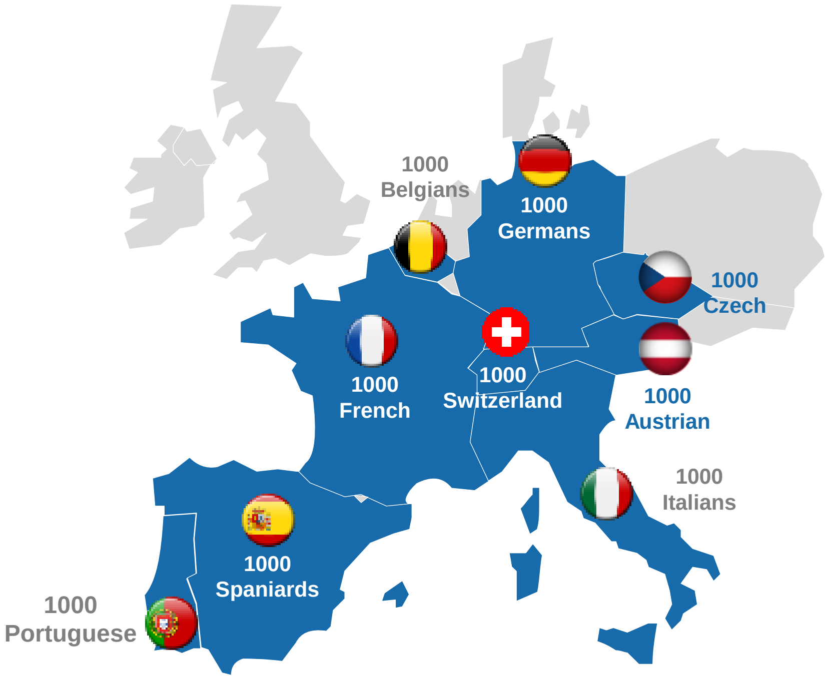
MOBILITY BAROMETER AMONG EUROPEANS

FEBRUARY 2025

SCOPE OF THE SURVEY



9
countries

Switzerland
added this year to the barometer

9000
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

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

Differences between each country and global results

XX Significantly better result in the country compared to EUROPE

XX Significantly lower result in the country compared to EUROPE

Evolutions between 2024 and 2023 results

XX Significantly better results in 2024 compared to 2023. Only on the same 8 countries tested in 2023.

XX Significantly lower result in 2024 compared to 2023. Only on the same 8 countries tested in 2023.

KEY LEARNINGS

KEY LEARNINGS

1. Mobility Habits :

- ✓ **An overall stability in Europeans' mobility habits**, with the two main modes used still being walking and personal car.

- ✓ 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, but overall stable this year in Europe** (+ 1 point). **Electric bikes continue to show a positive trend**, with a **more frequent use** than before.

- ✓ When **mobility habits have changed**, it is mainly due to **economical reasons** (costs), followed by environmental ones.

Indeed, looking at the **motivations to use more eco-friendly options**, **cost reduction** appears as the top motivation.

- ✓ **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

2. Car Ownership & intentions:

- ✓ **Personal car ownership** remains **widespread in Europe.**

- ✓ 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.**

- ✓ 1 out of 4 Europeans are interested **in EV acquisition, a slight decrease** compared to last year.

KEY LEARNINGS

3. EV Focus

- ✓ **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.

4. Micro-mobility

- ✓ **More than a third of Europeans** think that they are **properly insured when using micro-mobility devices or bicycles.**

- ✓ **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 **interest for a person-based insurance stays quite solid with almost half of Europeans interested** –stable overall.

KEY LEARNINGS

5. Insurance & assistance services

- ✓ **Car insurance budget shows disparities depending on the country** (higher budgets in Switzerland and Austria, but much lower in Czech Republic and Portugal).
- ✓ **Roadside assistance is particularly important when acquiring a car or choosing an insurance**, as well as access to a replacement car in case of problem.
- ✓ Whatever the situation (facing a flat tire or flat battery, an accident, in their own country or abroad), **strong preference for human operators over the phone.**
- ✓ Regarding assistance, the most important service commitment is the **time to arrival of the patrol / towing truck** on the spot.
- ✓ **Roadside assistance, repair and replacement car** are still the most valued assistance services in most countries, while **pick-up and delivery services generate an increased interest** this year.
- ✓ **Interest in Europe for alternative mobility solutions is still growing** (mainly in Spain and France).

1.

MOBILITY HABITS IN EUROPE

1.1
CURRENT MOBILITY HABITS

WALKING AND PERSONAL CAR REMAIN THE MOST WIDESPREAD MODES OF TRANSPORTATION ON WEEKDAYS, PUBLIC TRANSPORTATION IS ALSO IMPORTANT IN SWITZERLAND

MODES OF TRANSPORTATION USED ON WEEKDAYS %

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

More than 1 hour a day / used

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

MAIN MODES OF TRANSPORTATION ON WEEKDAYS ARE QUITE STABLE IN EUROPE

MODES OF TRANSPORTATION USED ON WEEKDAYS %

%Used Evolutions in points vs 2023	EUROPE									
Walking	=	-1	+1	-1	+2	=	-1	=	=	-
A personal car	=	-1	=	-2	-1	-1	-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	=	-

NEW

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

XX significantly superior to 2023
XX significantly inferior to 2023

A SIMILAR USE OF MODES OF TRANSPORTATION ON WEEKENDS

MODES OF TRANSPORTATION USED ON WEEKENDS %

	EUROPE									
Walking	35 / 89	26 / 81	27 / 82	32 / 88	37 / 88	26 / 88	42 / 93	36 / 94	48 / 94	40 / 92
A personal car	29 / 79	25 / 75	25 / 80	25 / 75	40 / 88	38 / 84	27 / 79	29 / 81	28 / 76	25 / 72
Public transportation	11 / 44	10 / 38	6 / 29	11 / 44	11 / 32	7 / 30	10 / 48	14 / 61	12 / 51	17 / 65
Personal standard bicycle	8 / 32	8 / 33	6 / 22	9 / 37	12 / 35	6 / 20	8 / 27	8 / 44	10 / 36	6 / 35
Motorbike / two-wheel scooter	5 / 15	4 / 11	3 / 9	5 / 13	9 / 21	4 / 11	5 / 18	8 / 24	3 / 12	4 / 17
Personal electric bicycle	5 / 18	6 / 27	4 / 11	7 / 22	6 / 17	2 / 8	4 / 14	9 / 29	5 / 14	6 / 23
A company car	4 / 12	6 / 16	2 / 6	4 / 10	5 / 13	2 / 9	5 / 13	6 / 18	6 / 12	4 / 13
Car sharing	4 / 14	3 / 10	1 / 5	4 / 9	8 / 20	4 / 21	4 / 15	6 / 18	6 / 17	2 / 12
Car pooling	4 / 16	3 / 13	2 / 8	4 / 13	4 / 12	3 / 16	5 / 18	7 / 23	7 / 27	4 / 18
Shared bicycle or stand scooter	4 / 14	3 / 11	2 / 6	4 / 14	5 / 16	1 / 8	3 / 15	6 / 25	3 / 9	3 / 17
Taxi / ride-hailing	3 / 16	3 / 11	1 / 6	2 / 13	5 / 15	2 / 18	5 / 24	6 / 25	3 / 19	2 / 15
Personal Stand scooter	3 / 12	3 / 10	2 / 6	4 / 9	5 / 13	2 / 7	3 / 14	5 / 20	4 / 12	4 / 15

More than 1 hour a day | used

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

OVERALL, NO MAJOR EVOLUTION IN MAIN MOBILITY HABITS, EXCEPT SOME SLIGHT EVOLUTIONS MAINLY IN FRANCE AND AUSTRIA

MODES OF TRANSPORTATION USED OVERALL – AT LEAST ONE USE %

Evolutions in points vs 2023 +X/-X

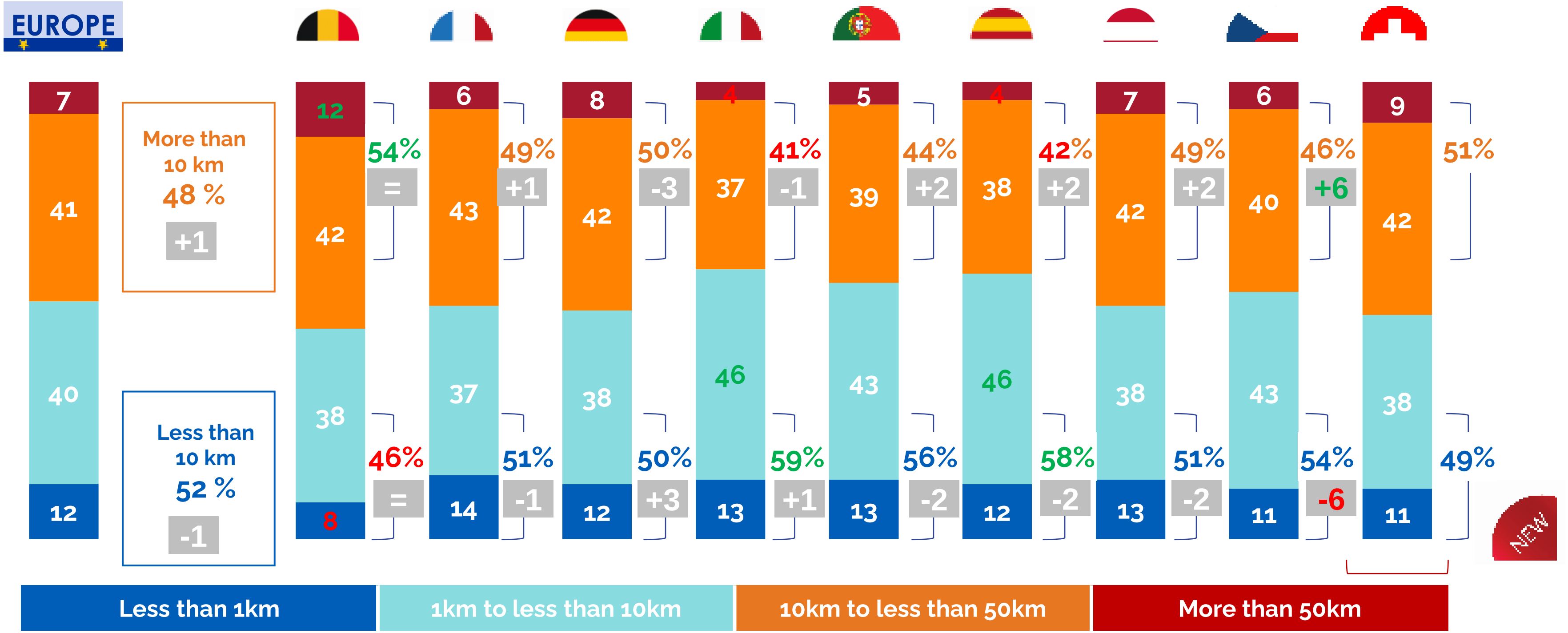
	EUROPE																			
Walking	95	+1	89	=	91	+2	95	-1	96	+2	94	=	98	=	97	-1	98	=	96	-
A personal car	84	+1	81	-1	86	+1	81	-1	93	-1	88	+1	84	-2	85	+2	82	+6	77	-
Public transportation	58	=	50	+1	41	=	58	-3	46	+1	45	+1	63	+1	74	+2	66	-3	76	-
Personal standard bicycle	39	=	41	+2	27	-4	46	-1	42	-6	24	-2	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	-

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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

