

# THE IPSOS MOBILITY REPORT

A 31-Country Global  
Advisor Survey

March 2026

# Introduction

Welcome to the *Ipsos Mobility Report*, which explores how mobility choices shape our societies—from access and inclusion to safety, liveability, and climate impact.

Around the world, mobility is both deeply personal and profoundly public: it determines who can reach jobs, schools, and care, how our streets feel, and whether we meet environmental goals.

As we see in this report, many people remain car-reliant: on average, 43% say living without a car would be impossible.

At the same time, public transport is widely viewed as accessible (62% on average across 31 countries) and safe

(also 62%), though affordability and access lag in rural areas.

Younger people and urban residents are more open to alternatives, pointing to a future where walking, transit, and shared options play a larger role.

Choice of mode matters for the planet and for public space. Nearly half (46%) would prefer to use public transport over personal cars for environmental reasons, 67% support dedicated cycling lanes, and 61% say they would choose active travel to stay healthy.

Safety is a shared priority: 66% support stricter traffic laws, with strong backing for measures that protect pedestrians and cyclists.

Technology is reshaping mobility, but acceptance is uneven.

Globally, 47% find driving an electric vehicle appealing, and 53% expect many consumers to adopt EVs by 2030—yet enthusiasm is lower in North America and Europe, and on average drops outside cities and among older people. Views on autonomy are split (36% would feel safe in a self-driving car; 36% would not), reflecting persistent trust and data-privacy concerns.

There is much food for thought here. We look forward to discussing what this means for your country—or your business.

# 36%

As many people say they would feel safe in a self-driving car as say they would not (both 36%).

# Key findings

# 43%



on average across 31 countries think **living without a car is impossible**.

Americans are most likely to feel this way (**65%**).

# 47%



say driving an **EV is appealing to me**. Support for EVs is lower in North America (**35%**) and Europe (**38%**).

# 36%



say they would **feel safe in a self-driving car**, while **36%** say they would not.

# 66%



say they would support **stricter traffic laws** to support road safety.

# 67%



say they support the use of **dedicated cycling lanes**.

# Summary

## Having a car is not just an essential choice but an emotional one too

Across 31 countries 43% of drivers say it would be impossible for them to live without a car. English-speaking and European countries are the most likely to feel this way, with 65% of Americans thinking they couldn't live without a vehicle.

The desire to drive a car or pick up truck goes beyond a need to do so. Forty-three per cent also say they could live without their vehicle but prefer to have it.

For most it is their favourite way of getting around. In 22 of the 31 countries surveyed in our report people say driving is their favourite mode of transport.

## For electric and self-driving cars, countries matter

On average people are more split on self-driving cars. As many say they would feel safe in one as would not. Europeans and North Americans are more likely to feel unsafe.

This trend continues with electric vehicles with Belgium, France, Germany, the US and Canada, all more likely to say driving an electric car is not appealing to them than it is. LATAM and Asia is where interest is greatest.

However, across 31 countries there is support for introducing benefits to increase the uptake in EVs. People in all countries surveyed are more likely to support reducing road user charges to encourage the purchase of EVs than not.

## The process of buying a car is not immune to geo-politics

The nationality of a carmaker is an issue for many around the world. Almost one in two (48%) across 31 countries say they would avoid purchasing a car made by an automaker from specific. Japan and South Korea are the most likely to agree to this statement. Two-thirds in both countries say they would avoid a carmaker from a specific country. When we asked those in Japan and South Korea who would avoid a carmaker which country they would steer away from, China came out top.

Elsewhere we see tensions between neighbours play a role. Forty-eight per cent of Canadians, who would avoid a carmaker, would not purchase an American car.



