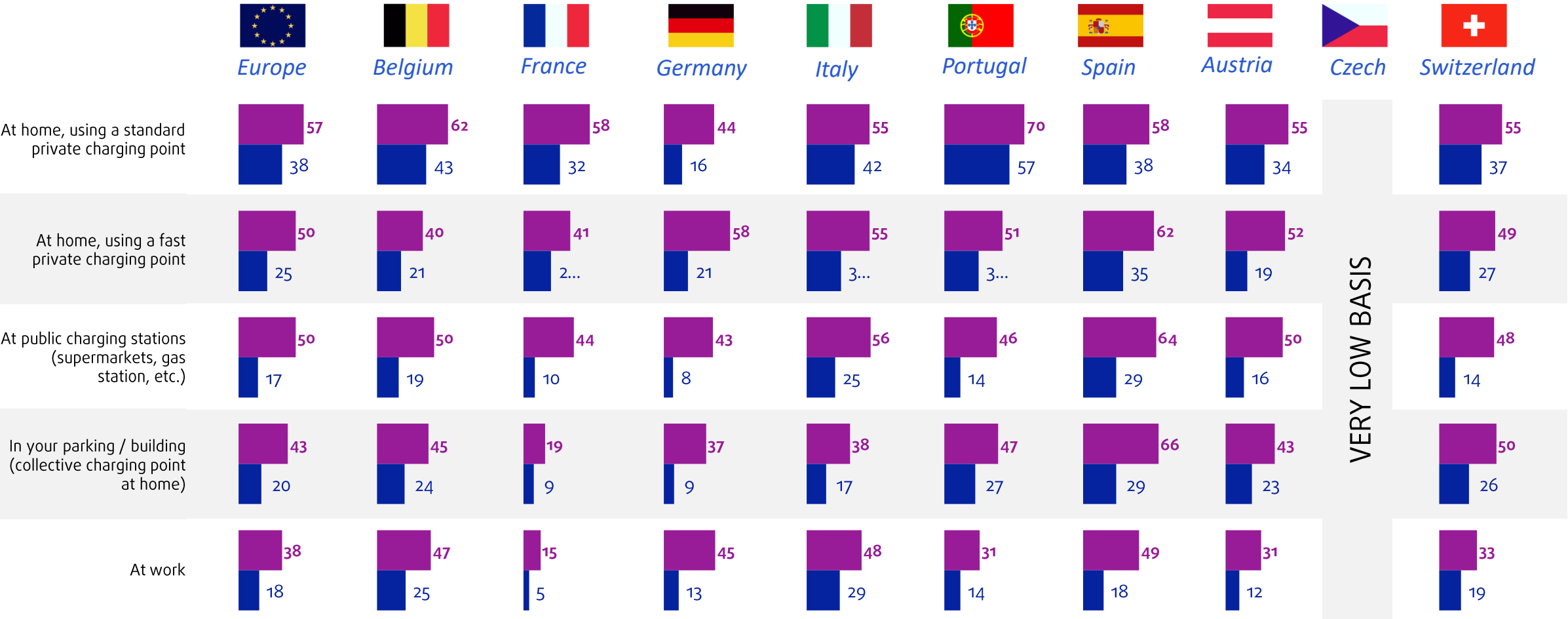
VEHICLES OWNERSHIP & INTENTIONS

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



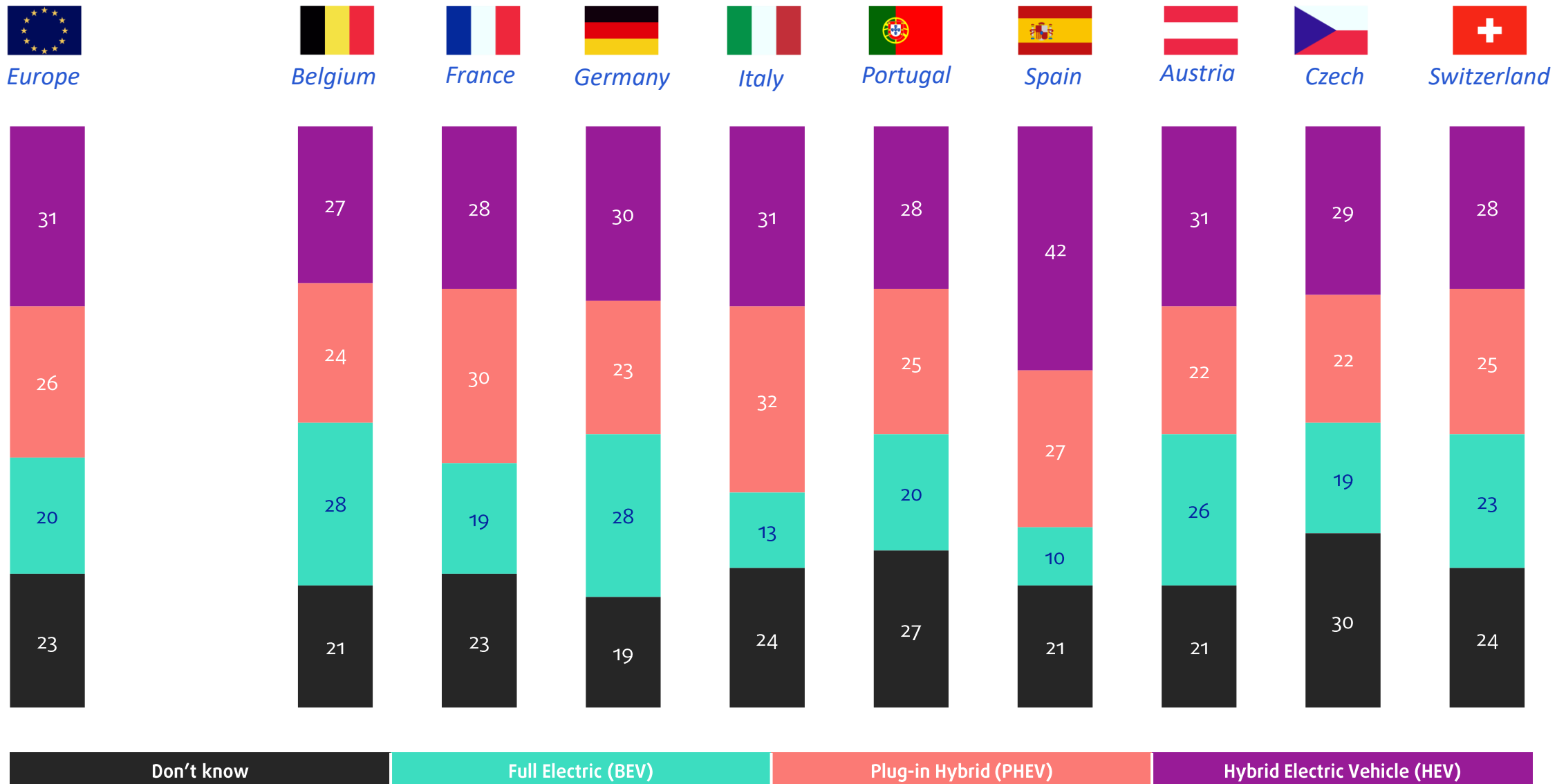
*Warning : low bases between 40 to 60 respondents by country