COMMUTING DISTANCE STAYS STABLE OVERALL

DISTANCE HOME > PLACE OF WORK OR STUDIES %



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

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

IN EUROPE HOME OFFICE IS LESS USED, BUT IT IS USED MORE REGULARLY THAN PAST YEAR

DAYS HOME OFFICE - %

	EUROPE																		
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

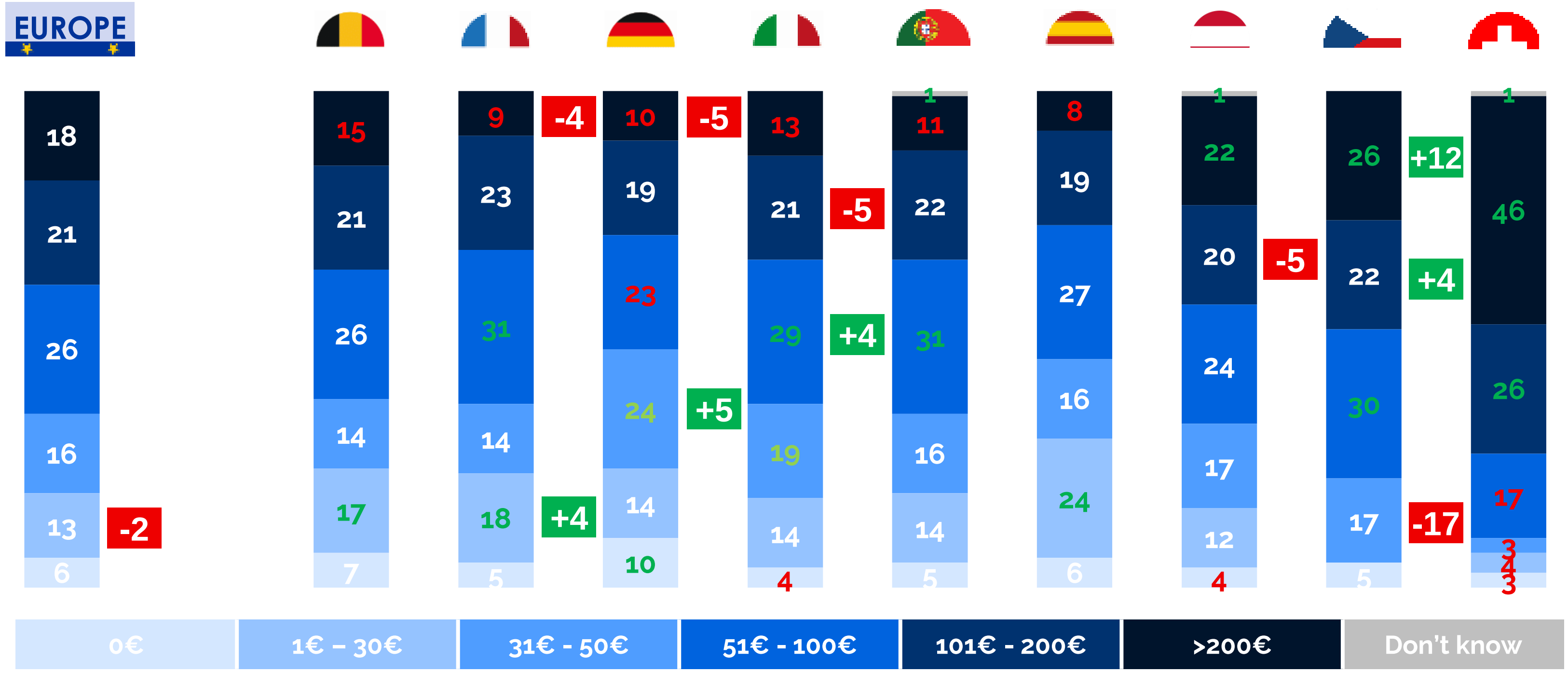
Average excluding "I never work from home"

Q9 –Which days of the week do you typically work from home?
Base : workers

XX significantly superior to European average and to 2023
XX significantly inferior to European average and to 2023

MOBILITY BUDGET IS STABLE OVERALL IN EUROPE (8 COUNTRIES), HIGHER BUDGETS IN SWITZERLAND

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



XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

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

1.2

EVOLUTIONS COMPARED TO 5 YEARS AGO

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

USE MORE FREQUENTLY THAN 5 YEARS AGO %

	EUROPE									
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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

…WHEREAS MODES INVOLVING CAR SHARING WITH OTHERS DECLINE

USE LESS FREQUENTLY THAN 5 YEARS AGO %

	EUROPE									
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

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

X significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

OVERALL, PERSONAL ELECTRIC BICYCLE, WALKING AND PUBLIC TRANSPORTATION KEEP SHOWING THE MOST POSITIVE DELTA OF USE

DELTA USE (MORE – LESS)

	EUROPE									
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

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

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

MOBILITY HABITS EVOLUTION REASONS %

	EUROPE																			
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	

NEW

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

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

COST REDUCTION IS BY FAR THE FIRST MOTIVATION TO USE PUBLIC TRANSPORTATION MORE OFTEN, WHEREAS FOR BICYCLES COST IS NECK AND NECK WITH INFRASTRUCTURES.

NEW

MOTIVATIONS TO USE ECO -FRIENDLY MOBILITY OPTIONS MORE OFTEN

PUBLIC TRANSPORTATION

	EUROPE									
#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

	EUROPE									
#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.

NEW

MOTIVATIONS TO USE ECO -FRIENDLY MOBILITY OPTIONS MORE OFTEN

CAR SHARING

	#1	#2	#3
EUROPE	Reduce cost 41%	Improve availability 33%	Increase safety 17%
Belgium	Improve availability 39%	Reduce cost 37%	Make it more comfortable 14%
France	Reduce cost 36%	Improve availability 33%	Increase safety 19%
Germany	Reduce cost 40%	Improve availability 38%	Improve punctuality 14%
Italy	Reduce cost 37%	Improve availability 31%	Make it more comfortable 23%
Portugal	Reduce cost 41%	Increase safety 32%	Improve availability 23%
Spain	Reduce cost 45%	Improve availability 27%	Increase safety 19%
Austria	Reduce cost 41%	Improve availability 41%	Improve punctuality 15%
Czech Republic	Reduce cost 49%	Improve availability 29%	Increase safety 17%
Switzerland	Reduce cost 43%	Improve availability 38%	Improve punctuality 15%

SHARED MOPED / TWO WHEELS

	#1	#2	#3
EUROPE	Reduce cost 32%	Increase safety 25%	Improve availability 25%
Belgium	Increase safety 27%	Improve infrastructure 25%	Reduce cost 24%
France	Increase safety 34%	Improve infrastructure 28%	Reduce cost 27%
Germany	Reduce cost 35%	Improve availability 27%	Increase safety 18%
Italy	Increase safety 29%	Reduce cost 28%	Improve availability 20%
Portugal	Reduce cost 37%	Increase safety 27%	Improve availability 24%
Spain	Reduce cost 31%	Increase safety 30%	Improve availability 23%
Austria	Reduce cost 35%	Improve availability 32%	Increase safety 21%
Czech Republic	Reduce cost 39%	Improve availability 28%	Increase safety 18%
Switzerland	Reduce cost 35%	Improve availability 27%	Increase safety 22%

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

NEW

COST, AVAILABILITY AND INFRASTRUCTURE ARE CLOSE TO EACH OTHER AS MOTIVATIONS TO MORE OFTEN SHARED BIKES/ STAND SCOOTERS.

MOTIVATIONS TO USE ECO -FRIENDLY MOBILITY OPTIONS MORE OFTEN

SHARED BICYCLES OR STAND SCOOTERS

	EUROPE									
#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%

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

1.3
FUTURE INTENTIONS

ENTHUSIASM FOR E-BIKES APPEARS LESS INTENSE THAN LAST YEAR (ESPECIALLY IN GERMANY, ITALY AND AUSTRIA)

INTENTION TO USE MORE FREQUENTLY THAN TODAY %

	EUROPE																			
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	

NEW

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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

europ assistance

Ipsos

AN ANTICIPATED DECREASE IN FREQUENCY OF USE MAINLY FOR SHARED BICYCLE OR STAND SCOOTERS, ESPECIALLY IN BELGIUM, ITALY AND AUSTRIA

INTENTION TO USE LESS FREQUENTLY THAN TODAY %

	EUROPE																			
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	-

NEW

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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

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

DELTA INTENTION OF USE (MORE – LESS)

	EUROPE									
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

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

ELECTRIC BIKES GENERATE THE HIGHEST ENTHUSIASM (INTENTION TO USE MORE FREQUENTLY) IN FRANCE, BELGIUM AND GERMANY

INTENTION OF USE - %

	EUROPE									
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

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

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).

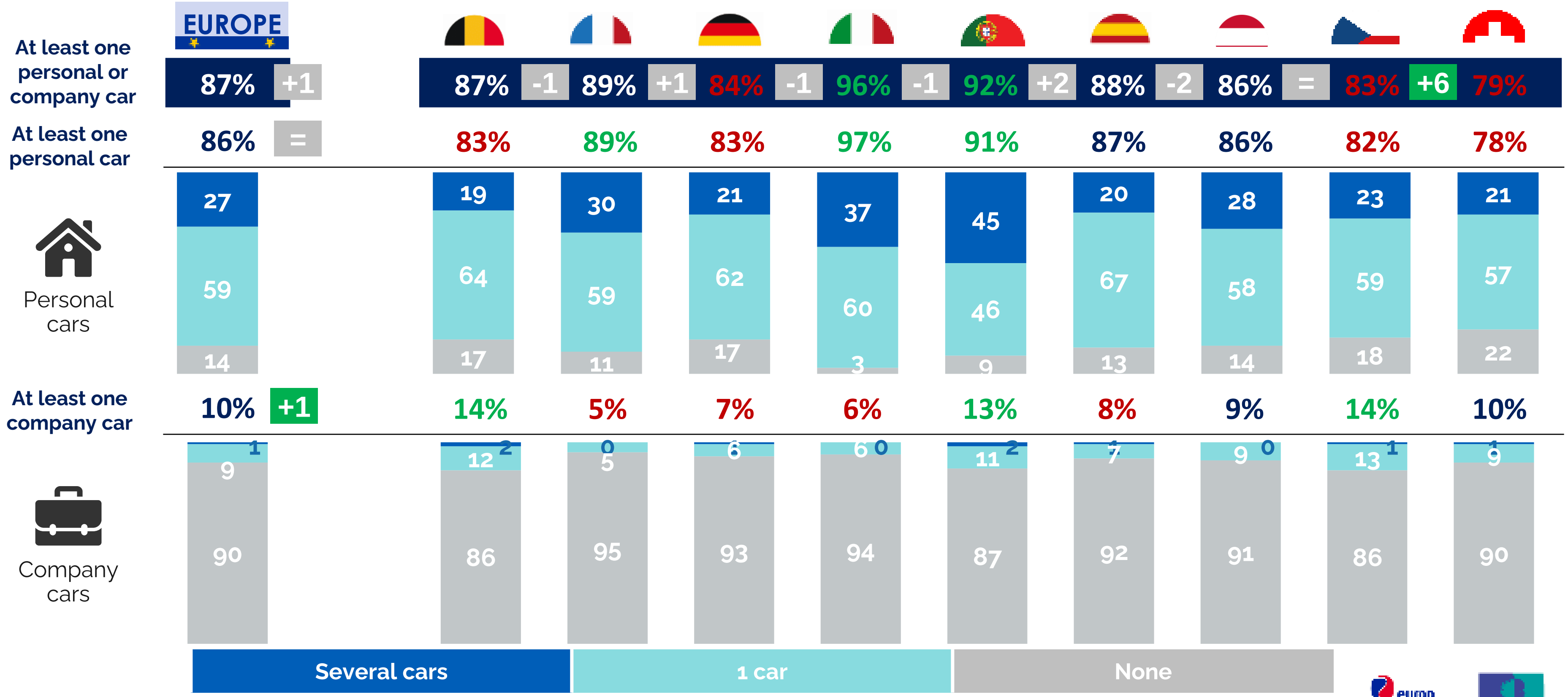
- ✓ **Future intentions** show a potential of **development for eco-friendly options** : **bicycles (both standard and electric),** walking and public transportation.
- ✓ As for personal cars, **a trend towards a more sensible use of cars :** only 14% of Europeans intend to use it more in the future, while 16% say it would rather be less. This trend to turn away from the car is stronger in France and Belgium.