# What this means for...



## Automakers

- 1. Cars remain emotionally and practically essential.** The data shows that 43% of car owners say living without their vehicle would be "impossible," and driving is the favourite mode of transport in 22 of 31 countries. This goes beyond utility – people genuinely enjoy driving. There's deep emotional attachment and loyalty to personal vehicle ownership. Offering the opportunity to lean into the experiential/emotional aspects of car ownership in design, marketing, and brand messaging.
- 2. Acceptance and apathy of EVs.** Asia and Latin America show strong openness to electric vehicles, while key Western markets—France, the US, Canada, and Germany—actually have more people rejecting the idea of driving an EV than embracing it. Brands need to recognise that their most mature markets may require longer ICE and hybrid transition periods, while emerging markets in Asia and LATAM could leapfrog to EV adoption more quickly. China's dominance (67% appeal, 73% expecting mass adoption by 2030) makes it the flagship market for EV innovation and volume.
- 3. Brand origin is now a vulnerability.** This shows how quickly diplomatic disputes translate into consumer rejection. Where your brand is from is no longer just a marketing asset—it's a potential liability. Across 31 countries, Chinese (41%), Indian (38%), and American (24%) vehicles are the most likely to be avoided.

# What this means for...



## Governments

- 1. Road tolls seen as a way to encourage more sustainable transport options.** On average across 31 countries 46% support congestion pricing as a way to promote sustainable transport habits. Support rises to one in two for those who live in an urban area and among Gen Z and Millennials.
- 2. There is support for using car alternatives in urban areas.** While 48% of drivers who live in an urban area say they prefer to use their car, they admit it would be possible for them to give it up. Two-thirds of people in an urban area say public transport is accessible and the same say they would prefer to use transport forms like walking and cycling to keep themselves active. To add to this there is widespread support across countries and from rural and urban dwellers for more cycle lanes.
- 3. Belief lower speed limits would improve road safety.** More than one in two (55%) say they are concerned about road safety in my area and two-thirds (66%) support stricter traffic laws. Government has a strong social license to take action in this area and reducing speed limits, especially on residential streets has the public's backing (70%).

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# The death of car ownership?



# Are people willing to give up their car?

Across 31 countries 39% say their primary mode of transport is by car. It is highest in New Zealand (66%) and the US (64%). For car and truck owners, their vehicle is seen as an essential part of their life. On average across 31 countries 43% say it would be impossible to live without their car. While the same proportion say it would be possible for them to live without their own vehicle, but they prefer having one.

Where people live plays a big part in this. Six in ten (60%) of people who live in a rural area say living without a car is impossible, while 46% of suburbanites and 37% of those that live in an urban area say the same.

However, this doesn't mean urban car owners are ready to give up their vehicle just yet. One in two (48%) say that they could give up their vehicle but would prefer not to.

The desire to drive a car goes beyond a need to do so. For most it's their favourite way from getting from A to B.

In 22 of 31 countries surveyed people say driving is the mode of transport they enjoy most.

In Colombia, Peru, India, Singapore and South Korea people are most likely to enjoy using public transport, while Indonesians are the only country to choose motorbikes. People in Britain, Ireland and Argentina feel a walk is the best way to get around.

Among younger people and those on low incomes there is more variation on what they see as their favourite mode of transport.

For people on a low income, they are as likely to choose their car (24%) as their favourite mode of transport as they are public transport (24%) and walking (23%).