% 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

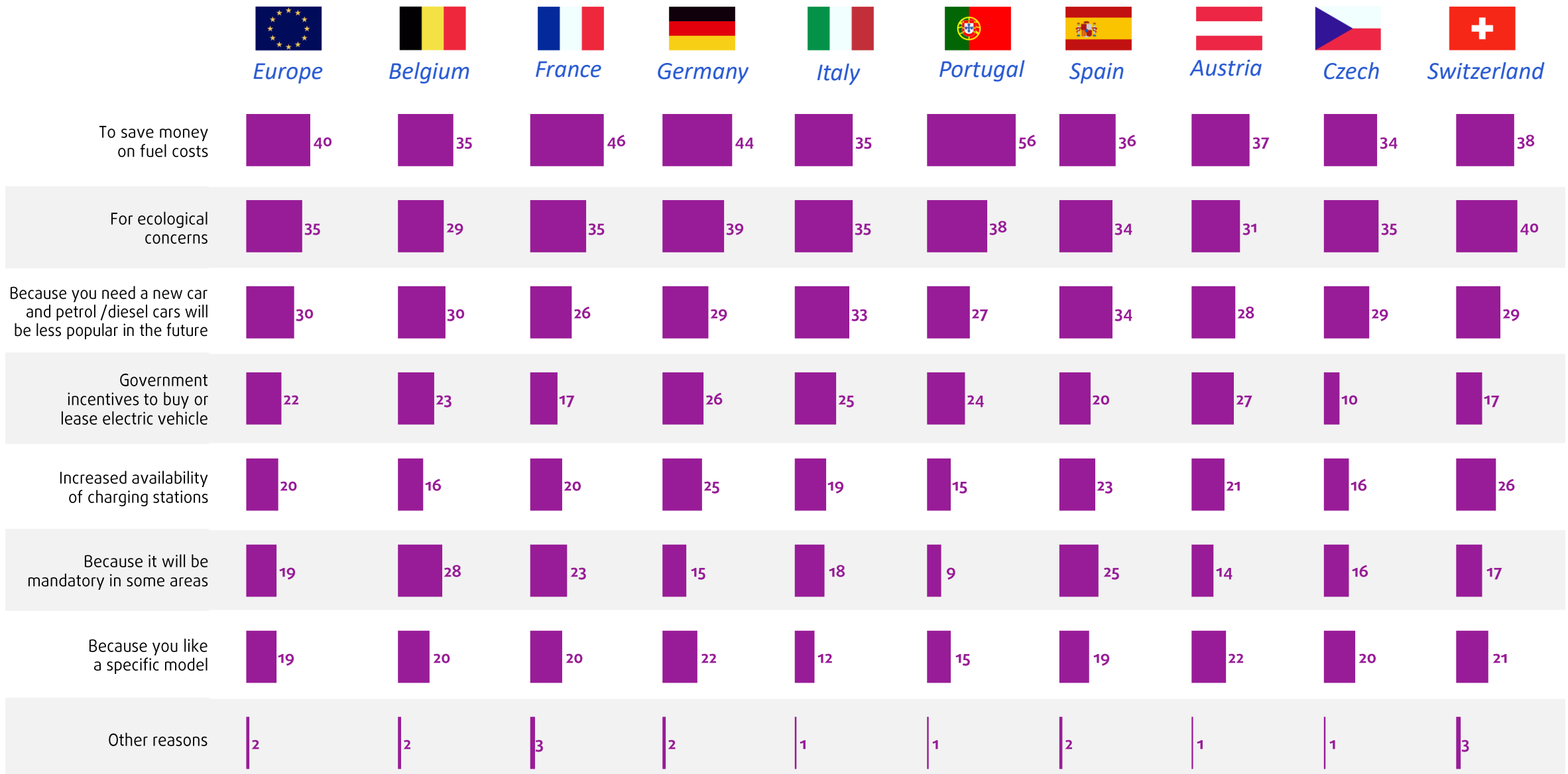
Hybrid vehicle is the most considered vehicle among EV intenders, especially in Spain. Belgium, Germany and Austria are more open to consider BEV