2.

VEHICLES OWNERSHIP AND INTENTIONS

PERSONAL CAR OWNERSHIP STAYS WIDESPREAD IN EUROPE

NUMBER OF CARS OWNED BY THE HOUSEHOLD %

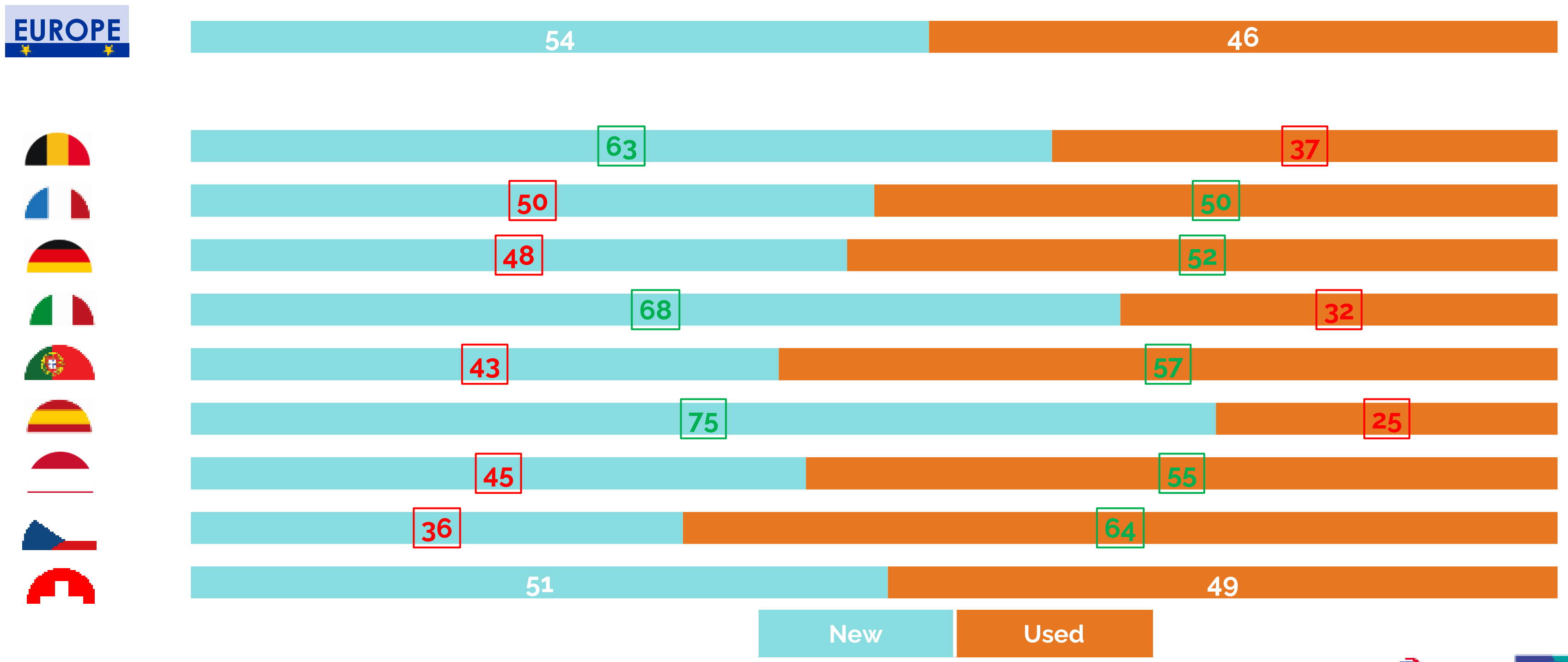


Q11 – How many cars do you own in your household? Base : All

2.1
CAR USED MOST OFTEN

EUROPEANS 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)

MAIN CAR NEW OR USED %

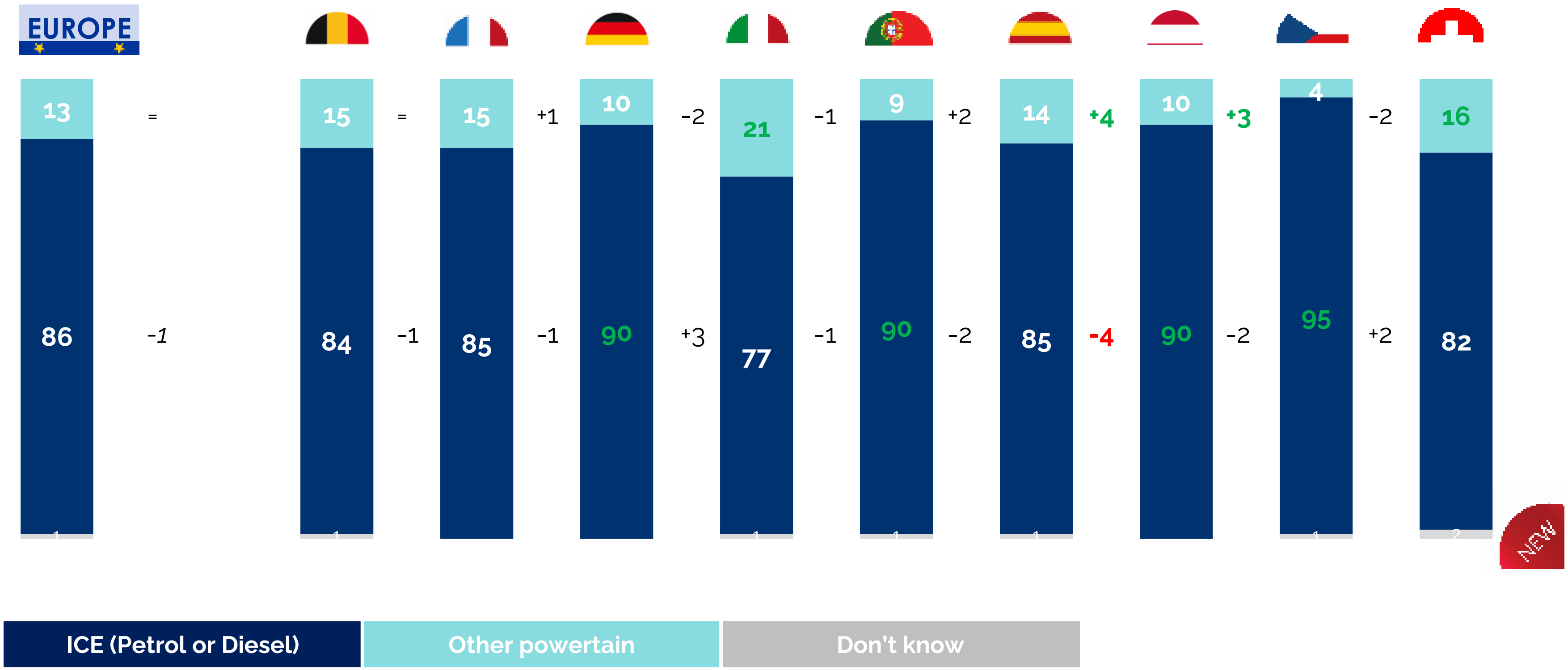


Q14B – Was this car bought new or used?
Base : Car Owners

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

ICE-VEHICLES ARE STILL THE MAJORITY WITH SAME LEVEL THAN 2022. OTHER POWERTAINS ARE PROGRESSING IN SPAIN AND AUSTRIA, AND ALREADY QUITE PRESENT IN SWITZERLAND

POWERTRAIN %



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

XX significantly superior to European average or to 2023
XX significantly inferior to European average or to 2023

FULL ELECTRIC VEHICLES ARE STILL A MINORITY, AND STABLE IN ALL COUNTRIES.

POWERTRAIN %

	EUROPE																		
Petrol	52	+2	59	+5	45	+2	68	+1	43	+2	42	+2	42	-1	47	+1	63	+3	63
Diesel	35	-3	2	-6	40	-3	22	+1	34	-3	48	-4	44	-2	42	-4	33	-1	2
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

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

XX significantly superior to 2023
XX significantly inferior to 2023

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

CAR FINANCING %

	EUROPE																		
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 do not know	5	=	6	+1	3	+1	2	-1	5	=	6	+2	3	-1	3	=	6	-2	5

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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

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

CAR PURCHASE CHANNEL %

	EUROPE									
Manufacturer's dealership	49	58	59	54	48	37	66	49	21	48
Independent garage	18	20	18	10	32	31	7	10	13	20
Directly from an individual seller	16	10	10	16	11	20	13	18	28	14
NET Online	13	9	9	15	7	6	12	20	28	14
Online marketplace	7	5	4	8	3	2	4	14	12	10
Online sales from car manufacturer, etc	6	4	5	7	4	4	8	6	16	4
Other, specify	4	3	4	5	2	6	2	3	10	4

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

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

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

REASONS TO CHOOSE WS OR DEALERSHIP %

	EUROPE									
Replacement car during repairs / maintenance	32 / 78	29 / 72	33 / 83	24 / 68	31 / 81	32 / 81	34 / 83	37 / 78	31 / 74	36 / 78
If this garage is certified by a motor assistance expert	23 / 74	[illegible] / 57	[illegible] / 66	22 / 75	24 / 78	29 / 85	28 / 81	32 / 81	[illegible] / 66	30 / 75
Car certification to guarantee the car quality	24 / 73	22 / 69	[illegible] / 68	[illegible] / 66	24 / 79	28 / 84	29 / 80	29 / 75	[illegible] / 63	25 / 75
Extension of the duration of your roadside assistance coverage	[illegible] / 66	[illegible] / 65	18 / 62	[illegible] / 47	23 / 76	21 / 75	26 / 79	[illegible] / 60	[illegible] / 66	[illegible] / 62
Pick-up & Delivery	23 / 65	[illegible] / 52	22 / 63	[illegible] / 53	27 / 75	23 / 77	29 / 77	23 / 58	[illegible] / 63	22 / 60