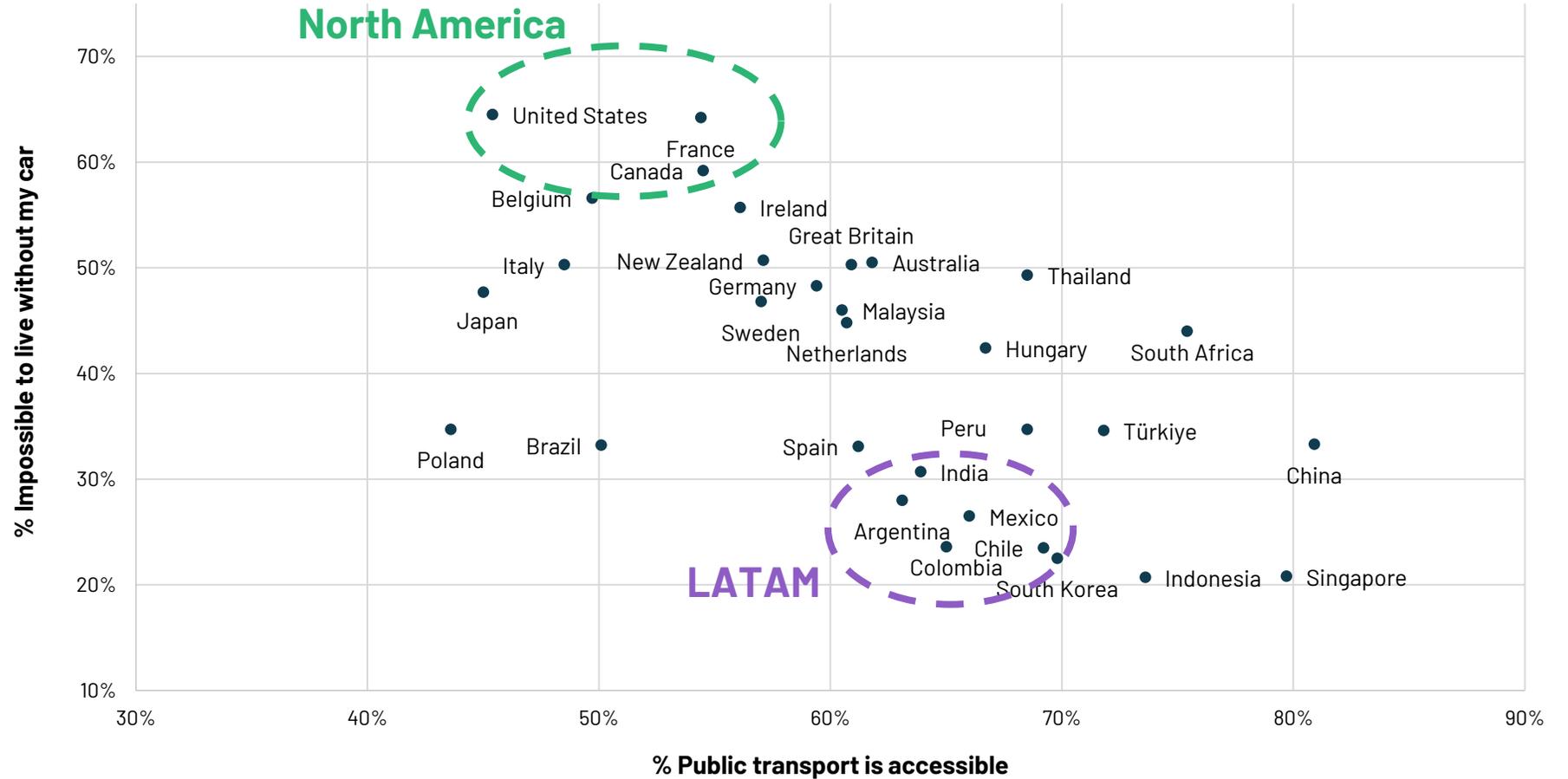
While Gen Z prefer their own car for getting around (26%), like other generations, they are much more likely to like public transport (22%) compared to other age groups (Baby Boomer 14%, Gen X 16%, and Millennial (15%).

# 43%

of car owners across 31 countries feel it would be impossible to live without their vehicle. Highest in the US (65%) and France (64%).