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



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



Europe



Belgium



France



Germany



Italy



Portugal



Spain



Austria

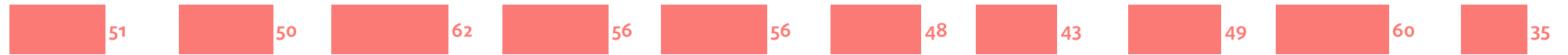


Czech

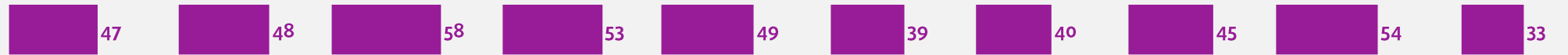


Switzerland

NET COST



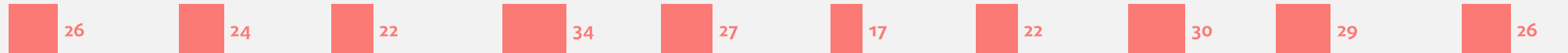
High purchase costs



I'm afraid of
maintenance costs



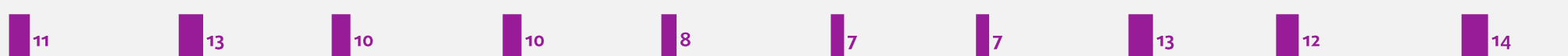
NET CHARGING POINTS



No possibility to
install charging points at
your home



Not enough public
charging points in the
places where I go



No charging points
at your office



Difficulty to make
long-distance trips



I don't need a new car
at the moment



Other













Results



Sub-total

«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

Evolutions
in points vs
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 if 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.