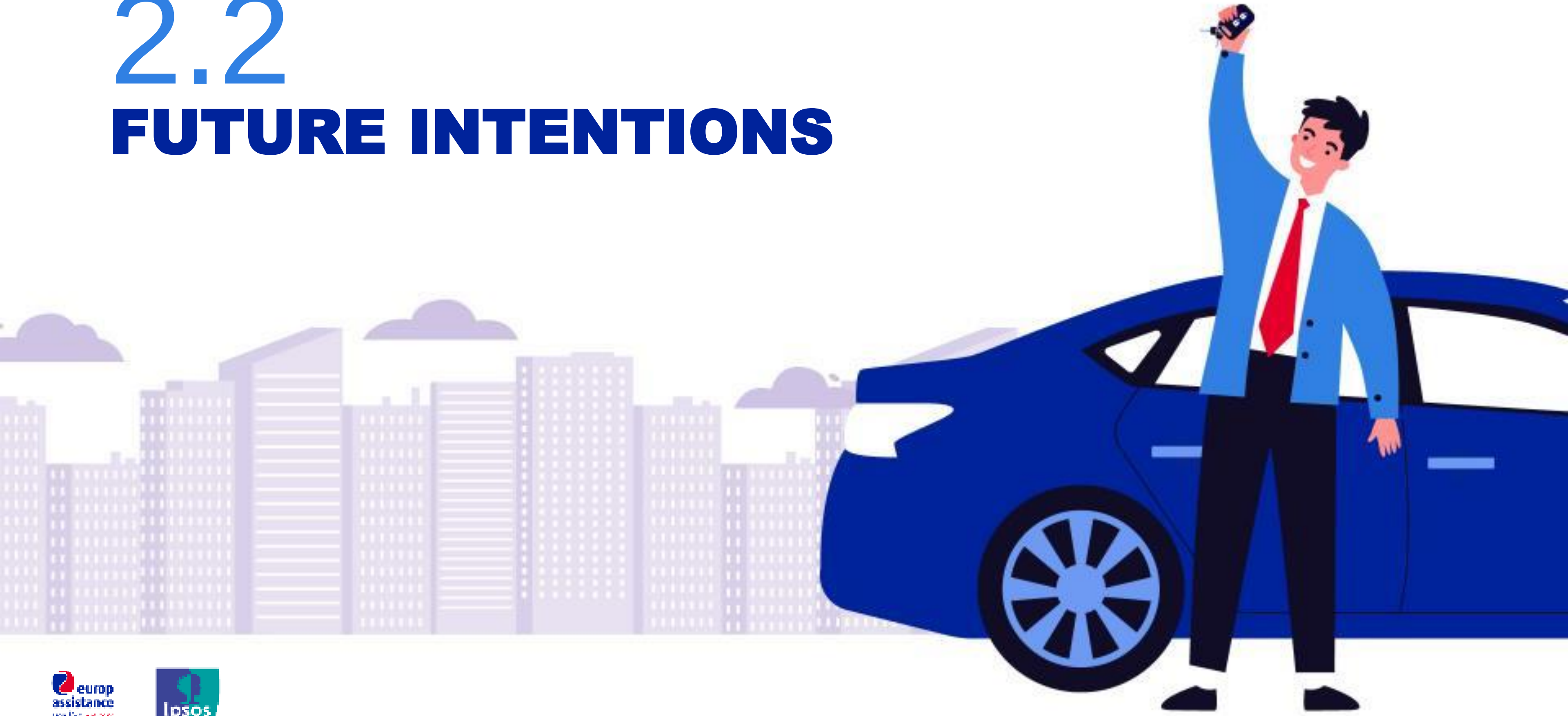
Q24 – If a garage/dealership offered the following services, would you preferably choose it for your car repairs, maintenance and servicing? If it offered…. Base : Car owners

Yes, certainly | % YES

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.

2.2
FUTURE INTENTIONS



1 OUT OF 4 EUROPEANS ARE INTERESTED IN EV ACQUISITION

INTENTIONS TO ACQUIRE %

	EUROPE																			
At least one car	12	35	13	32	10	30	10	27	15	47	9	43	14	41	13	32	9	37	11	29
A least one new car	8	29	11	26	7	23	8	23	12	42	6	32	10	37	10	27	6	27	7	24
At least one EV	8	27	10	23	6	22	7	23	12	40	5	29	11	38	10	25	4	17	8	24
At least one second-hand car	8	26	7	20	7	23	6	19	10	35	6	34	9	27	10	26	7	30	7	24
At least one thermic car	7	26	7	23	7	22	6	17	8	31	6	30	8	27	10	26	7	34	6	20
At least one electric bicycle	4	18	4	17	4	13	4	17	6	26	2	14	6	19	6	21	3	14	4	19

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

Yes, certainly | % YES

EV INTENTIONS TEND TO SLIGHTLY DECREASE AT A EUROPEAN LEVEL. A SPECIFICITY IN FRANCE WHERE CAR PURCHASE INTENTIONS IN GENERAL STRONGLY DECREASE

INTENTIONS TO ACQUIRE

% YES

	EUROPE									
At least one car	**-1**	+1	-10	-2	-1	-2	=	+4	=	-
A least one 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	-

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

XX significantly superior to 2022
XX significantly inferior to 2022

WHEN ZOOMING AMONG CAR PURCHASE INTENDERS, EV INTENTIONS ARE STILL STRONG

INTENTIONS TO ACQUIRE - BASE : CARS PURCHASE INTENDERS %

	EUROPE									
A least one new car	24 / 82	33 / 84	23 / 74	29 / 85	25 / 89	14 / 75	25 / 90	31 / 85	15 / 72	25 / 82
At least one EV	23 / 75	31 / 72	21 / 73	28 / 83	27 / 85	1 / 68	27 / 91	30 / 77	1 / 44	27 / 81
At least one second-hand car	21 / 75	21 / 64	22 / 76	21 / 69	22 / 75	14 / 80	22 / 66	31 / 81	18 / 80	25 / 81
At least one thermic car	21 / 72	23 / 72	24 / 73	22 / 64	17 / 66	15 / 71	20 / 64	32 / 80	19 / 90	22 / 68

Q25 – In the next 12 months, do you consider...?
Base : Intenders cars

Yes, certainly | % YES

AMONG CAR PURCHASE INTENDERS IN FRANCE, EV INTENTIONS ARE ACTUALLY GROWING

INTENTIONS TO ACQUIRE - BASE : CARS PURCHASE INTENDERS

% YES

	EUROPE									
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	-

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

XX significantly superior to 2022
XX significantly inferior to 2022

DEALERSHIPS ARE QUITE STABLE, EXCEPT IN PORTUGAL, AND INDEPENDENT GARAGES ARE GROWING IN EUROPE, WHILE ONLINE IS STILL QUITE POPULAR

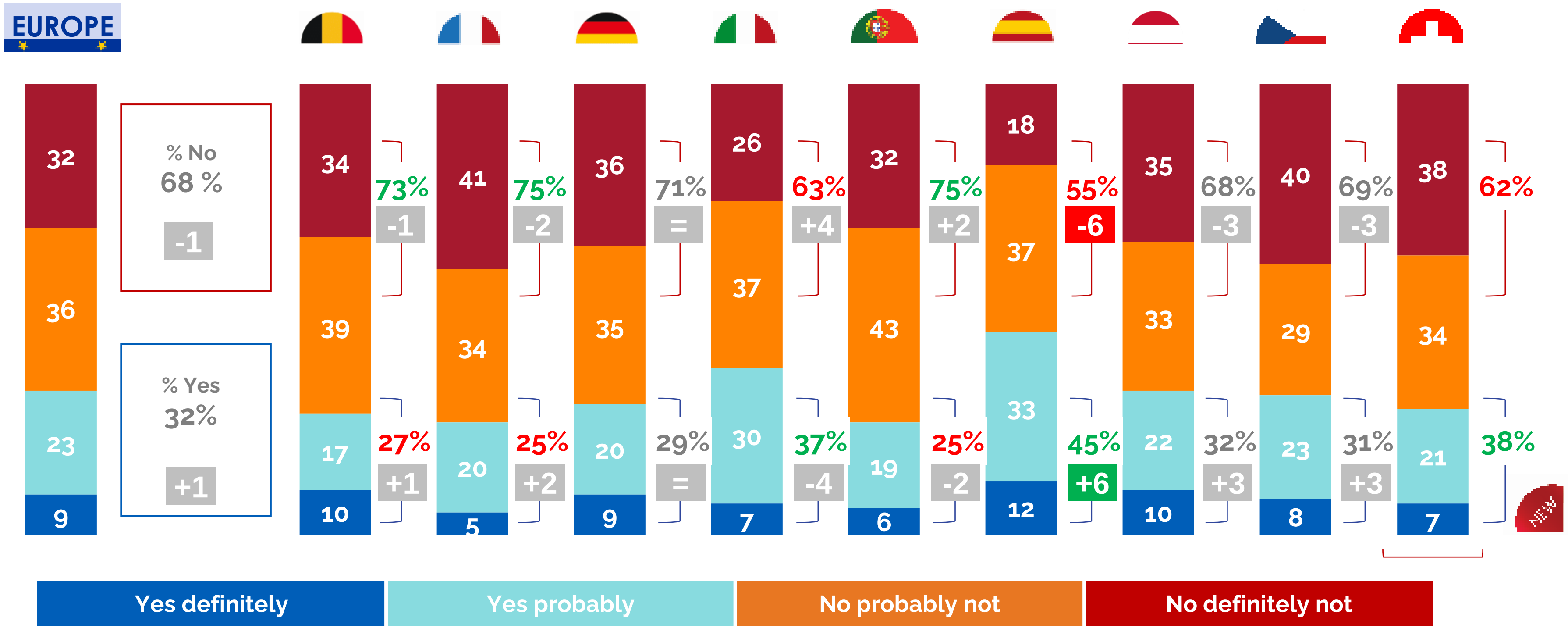
INTENDED PURCHASE CHANNEL %

	EUROPE																		
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

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

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.

INTENT TO STOP HAVING A CAR %



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

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.

2.3
FOCUS EV

NEW

PRIVATE CHARGING POINTS (WHETHER STANDARD OR FAST) ARE THE PREFERRED CHARGING MODES AMONG EV OWNERS

WAY OF CHARGING EV %

	EUROPE									
At home, using a standard private charging point	38 / 57	43 / 62	32 / 58	16 / 44	42 / 55	57 / 70	38 / 58	34 / 55	*Very low basis*	37 / 55
At home, using a fast private charging point	25 / 50	21 / 40	24 / 41	21 / 58	30 / 55	30 / 51	35 / 62	19 / 52		27 / 49
At public charging stations (supermarkets, gas station, etc.)	17 / 50	19 / 50	10 / 44	8 / 43	25 / 56	14 / 46	29 / 64	16 / 50		14 / 48
In your parking / building (collective charging point at home)	20 / 43	24 / 45	9 / 19	9 / 37	17 / 38	27 / 47	29 / 66	23 / 43		26 / 50
At work	18 / 38	25 / 47	5 / 15	13 / 45	29 / 48	14 / 31	18 / 49	12 / 31		19 / 33