The countries who are most "car dependent" tend to score low on accessibility of public transport

% Impossible to live without my car vs % public transport is accessible



Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

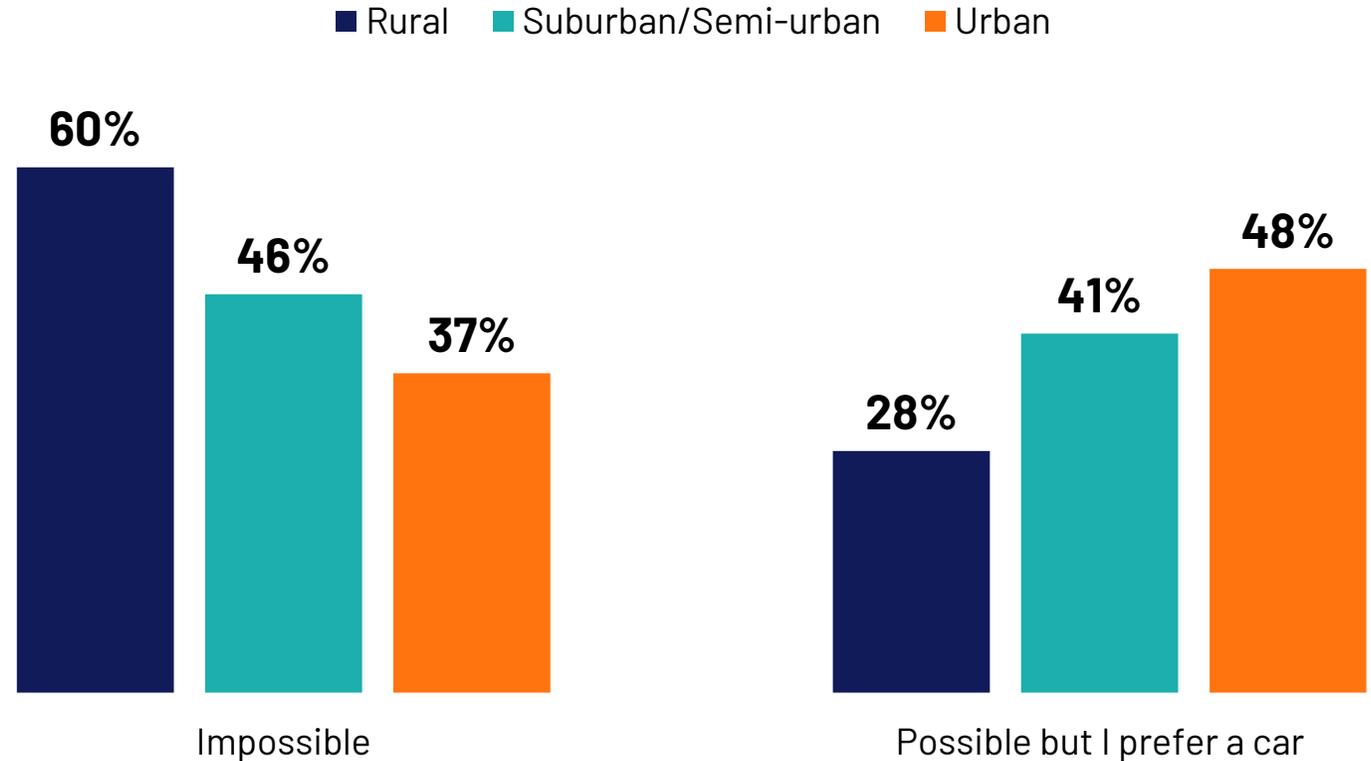
# Rural drivers more likely to feel their car is essential

Six in ten of those that live in a rural area say living without their car is impossible. This feeling is much lower among drivers who live in an urban area.

For urban drivers, one in two (48%) say they prefer driving their car but acknowledge they could live without it.