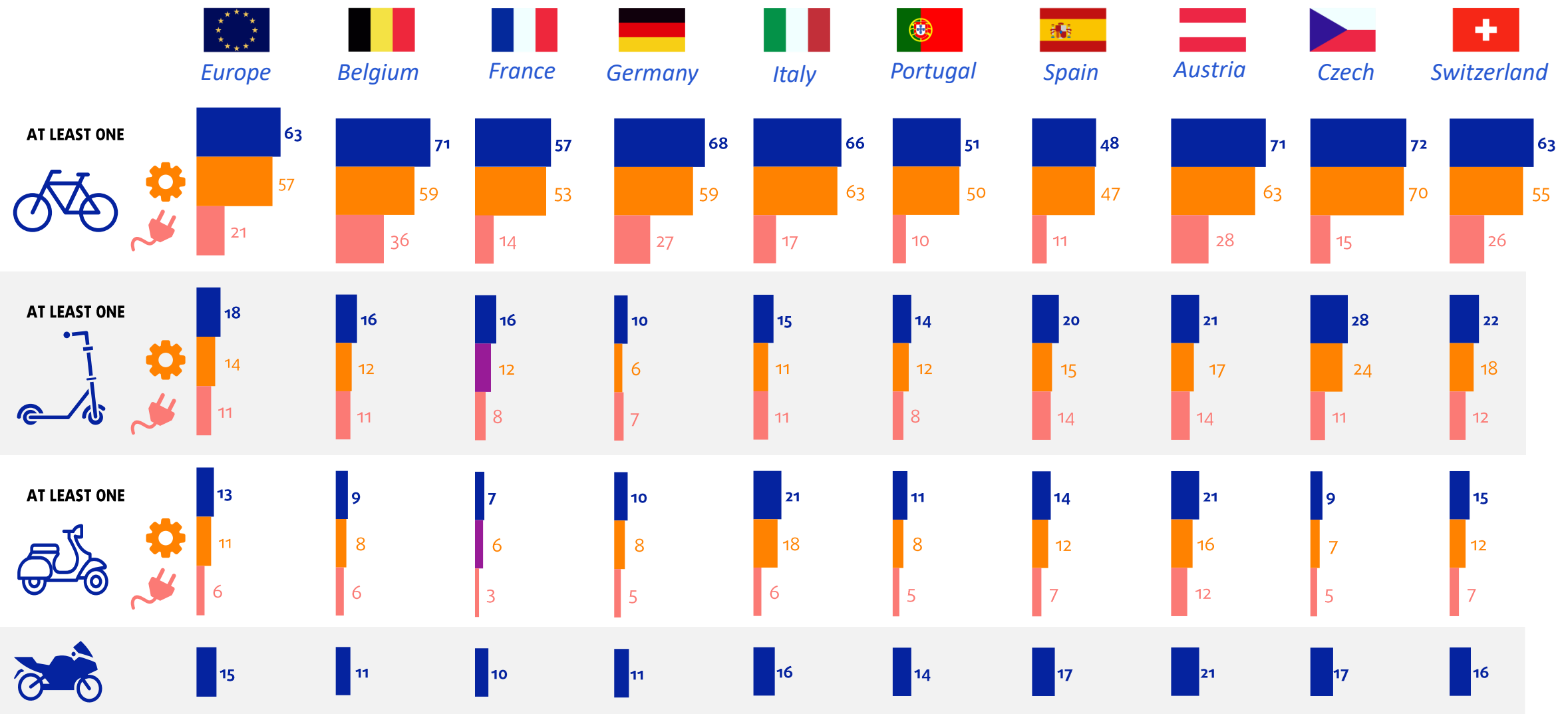
03

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



«**Bicycle ownership 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