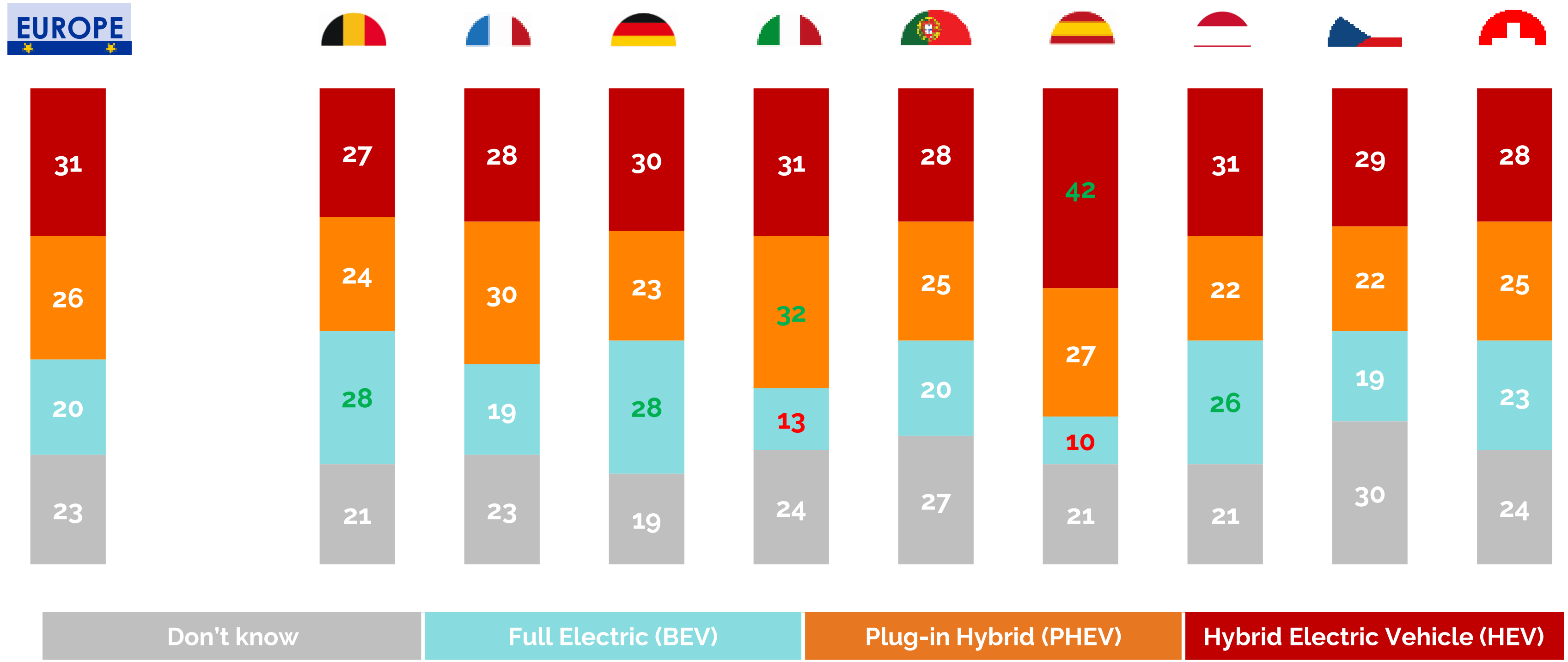
V24Q1 – How do you charge your EV most of the time?.
Base : EV owners – ***Warning : low bases between 40 to 60 respondents by country***

Daily or multiple times a week | % Use it

HYBRID VEHICLE IS THE MOST CONSIDERED VEHICLE AMONG EV INTENDERS, ESPECIALLY IN SPAIN. BELGIUM, GERMANY AND AUSTRIA ARE MORE OPEN TO CONSIDER BEV

NEW

TYPE OF EV CONSIDERED %



V24Q2. Specifically, what type of Electric Vehicle car are you considering to buy or lease?
Base : EV Intenders

THE FIRST REASON TO BUY AN EV IS STILL ECONOMIC (ESPECIALLY IN PORTUGAL), CLOSELY FOLLOWED BY ENVIRONMENTAL CONCERNS

REASONS FOR CONSIDERING EV %

	EUROPE									
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

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

** new items 2023*

XX significantly superior to European average
XX significantly inferior to European average
No evolution vs 2023 (list has changed)

PURCHASE COST REMAINS THE MAIN BARRIER TO BUY AN EV

BARRIERS TO EV %

	EUROPE									
NET Cost	51	50	62	56	56	48	43	49	60	35
High purchase costs	47	48	58	53	49	39	40	45	54	33
I'm afraid of maintenance costs	16	12	18	15	22	20	14	13	25	8
NET Charging points	26	24	22	34	27	17	22	30	29	26
No possibility to install charging points at your home	22	19	17	30	20	16	18	26	27	22
Not enough public charging points in the places where I go	11	13	10	10	8	7	7	13	12	14
No charging points at your office	9	9	9	10	14	5	8	9	7	10
Difficulty to make long-distance trips	25	23	32	21	29	21	27	26	25	21
I don't need a new car at the moment	58	58	54	60	49	58	59	65	50	67
Other	21	17	23	27	28	14	26	23	20	16

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

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

COMPARED TO LAST YEAR, THE GENERAL TREND IS EUROPE IS A DECREASE OF NEW CAR INTENTION (NOT PARTICULARLY EV).

BARRIERS TO EV

	EUROPE									
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	-

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

XX significantly superior to 2023
XX significantly inferior to 2023

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

TOP 3 ADDITIONAL SERVICES EV - % TOTAL MENTIONS

	EUROPE									
#1	Charging stations mapping 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%
2023	#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%
2023	#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%
2023	#3	#5	#2	#3	#3	#3	#3	#3	#3	-

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

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.

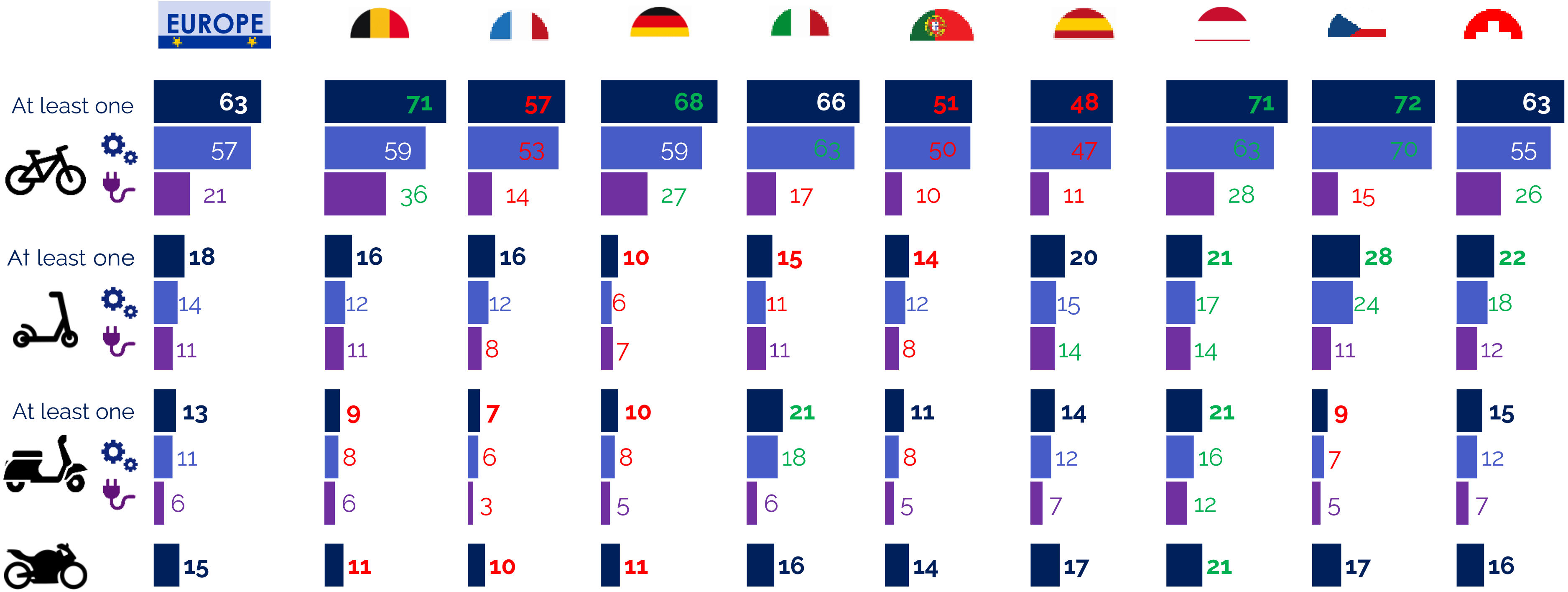
- ✓ The **motivations** to consider an EV are both **economic** (save on fuel costs) and **environmental** : both reasons are quite close to each other.
- ✓ **Barriers**, on the other hand, are more concentrated on **purchase costs**.

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

3.
MICRO MOBILITY

6 EUROPEANS OUT OF 10 DECLARE OWNING A BICYCLE, MOSTLY STANDARD ONES

MOTORBIKES / BICYLES OWNED - AT LEAST ONE %



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

BICYCLE OWNERSIP IS STABLE IN EUROPE, EXCEPT IN AUSTRIA WHERE ELECTRIC BIKES ARE INCREASING

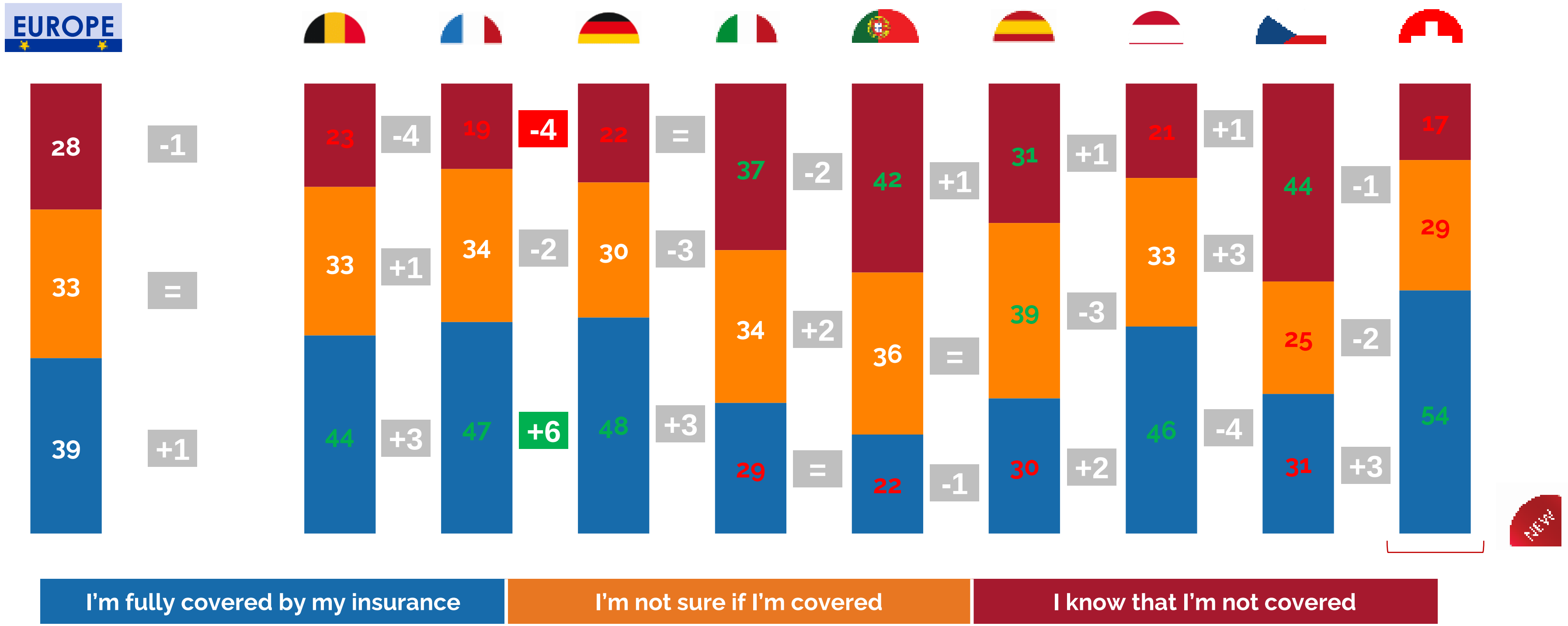
MOTORBIKES / BICYLES OWNED - AT LEAST ONE %