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

Q. Bearing in mind your daily mobility and transportation needs, do you believe a life where you would not own a car or pick up truck is... **Car and pick up truck drivers only**

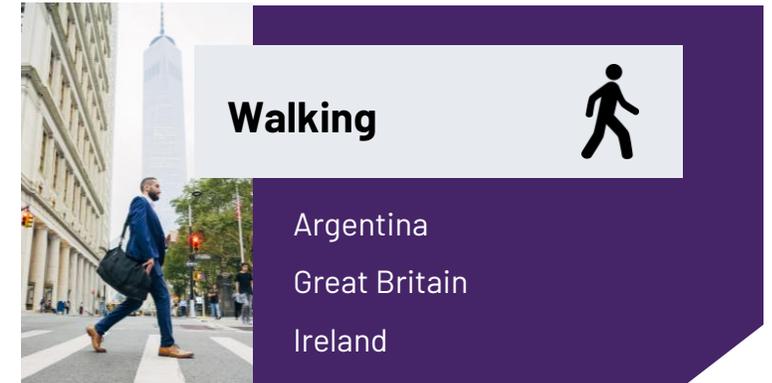
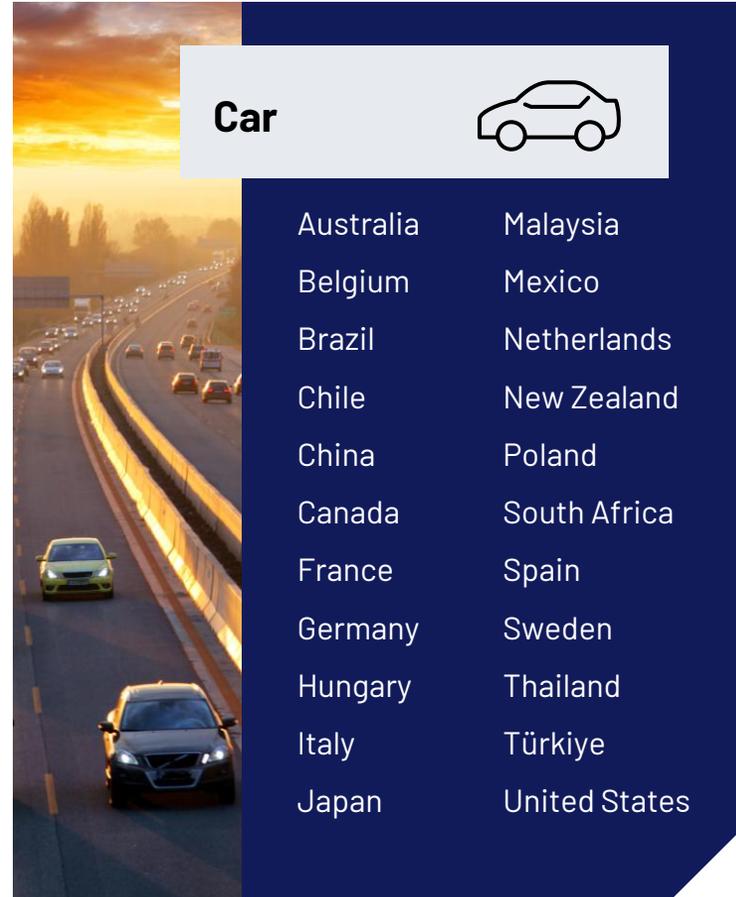


# Favourite mode of transport

In 22 of 31 countries surveyed cars are seen people's favourite form of transportation.

Q. Which mode of transport do you enjoy most?

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



# Public transport and cycling



# Access and affordability of public transport

While only one in four (25%) across 31 countries say they use public transport as their main mode of transport, there is broad satisfaction with the public transport systems across countries.

Across 31 countries 62% say public transport in my country is accessible. In all countries are people more likely to feel it is accessible than not. Sixty-two per cent also say public transport is safe to use.

On the question of affordability, 52% think this is the case for public transport in their country. However, in 13 countries a minority think public transport is affordable and in the Netherlands and Sweden more people think it is not affordable than do.

In attitudes towards public transport there is a divide based on where people live.