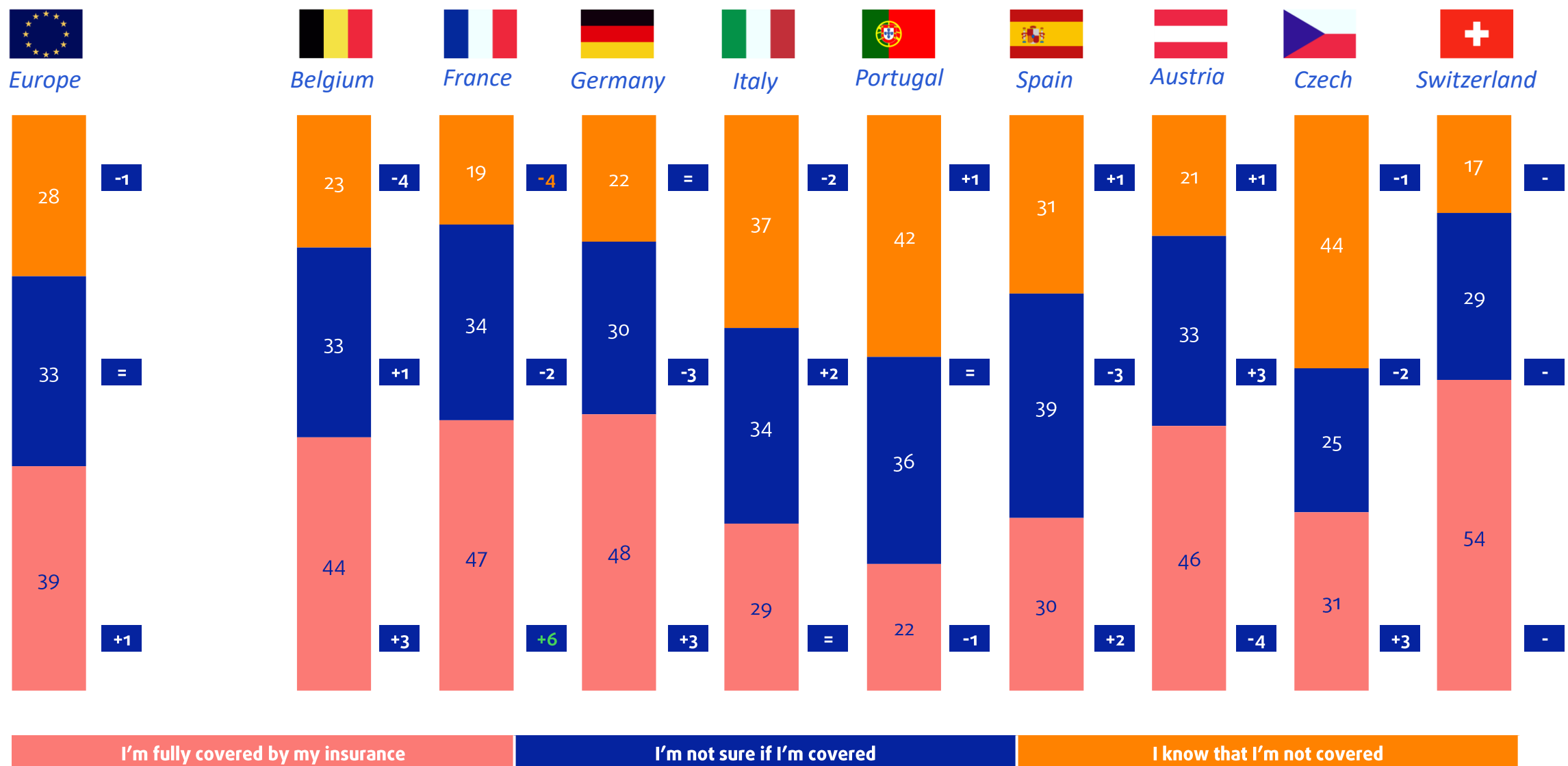
Significantly inferior to previous wave

Evolutions
in points vs
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.