	EUROPE									
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	-

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

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

MICRO MOBILITY COVERAGE %



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

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

BICYCLE ASSISTANCE INTEREST %

	EUROPE									
At least one contract	**57**	**54**	**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 %

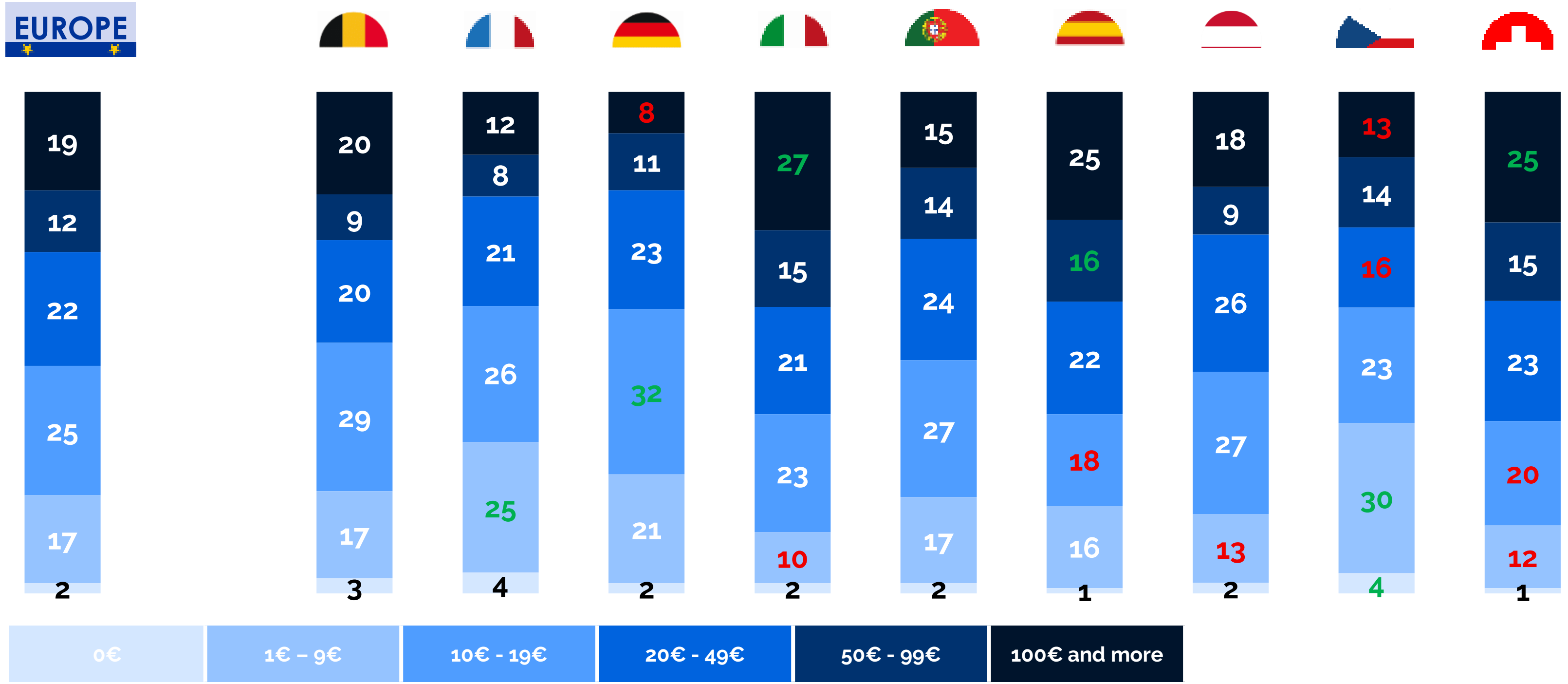
	EUROPE									
You want to be assisted in case of accident/breakdown	33	43	22	26	44	43	36	29	29	27
The price of your bicycle	27	22	34	30	22	20	19	28	38	31
The fact that it's a new one	20	20	24	23	17	16	19	24	13	21
You want a cover to restore your mobility if interrupted	19	14	19	19	17	20	24	19	18	20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

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

THE MAJORITY OF BICYCLE OWNERS WHO ARE INTERESTED IN ASSISTANCE WOULD BE WILLING TO PAY BETWEEN 10 AND 50€ PER MONTH

NEW

BUDGET PER MONTH FOR POTENTIAL BICYCLE ASSISTANCE %

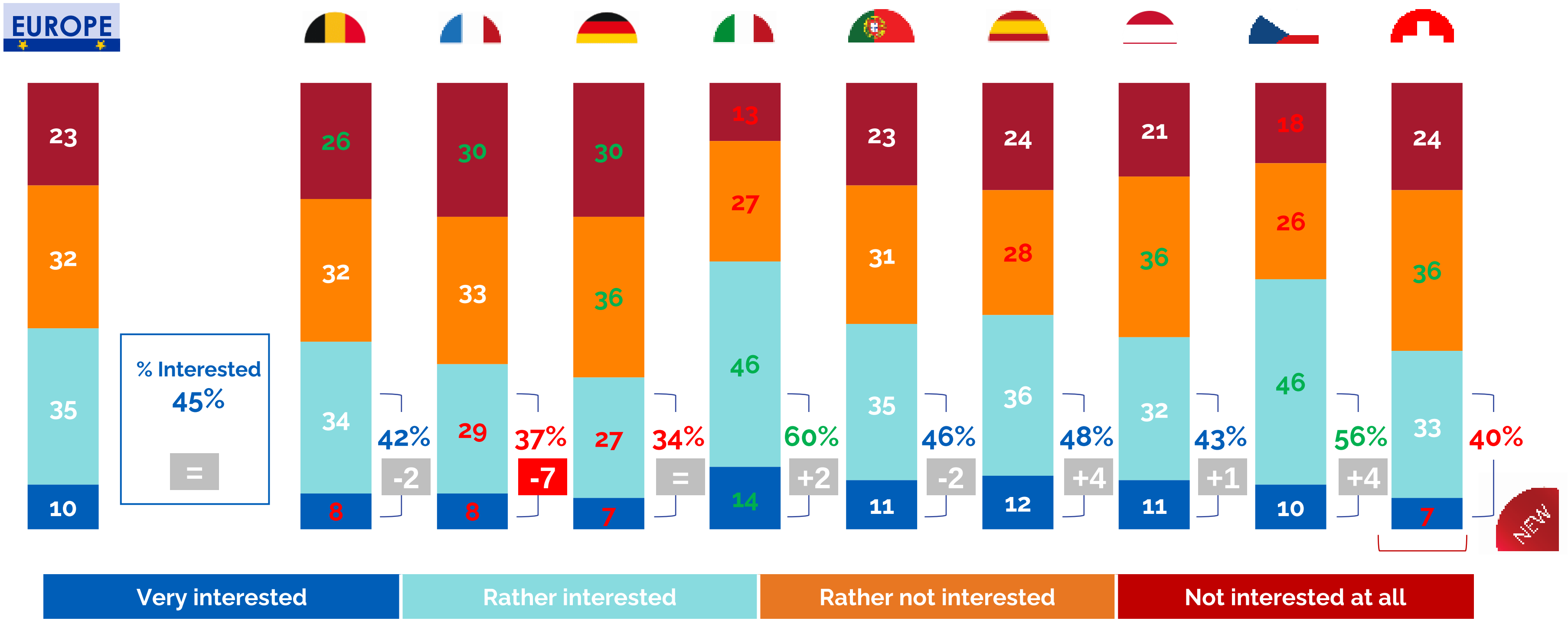


XX significantly superior to European average
XX significantly inferior to European average

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 INTEREST FOR PERSON-BASED INSURANCE IS STABLE AT A EUROPEAN LEVEL, HOWEVER DECREASING IN FRANCE.

INTEREST IN A PERSON-BASED INSURANCE %



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

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

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.

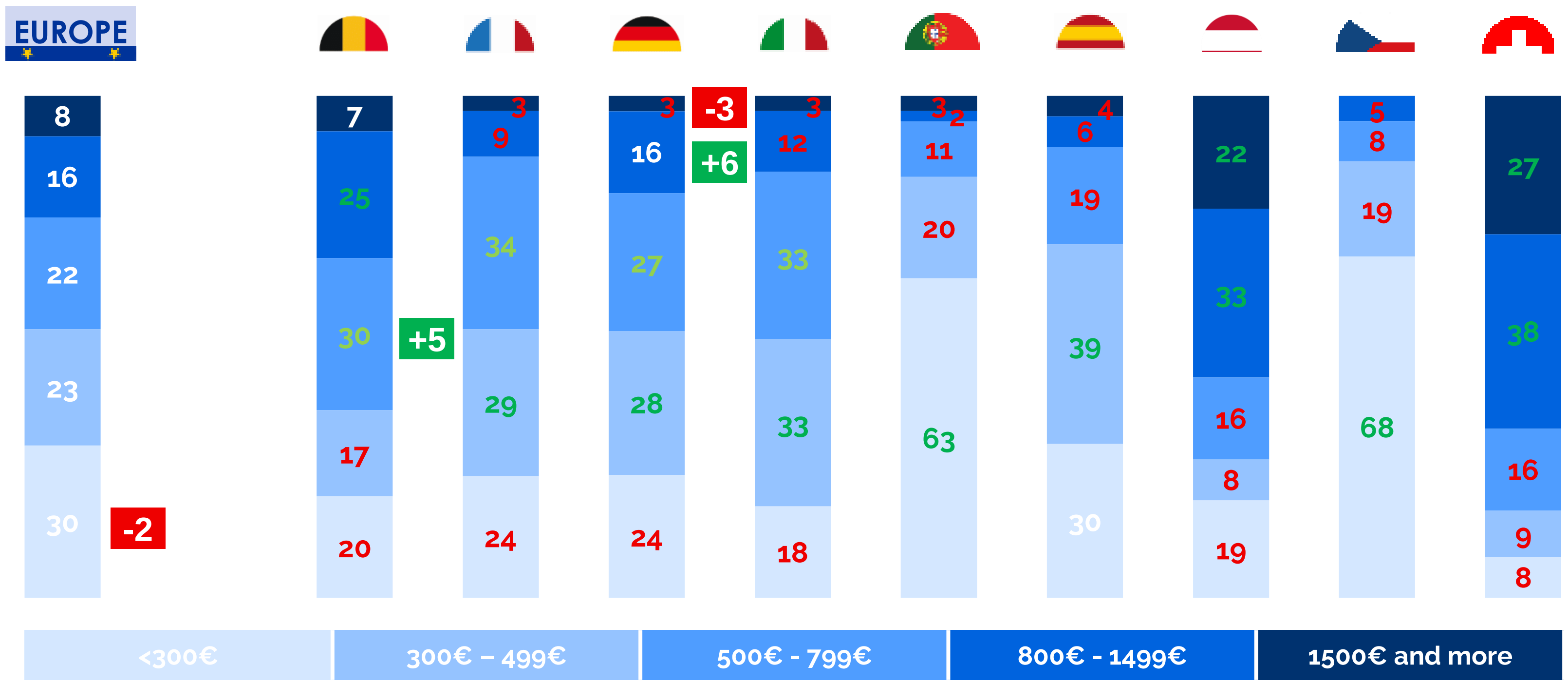
- ✓ **The potential for bicycle assistance or insurance remains high :** more than a half of bike owners would consider an insurance or assistance, mainly to be assisted in case of accident. The majority of those who are interested would be willing to pay between 10 and 50€ per month for this service.

- ✓ 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.

4.

CAR INSURANCE & ASSOCIATED SERVICES

THE CAR INSURANCE BUDGET IS THE HIGHEST IN SWITZERLAND AND AUSTRIA.



XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

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

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

IMPORTANCE OF SERVICES IN CAR ACQUISITION – TOTAL IMPORTANT %

	EUROPE									
Roadside assistance to your vehicle	**87**	86	88	86	88	91	89	83	86	87
Replacement car in case of breakdown, theft, accident	**83**	83	89	75	85	89	86	77	79	81
Steering to a preferred / agreed network of workshop for repairs	**78**	68	76	76	77	87	84	80	76	78
Mobility services for you and your passengers if your vehicle is immobilized	**76**	73	80	66	79	88	85	67	71	74
Stolen vehicle tracking	**76**	73	73	70	86	87	82	71	71	72
Tyre protection	**74**	70	70	68	80	83	81	72	69	71
Breakdown / emergency call	**70**	66	64	61	82	78	80	61	69	62
Car Pick-up & Delivery for maintenance / servicing	**64**	55	68	58	74	79	74	49	63	58
Assistance and services covering your other means of transports, meaning your micro-mobility devices	**50**	44	46	42	61	55	65	42	46	44

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

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

ALMOST THE SAME HIERARCHY OF SERVICES WHEN CHOSING A CAR INSURANCE

IMPORTANCE OF SERVICES IN CAR INSURANCE – TOTAL IMPORTANT %

	EUROPE									
Roadside assistance to your vehicle	**86**	86	90	79	89	92	90	79	86	85
Replacement car in case of breakdown, theft, accident	**83**	83	89	75	84	90	86	75	80	82
Mobility services for you and your passengers if your vehicle is immobilized	**76**	75	82	65	77	89	86	64	72	72
Stolen vehicle tracking	**74**	72	71	66	84	86	81	68	69	70
Tyre protection	**72**	70	69	62	78	83	80	65	66	69
Steering to a preferred / agreed network of workshop for repairs	**72**	68	78	60	71	85	83	63	75	67
Breakdown / emergency call	**68**	64	63	58	82	79	80	58	65	62
Car Pick-up & Delivery for maintenance / servicing	**67**	60	72	58	75	80	76	52	64	62
Assistance and services covering your other means of transports, meaning your micro-mobility devices	**51**	49	48	42	60	57	65	40	48	47

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

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

OVERALL, A VERY STRONG INTEREST FOR ROADSIDE ASSISTANCE

RECAP - IMPORTANCE OF SERVICES – TOTAL IMPORTANT %

IN CAR ACQUISITION

	EUROPE									
#1	Roadside Assistance 87% =	Roadside Assistance 86% =	Replacement car 89% =	Roadside Assistance 86% +3	Roadside Assistance 88% +1	Roadside Assistance 91% -2	Roadside Assistance 89% =	Roadside Assistance 83% -2	Roadside Assistance 86% =	Roadside Assistance 87%
#2	Replacement car 83% -1	Replacement car 83% -1	Roadside Assistance 88% -1	Steering to a preferred 76% +1	Stolen vehicle tracking 86% =	Replacement car 89% -1	Replacement car 86% +1	Steering to a preferred 80% =	Replacement car 79% -2	Replacement car 81%
#3	Steering to a preferred 78% +1	Mobility services 73% +2	Mobility services 80% -1	Replacement car 75% -1	Replacement car 85% =	Mobility services 88% +2	Mobility services 85% +1	Replacement car 77% -2	Steering to a preferred 76% +5	Steering to a preferred 78%

IN CAR INSURANCE

	EUROPE									
#1	Roadside Assistance 86% =	Roadside Assistance 86% +2	Roadside Assistance 90% -1	Roadside Assistance 79% +2	Roadside Assistance 89% +2	Roadside Assistance 92% -1	Roadside Assistance 90% -1	Roadside Assistance 79% -1	Roadside Assistance 86% +3	Roadside Assistance 85%
#2	Replacement car 83% =	Replacement car 83% -2	Replacement car 89% +1	Replacement car 75% +1	Replacement car 84% +1	Replacement car 90% -1	Replacement car 86% +1	Steering to a preferred 75% =	Replacement car 80% =	Replacement car 82%
#3	Mobility services 76% +1	Mobility services 75% +4	Mobility services 82% +1	Stolen vehicle tracking 66% =	Stolen vehicle tracking 84% +1	Mobility services 89% =	Mobility services 86% =	Stolen vehicle tracking 68% -2	Steering to a preferred 75% +3	Mobility services 72%

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

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE, INCREASING IN PORTUGAL WHERE DIGITAL CHANNELS ARE LESS POPULAR THAN LAST YEAR

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

	EUROPE																		
Talking to a human operator via phone call	**86**	**+3**	87	+2	90	+1	87	+3	84	=	87	+26	83	-5	85	-2	85	+2	85
Digitally as a self-service through an app or webapp	**40**	**+1**	42	+2	48	+4	40	+4	40	+1	36	-12	42	+5	35	+1	43	-1	35
Digitally as a self-service through WhatsApp	**40**	**-2**	40	+3	34	+3	32	-4	48	-2	37	-11	50	-1	38	-2	36	=	45
Talking to virtual agent: a voice bot via phone call	**34**	**-2**	31	-7	28	-7	42	-2	28	+1	40	-4	25	=	42	+3	36	-2	35

NEW

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

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE, INCREASING IN PORTUGAL WHERE DIGITAL CHANNELS ARE LESS POPULAR THAN LAST YEAR

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

	EUROPE																			
Talking to a human operator via phone call	**88**	**+4**	88	+3	94	+3	86	-1	85	+1	89	+25	87	-1	87	-1	88	+1	87	
Digitally as a self-service through an app or webapp	**39**	**=**	41	+1	43	=	36	+4	37	+1	34	-13	39	+1	38	+3	41	+1	37	
Digitally as a self-service through WhatsApp	**39**	**-3**	39	-2	36	+3	33	-4	49	-3	36	-10	47	-2	34	-5	35	=	40	
Talking to virtual agent: a voice bot via phone call	**35**	**-1**	31	-3	28	-6	45	=	29	+1	41	-2	28	+2	41	+2	36	-2	37	

Q48B2 - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE, INCREASING IN PORTUGAL WHERE DIGITAL CHANNELS ARE LESS POPULAR THAN LAST YEAR

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

	EUROPE																			
Talking to a human operator via phone call	**88**	**+4**	90	+2	92	=	88	+2	84	-2	88	+27	83	-5	89	+1	89	+3	85	
Digitally as a self-service through an app or webapp	**40**	**+2**	42	+1	45	+4	40	+4	39	+3	37	-11	42	+6	38	+4	42	+3	37	
Digitally as a self-service through WhatsApp	**39**	**-4**	38	=	35	+2	30	-5	49	=	35	-12	48	-4	35	-5	35	-1	42	
Talking to virtual agent: a voice bot via phone call	**34**	**-1**	30	-4	28	-7	43	=	28	-1	40	-4	27	+4	39	+1	34	-5	36	

Q48B3 - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

WHATEVER THE SITUATION, STRONG PREFERENCE FOR HUMAN OPERATORS OVER THE PHONE, INCREASING IN PORTUGAL WHERE DIGITAL CHANNELS ARE LESS POPULAR THAN LAST YEAR

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

	EUROPE																		
Talking to a human operator via phone call	**86**	**+3**	89	+3	90	+1	86	+1	81	-3	84	+22	86	=	86	-1	85	+3	85
Digitally as a self-service through an app or webapp	**41**	**=**	40	-2	45	+2	38	+1	42	+3	39	-7	42	+2	36	+1	43	-1	40
Digitally as a self-service through WhatsApp	**40**	**-2**	42	+3	36	+3	34	-2	49	-1	38	-9	47	-3	36	-2	37	-1	42
Talking to virtual agent: a voice bot via phone call	**34**	**-1**	30	-3	28	-6	41	-1	28	=	39	-6	25	+1	42	+2	36	=	34

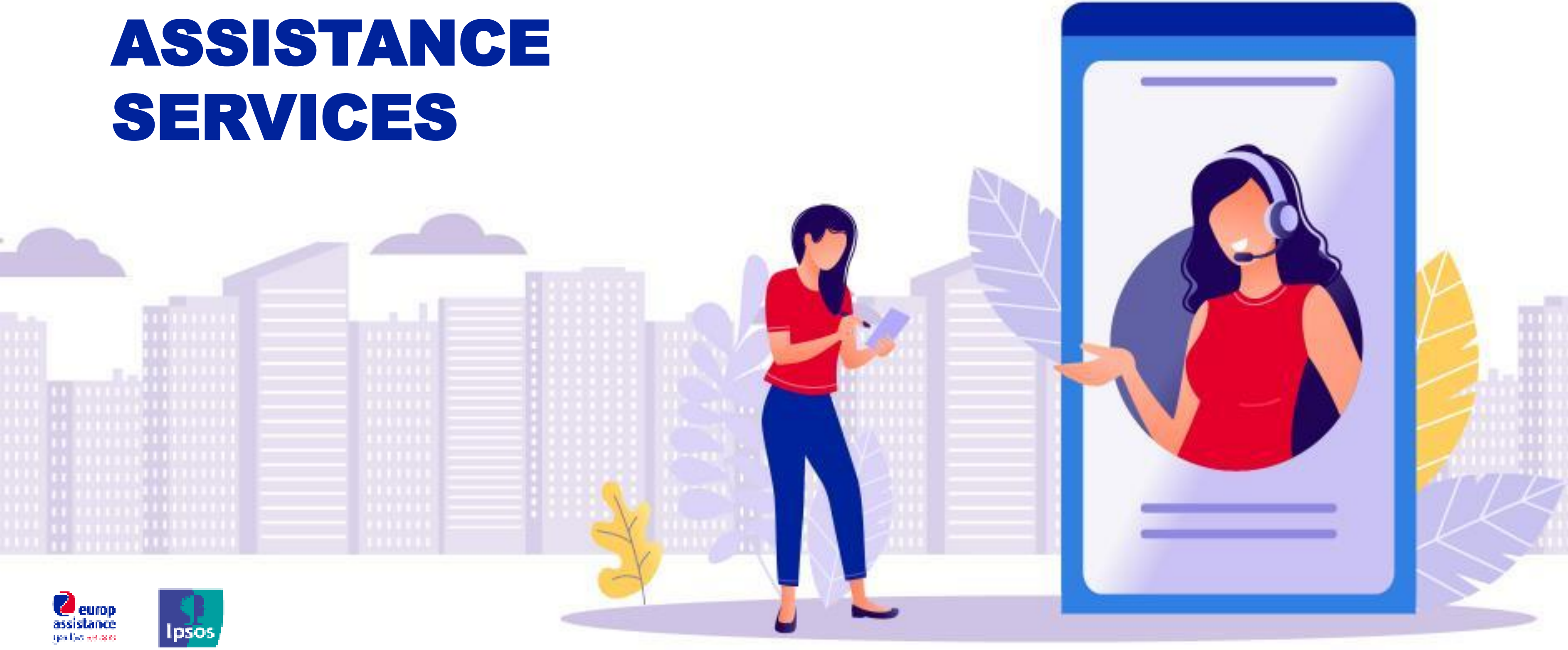
Q48B4 - Considering that you can reach out to your roadside assistance service provider through different modes of communication, what would be your preferred channel to contact your assistance in the following situations ?
Base : Car owners

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

KEY LEARNINGS

- ✓ **Car insurance budget shows disparities depending on the country** (higher budgets in Switzerland and Austria, but much lower in Czech Republic and Portugal).
- ✓ **Roadside assistance is particularly important when acquiring a car or choosing an insurance**, as well as access to a replacement car in case of problem.
- ✓ And whatever the situation (facing a flat tire or flat battery, an accident, in their own country or abroad), **strong preference for human operators over the phone.** This is increasing in Europe, especially in Portugal where digital channels are less popular than last year.