While there is a 14-percentage-point gap between rural (42%) and urban (58%) in feeling public transport is affordable, the gap is greater on accessibility. On average across 31 countries 68% of people who live in an urban area, and 60% in a suburban area, think public transport is accessible. Only 44% of those in a rural area feel the same.

Forty-six per cent across 31 countries say they would choose public transport over a personal car for environmental reasons. Only 25% disagree with this. However, there are big differences in

attitudes across countries on this question.

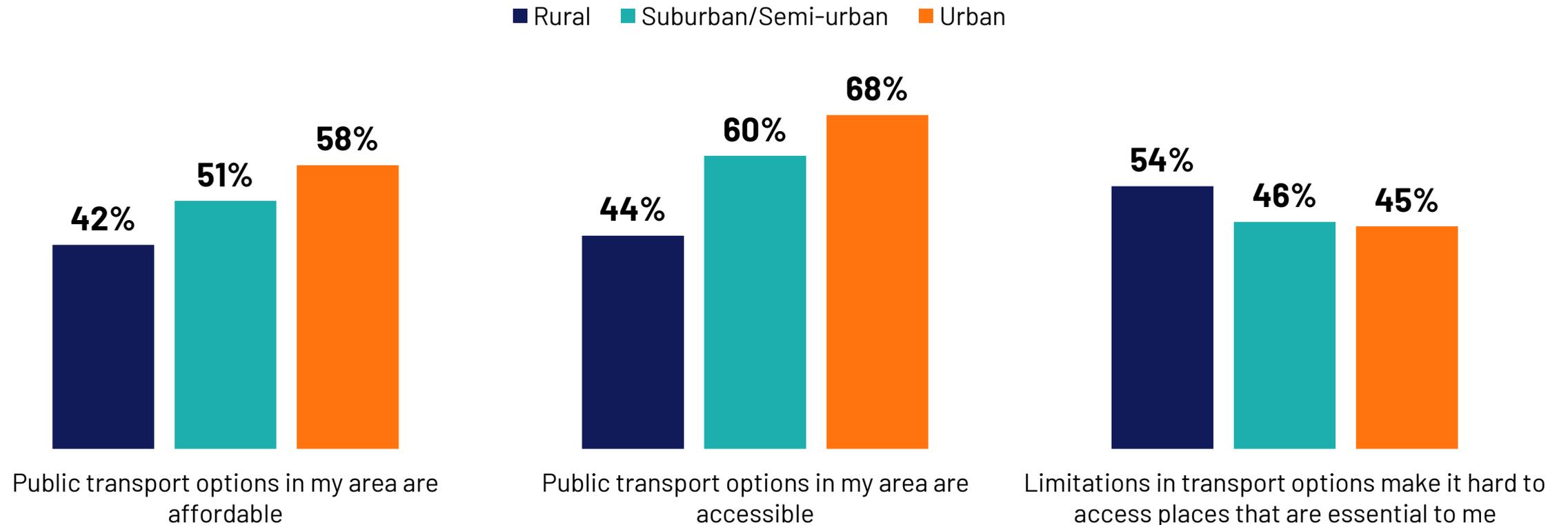
Thailand (64%) and India (62%) are the most likely to say they would use public transport for environmental reasons. In eight countries – Australia, New Zealand, France, Sweden, Netherlands, Belgium, Canada and the US – are people more likely to say they would not use public transport for environmental reasons than would.

While there are differences across countries there is less of a difference across age groups. Gen Z (48%) are the most likely to want to use public transport for environmental reasons, with 42% of Baby Boomers, the least likely, saying the same.

# 62%

across 31 countries say public transport is accessible in their country.