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 %

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

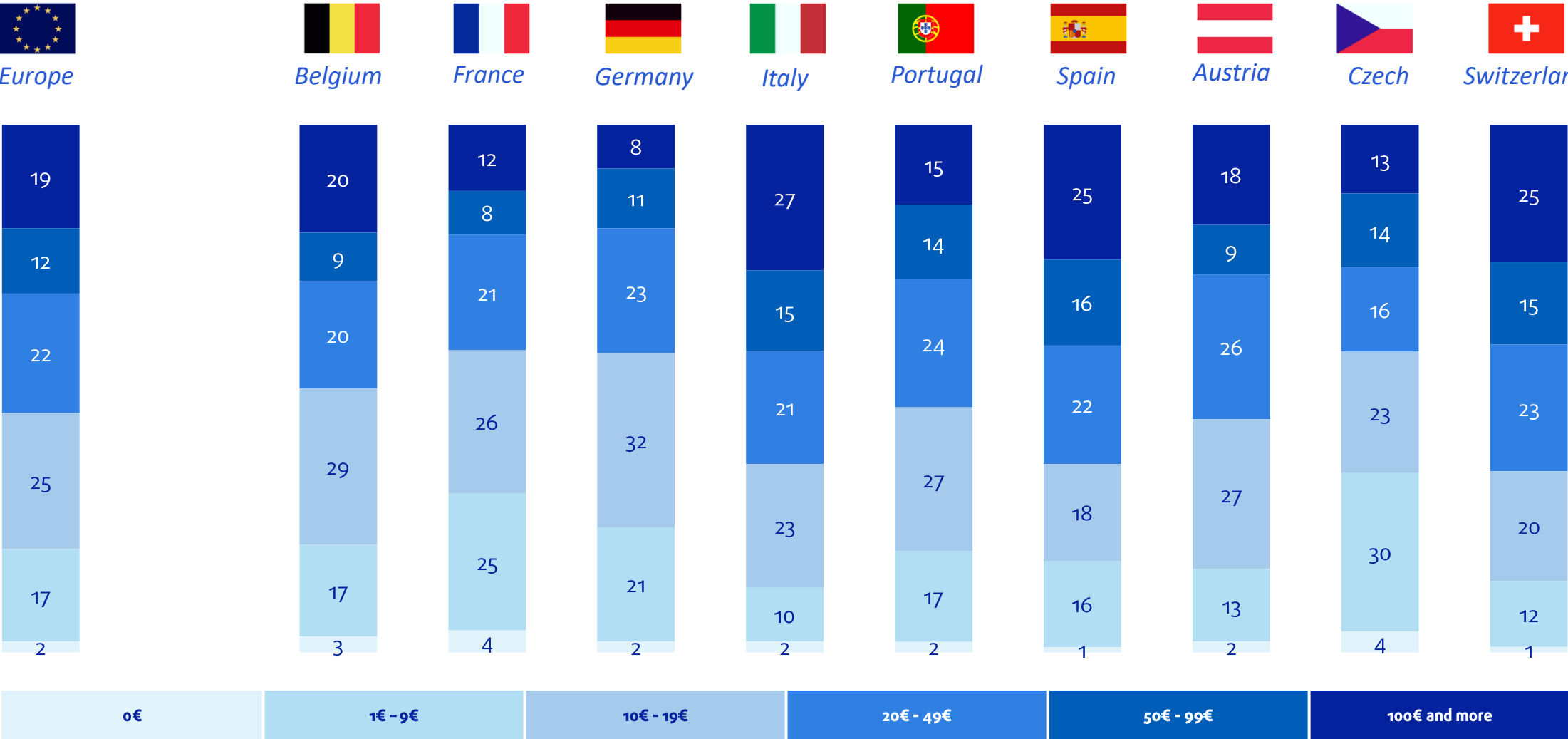
Other

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)?

