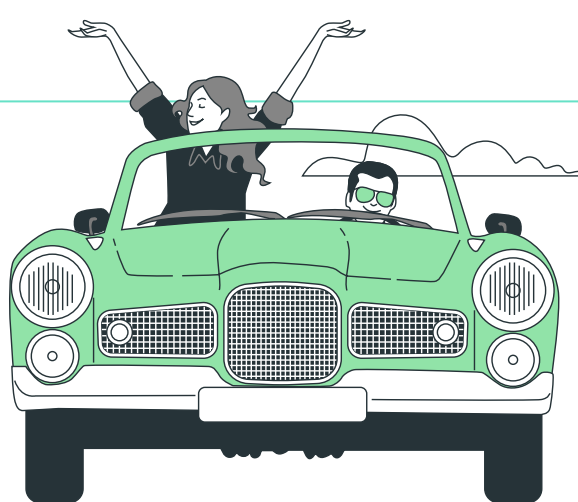


2025 MOBILITY BAROMETER



EUROPEANS EMBRACE GREENER, MULTIMODAL TRANSPORT

01



• **INTERNAL COMBUSTION ENGINE VEHICLES STILL RULE THE ROADS**

86%

of personal cars are still powered by internal combustion engines.

• **PLUG-IN HYBRID VEHICLES ARE ON THE RISE**

Notable increases in **Germany, Italy, Portugal, & Spain** (+2 pts vs. 2024)

• **INTEREST IN EVS SLIGHTLY DECLINING**

1 in 4 Europeans (27%)

are considering an electric vehicle, down from **29% in 2024 & 31% in 2023**

«Cars still dominate, but alternatives gain ground»

• **ALTERNATIVE POWERTRAINS ARE GAINING GROUND**

13% up from 10% in 2023.

«Highest adoption in **Italy (21%)** and **Switzerland (16%)**»

«Significant growth in **Austria (+3 pts vs. 2024)** and **Spain (+4 pts vs. 2024)**.»

• **DECLINING RELIANCE ON PERSONAL CARS**

Only **14%** of Europeans plan to use their car **more frequently** in the future.

16% intend to **reduce** their car usage.

• **ACCELERATION OF ELECTRIC & SOFT MOBILITY**

38% of Europeans use electric bikes **more frequently** than 5 years ago

Growth is especially strong in **France, Belgium, and Germany**

02



«The rise of sustainable mobility: a shift in transportation habits»

• **WALKING & PUBLIC TRANSPORT GAINING MOMENTUM**

While **84%**

still rely on personal cars, **walking** and **public transport** are on the rise.

More frequent usage compared to five years ago

35% for walking

33% for public transport

03



«EV adoption slows: Overcoming the Cost Barrier»

OR NOT!

• **DECLINING INTEREST**

1 in 4 Europeans

still consider purchasing an EV, but interest is slightly decreasing, especially in **France** and **Portugal**.

• **KEY MOTIVATIONS FOR BUYING AN EV**

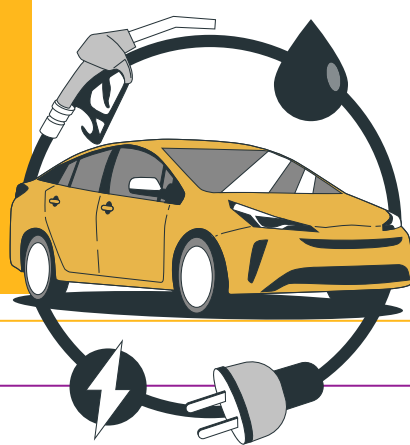
40% are motivated by **fuel cost savings**.

35% prioritise **environmental benefits**

• **MAIN BARRIERS TO EV ADOPTION**

51% cite **high costs** as the primary obstacle.

26% are concerned about **charging infrastructure**.



• **MULTIMODAL MOBILITY ON THE RISE**

86% of Europeans

use a car, but many combine multiple modes:

54% also use **public transport**.

48% also use **bicycles**.

• **INFRASTRUCTURE DRIVING CHANGE**

Improved **multimodal networks & platforms** are facilitating these transitions.

32% of Europeans

say better infrastructure would encourage them to use **bicycles** or **scooters** more often.

• **PERSONAL CAR OWNERSHIP LOSING APPEAL**

1 in 3 European

car owners are open to giving up their vehicle in the future.

Strongest trends in **Spain** (45%, +6 pts vs. 2024), **Italy** (37%) and **Switzerland** (38%)

This shift underscores the rise of **shared mobility, public transport, and hybrid solutions**.

• **EXPANSION OF SHARED MOBILITY**

Car-sharing & carpooling are growing, especially in:

Portugal 31% use car-sharing (+5 pts vs. 2024)

Austria 31% use carpooling (+4 pts vs. 2024)



«Multimodal mobility: the new normal for transportation?»