# Affordability and accessibility are issues for those in rural areas

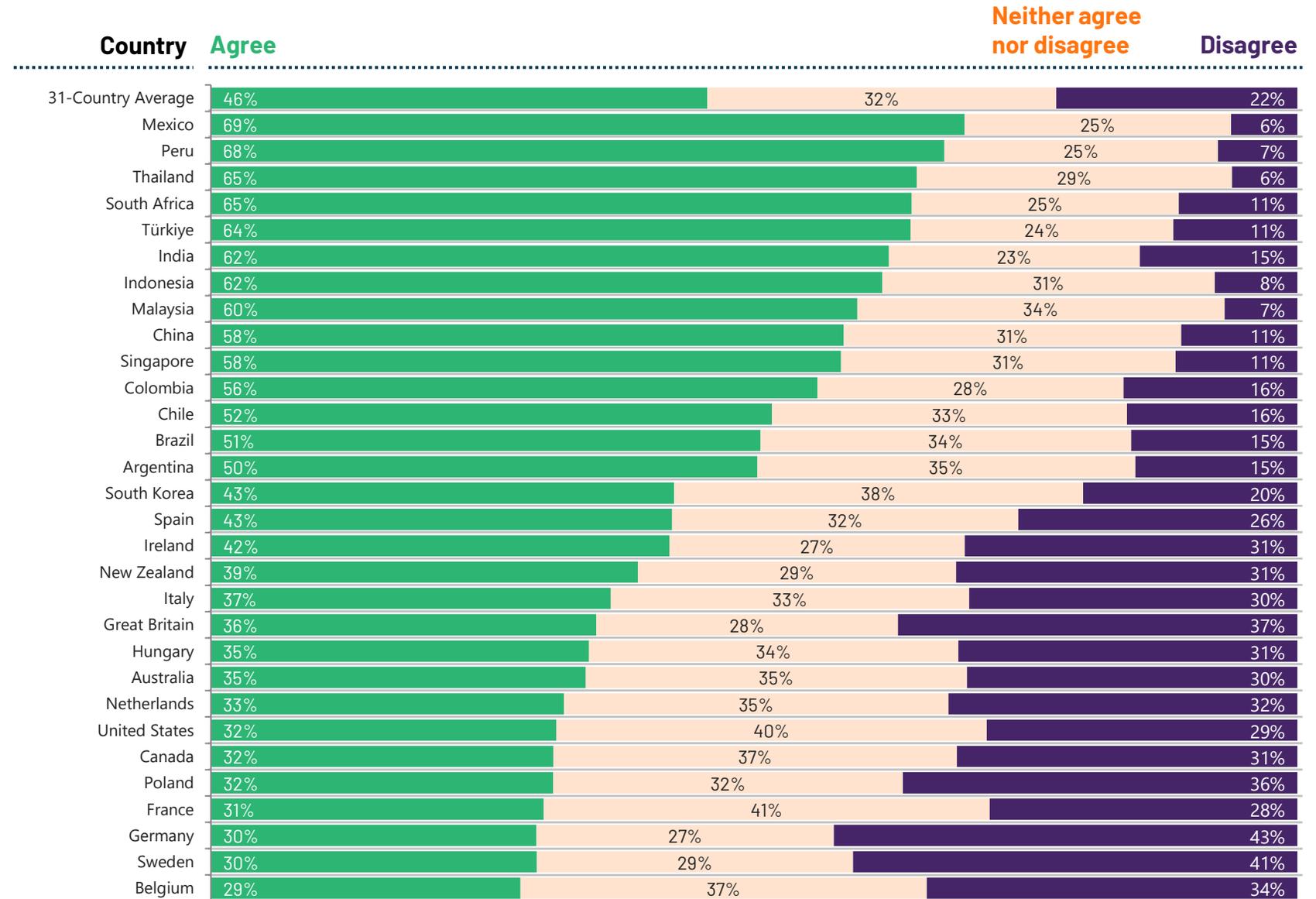


Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

How much do you agree with the following statements?