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

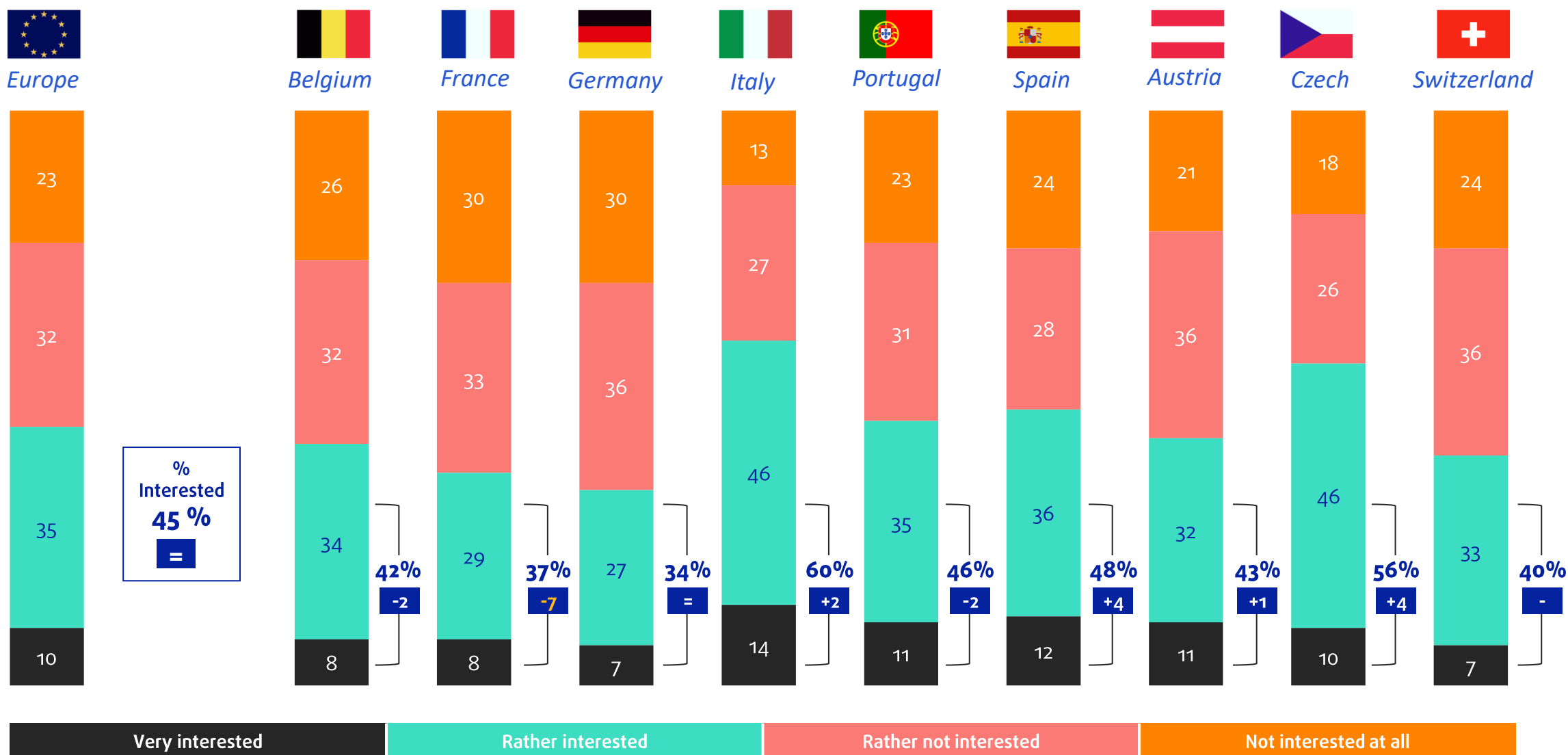
Base: Bicycle owners interested in assistance



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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