

Europeans reshape their mobility habits, between economic and environmental concerns

Paris, January 2023 – Europ Assistance (“EA”) today announced the international findings of their 1st edition of the Auto & Mobility Barometer. The survey was conducted by Ipsos, a global market research firm, among 6,000 people across 6 countries in Europe: Belgium, France, Germany, Italy, Portugal, Spain. It tracks Europeans mobility habits. The survey was taken between November 29th and December 9th, 2022

Cedric Pauly, Global Head of Mobility Business Line : “ Since the covid crisis, the mobility sector has reached a critical juncture where environmental issues have changed Europeans' behaviors and practices. Through our Auto & Mobility Barometer, we have observed a real revolution in soft mobility, both in people's minds and in their practices. As a leader in assistance, our role is to understand and support these transformations as closely as possible, while promoting societal values that are part of our DNA.”

Anne-Laure Alviset, Global Mobility Marketing Director : “ This study confirms our intuitions and observations of a sector that is undergoing major changes. Faced with environmental and energy challenges, Europeans, in a fairly uniform way by country, have switched strongly to soft mobility such as bicycles and scooters (trotinettes). Formerly seen as alternatives, these means of travel are becoming credible and long-term solutions that the entire ecosystem must take into account. This is the work we are doing at Europ Assistance, to offer tailor-made support adapted to these new uses”.

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

Since Covid and multiple lockdown periods, **Europeans have adapted their way of life, including their mobility habits.**

Some “softer” modes of transportation are use more frequently than before: walking (31% of Europeans say they walk more often than before Covid), bicycles (30% of electric bikes users use it more frequently, 25% for standard bikes), but also stand-scooters (28% of personal stand scooter user do it more often).

On the contrary, **some transportation modes involving proximity with strangers have seen a decrease in their use:** car-pooling (27% of users do it less frequently), public transportation (25% less frequently), taxi or car-sharing following the same trend.

Changes in mobility habits were mainly triggered by two dimensions: **environmental concerns, and cost**, reflecting the current preoccupations of citizens about both ecology and inflation.

Indeed, two thirds of Europeans (64%) say they had to review their mobility habits due to inflation and fuel costs. The same proportion say that they have already changed their daily mobility habits to be greener.

Car usage, however, remained quite stable with the same proportion of users using it more frequently than less frequently (16% each, the remaining 68% saying their use did not change).

Overall cars remain widespread in Europe: almost 9 out of 10 Europeans (88%) still own a car in their household.

A future without having my own car ? Possible for some, impossible to others...

Overall, **1 European car owner out of 3 could (32%) consider not having a personal car in the future** – however, only 8% could “definitely” do it.

However when zooming on specific populations, differences emerge on relationship to car ownership : younger Europeans are keener to abandon personal cars (40% say they could among those aged 18 to 34 years-old, with 12% “definitely”), and people living in large cities are also more inclined to do so, having access to more mobility alternatives (35% could stop owning a personal car in cities, vs 31% in smaller towns and rural areas). There are also differences between countries: more reluctance to give up cars in France and Belgium, less in Italy and Spain.

Ecological conscience is already well implanted: half of Europeans (54%) feel bad about the ecological footprint linked to the usage of their car, but only 15% “strongly agree”, with much higher scores in Portugal and Spain (75% agree).

...while some barriers for Electric Vehicles adoption still need to be overcome

Most current cars are still ICE today (89% of cars used most often), while hybrid cars represent 5% and EV barely 1%. When considering future intentions, however, a real interest for hybrid and Electric Vehicles: almost one third (31%) of Europeans could consider buying and EV / Hybrid car, and 9% “certainly”.

However, **some strong barriers remain for developing this use of Electric Vehicles: the first one being cost** – in a context of inflation and economic crisis – purchase cost is the first barrier mentioned by 52% of those who don’t consider EVs, but maintenance costs also appear (18%).

Charging points also represent an important source of concern (32% of mentions for difficulties to install them at home or lacking them at work). Finally, Europeans are not yet convinced by EV autonomy for long-distance trips (30% of mentions).

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

Almost 2 out of 3 Europeans (63%) own at least one bike in their household, and almost **half use bicycles at least once in a while**, whether on weekdays or weekends (46%).

Electric bikes are already adopted by 1 out of 5 Europeans (20% use a personal electric bike), especially among 18-34 years-old (30%). Differences appear between countries: e-bikes are less common in Spain and Portugal (16% of use each), whereas Belgium and Germany have already adopted them more widely (respectively 25% and 24%).

Stand-scooters keep installing themselves: 17% of owners on average in Europe (higher in France and Spain), split quite evenly between standard (13% owners) & electric scooters (11%). Young Europeans are more adept of stand-scooters (28% of owners among 18-34 years-old).

Micro-mobility and bicycles use has been intensified since Covid: one third (33%) of micro-mobility / bike users started using them regularly during or since the Covid crisis.

However, safety and coverage appear to be heterogeneous: if two thirds (62%) of users usually wear helmets on bike/scooters, 38% never wear any protection. Regarding coverage in case of accident, only one third of users are sure to be covered by their insurance while using those vehicles, the other 2 thirds not sure or not covered.

In the end, **a need of coverage for all uses of mobility: more than 4 out of 10 Europeans could be interested by a person-based insurance when it comes to mobility.** This is especially true among young people (18-34: 53% interested), bicycle users (56%), stand-scooter users (70%).

ABOUT EUROP ASSISTANCE

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ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS: FP www.ipsos.com