5.
ASSISTANCE SERVICES



TIME TO ARRIVAL OF THE PATROL/TOWING TRUCK IS STILL THE PREFERRED SERVICE

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

	EUROPE																			
Time to arrival of the patrol / towing truck on the spot of the incident *(First + second)*	**28** (57)	**-3**	27	-7	30	+4	31	-5	24	0	27	-5	31	-4	29	-6	21	-5	32	
Time to pick-up your incoming call	**24** (40)	**-3**	19	=	31	-7	16	-2	31	-6	31	-3	25	-3	19	=	17	-2	21	
Ability of the technician to repair the incident on your vehicle directly on the spot of the incident	**23** (48)	**-3**	30	-4	21	=	29	-5	20	-1	16	-2	19	-3	26	-7	28	-2	24	
Ability to fix your problem with your vehicle over the phone directly	**14** (29)	**-1**	14	+1	11	-4	12	=	14	-4	19	+3	14	-1	11	-2	24	-1	11	
Visibility on towing truck's estimated time of arrival*	**11** (27)	**-**	10	-	7	-	12	-	11	-	7	-	11	-	15	-	10	-	12	

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

** new item 2024*

XX significantly superior to European average / to 2023
XX significantly inferior to European average / to 2023

ROADSIDE ASSISTANCE AND REPLACEMENT CAR ARE STILL THE MOST VALUED SERVICES

IMPORTANCE OF ASSISTANCE SERVICES – VERY IMPORTANT %

	EUROPE									
Roadside assistance to your vehicle	**42**	43	49	35	42	45	46	39	35	39
Replacement car	**39**	42	54	28	38	46	39	33	32	36
Repair on the spot	**31**	33	33	24	34	34	35	28	32	26
Delivery of the rental car directly at the place*	**30**	28	38	23	29	39	34	28	29	25
Mobility services for you & passengers if your vehicle is immobilized	**29**	27	38	19	26	41	39	22	21	26
Over the phone resolution / car problem fixing	**27**	21	28	20	27	31	30	26	33	23
Access to garages which quality is certified	**27**	25	36	20	26	34	30	27	23	24
Recommendation from your roadside assistance company of a garage*	**27**	22	33	20	27	33	29	26	23	21
Tyre protection	**24**	21	22	19	24	31	31	23	23	20
Car Drop-off	**24**	21	30	17	27	31	29	18	19	22
Hotel accommodation during the repairs of your car	**22**	21	32	17	21	25	29	21	14	21
Access to financing solutions for vehicle repairs	**19**	16	22	11	20	22	23	15	22	17

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

** new item 2023*
XX significantly superior to European average
XX significantly inferior to European average

NO MAJOR EVOLUTIONS IN THE RANKING OF SERVICES

IMPORTANCE OF ASSISTANCE SERVICES – VERY IMPORTANT %

	EUROPE									
Roadside assistance to your vehicle	**+2**	+2	+2	+1	+4	+7	+2	-3	+3	-
Replacement car	**+1**	+4	+3	-2	+2	+2	-1	-1	-1	-
Repair on the spot	**+1**	+3	=	-2	+4	+4	-1	-6	+3	-
Delivery of the rental car directly at the place*	**-**	-	-	-	-	-	-	-	-	-
Mobility services for you & passengers if your vehicle is immobilized	**+2**	+2	+4	=	+2	+7	=	+2	+4	-
Over the phone resolution / car problem fixing	**+1**	=	=	-2	+2	+4	+3	=	+5	-
Access to garages which quality is certified	**+1**	+1	+4	-3	+1	+5	+2	-2	+5	-
Recommendation from your roadside assistance company of a garage*	**-**	-	-	-	-	-	-	-	-	-
Tyre protection	**+1**	-1	+1	=	=	+5	+2	-1	+3	-
Car Drop-off	**+1**	+2	+1	-1	=	+3	+1	=	+4	-
Hotel accommodation during the repairs of your car	**+1**	+5	+3	+2	-4	+3	+2	+2	+1	-
Access to financing solutions for vehicle repairs	**+2**	+4	+2	-4	+2	+2	+5	-2	+4	-

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

** new item 2023*
XX significantly superior to 2023
XX significantly inferior to 2023

AN INCREASED INTEREST IN ALL PICK-UP AND DELIVERY SERVICES

INTEREST IN PICK UP AND DELIVERY SERVICES – TOTAL INTERESTED %

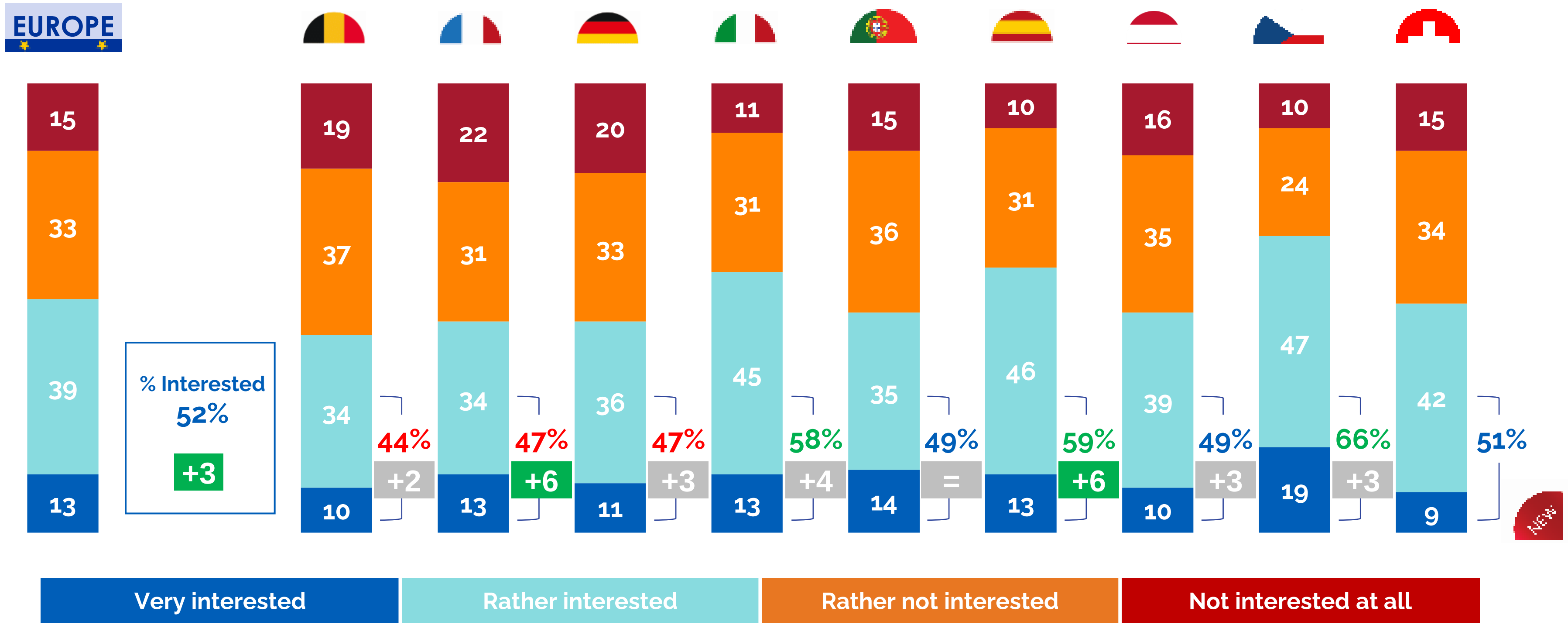
	EUROPE																			
Have your vehicle repaired, maintained or serviced by a WS / garage	72	+6	67	+8	70	+7	64	+3	78	+4	78	+2	82	+6	67	+6	75	+11	71	-
Take delivery of your vehicle at your doorstep	63	+5	55	+7	65	+6	52	+3	67	+5	71	+3	72	+9	52	+4	72	+5	57	-
Sell your vehicle, picking the vehicle from your doorstep and deliver it to the buyer	55	+5	48	+4	51	+2	45	+3	63	+5	57	+1	66	+9	49	+6	67	+8	49	-
Test drive a vehicle at your doorstep	55	+5	48	+5	51	+4	49	+8	60	+6	58	+2	62	+7	48	+4	67	+4	48	-

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

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

INTEREST IN EUROPE FOR ALTERNATIVE MOBILITY SOLUTIONS IS STILL GROWING, MAINLY IN SPAIN AND FRANCE

INTEREST FOR ALTERNATIVE MOBILITY SOLUTIONS (CAR OWNERS) %



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

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

THE AVERAGE ACCEPTABLE MOBILITY BUDGET ARE GROWING, IT WOULD BE AROUND 156€ INSTEAD OF A REPLACEMENT CAR AND 115€ INSTEAD OF HAVING A TAXI, WITH DIFFERENCES BY COUNTRY. SWITZERLAND IS MUCH HIGHER (HIGHER COST OF LIVING)

ACCEPTABLE MOBILITY BUDGET INSTEAD OF REPLACEMENT CAR - AVERAGE

EUROPE

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

156 € *+31€ vs 2023*

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

115 € *+32€ vs 2023*

Country	vs. replacement car	Change	vs. taxi	Change
Belgium	171 €	+46€	114 €	+28€
France	157 €	+48€	139 €	+67€
Germany	196 €	+27€	120 €	+9€
Austria	189 €	+18€	142 €	+26€
Italy	130 €	+29€	84 €	+15€
Portugal	149 €	+38€	111 €	+53€
Spain	110 €	+10€	86 €	+21€
Czech Republic	116 €	+48€	86 €	+33€
Switzerland	234 €		176 €	

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

Exchange rate applied : 1 € = 25,12 CZK

1 € = 0,93 CHF

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

… AND PUBLIC TRANSPORTATIONS AND RENTAL CAR WOULD BE THE MOST CONSIDERED OPTIONS

NEW

MOBILITY OPTIONS PREFERRED WITH THIS BUDGET AVAILABLE %

	EUROPE									
Public transportations	**46**	42	40	46	40	48	48	46	47	58
Rental car	**41**	38	48	49	38	38	32	45	39	50
Walking	**29**	30	36	8	33	30	41	10	43	23
Taxi / VTC	**25**	21	22	23	20	43	25	33	17	21
Car sharing	**15**	15	11	15	15	16	17	14	14	12
Personal Bike or stand scooter	**12**	16	8	15	14	7	10	13	15	12
Shared bicycle	**6**	11	6	6	6	2	5	7	5	6
Shared stand scooter	**4**	6	3	4	4	2	4	8	3	5
Moped sharing / shared two-wheels	**3**	3	2	3	4	3	4	6	2	2
Other	**1**	2	1	1	0	0	0	1	1	1

V24Q4. With this mobility budget available, which mobility options and transportation means would you consider using the most?
Base : Car owners interested by mobility budget

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

KEY LEARNINGS

- ✓ Half of Europeans have already experienced roadside assistance services.
- ✓ The most important service commitment is the **time to arrival of the patrol / towing truck** on the spot.
- ✓ **Roadside assistance, repair and replacement car** are still the most valued assistance services in most countries
- ✓ **Pick-up and delivery services generate an increased interest** this year.
- ✓ **Interest in Europe for alternative mobility solutions is still growing** (mainly in Spain and France).

QUESTIONS?

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