

Mobility barometer



A shift towards more personal mobility devices, avoiding proximity with strangers



Increase in frequency
since Covid among Europeans users

25% Standard bikes
28% Personal Stand-scooters
30% Electric bikes
31% Walking

Decrease in frequency
since Covid among Europeans users

30% Car-sharing
27% Car-pooling
25% Public transportation
25% Taxi / Ride hailing



2 main reasons for mobility habits change

40% Cost of transports
36% Environmental impact
64% of Europeans had to review their mobility habits due to inflation/fuel costs
64% have changed their mobility habits to be greener



Cars remain widespread in Europe

88% own a car in their household.
68% stable usage of the car.

A future without having my own car?



1/3 car owner in Europe could consider **not having a personal car in the future**
Only 8% could "definitely" do it.

But some people more than others

40% of 18-34 y.o. could give up personal cars, 12% "definitely"
35% in large cities vs 31% in smaller towns and rural areas
More reluctance to give up cars in France and Belgium, less in Italy and Spain

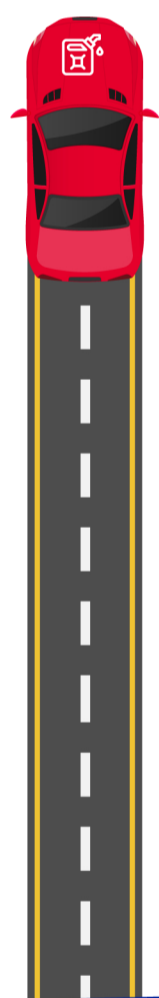


Ecological conscience

54% of Europeans feel bad about the ecological footprint linked to the usage of their car
But only 15% "strongly agree"

Much higher scores in Portugal and Spain (75% agree).

Barriers for Electric Vehicles adoption still need to be overcome



89% of cars used most often are ICE (petrol / diesel)

5% Hybrid cars
1% Electric Vehicle



A real potential for hybrid and Electric Vehicles:

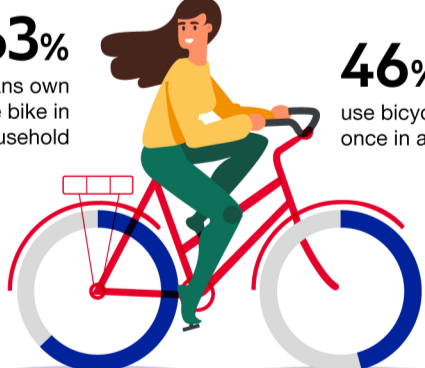
31% of Europeans could consider buying and EV / Hybrid car (9% "certainly").

Strong barriers to EV adoption

56% COST (Purchase costs: 52%, Maintenance costs: 18%)
32% CHARGING POINTS (Difficulties to install them at home: 25%, No charging points at the office: 14%)
30% EV AUTONOMY (Difficulty to make long-distance trips)

Bicycles and micro-mobility: a new European way of life?

63% of Europeans own at least one bike in their household
46% use bicycles at least once in a while



1/5 Europeans adopted electric bikes

30% among 18-34 years-old
Less common in Spain and Portugal (16% of use each)
More common in Belgium and Germany (25% and 24%).



Stand-scooters

17% of owners on average in Europe
Split quite evenly between standard (13%) & electric scooters (11%).
Higher ownership in France and Spain

28% among 18-34 years-old.

33% of users started using them regularly during or since the Covid crisis.

Heterogeneous safety and coverage habits



62% of users usually wear helmets on bike/scooters
38% never wear any protection

1/3 of users are sure to be covered by their insurers in case of accident while using bikes or stand scooters

4/10 Europeans could be interested by a person-based insurance when it comes to mobility.

53% among 18-34 years old
56% Bicycle users
70% stand-scooter users