**I would support the introduction of congestion pricing to promote sustainable transportation habits**

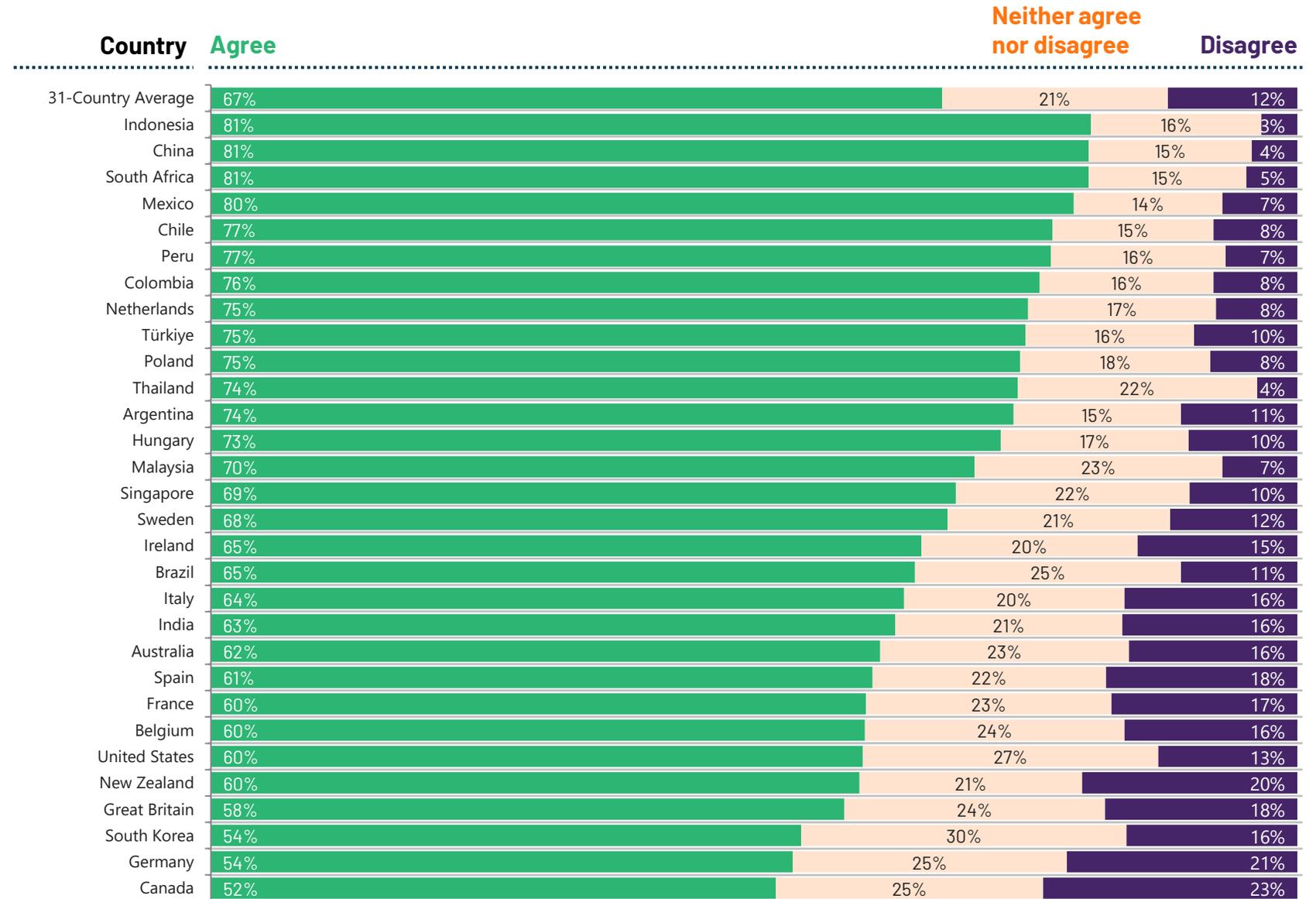
Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



How much do you agree with the following statements?

**I support the use of dedicated cycling lanes on roads**

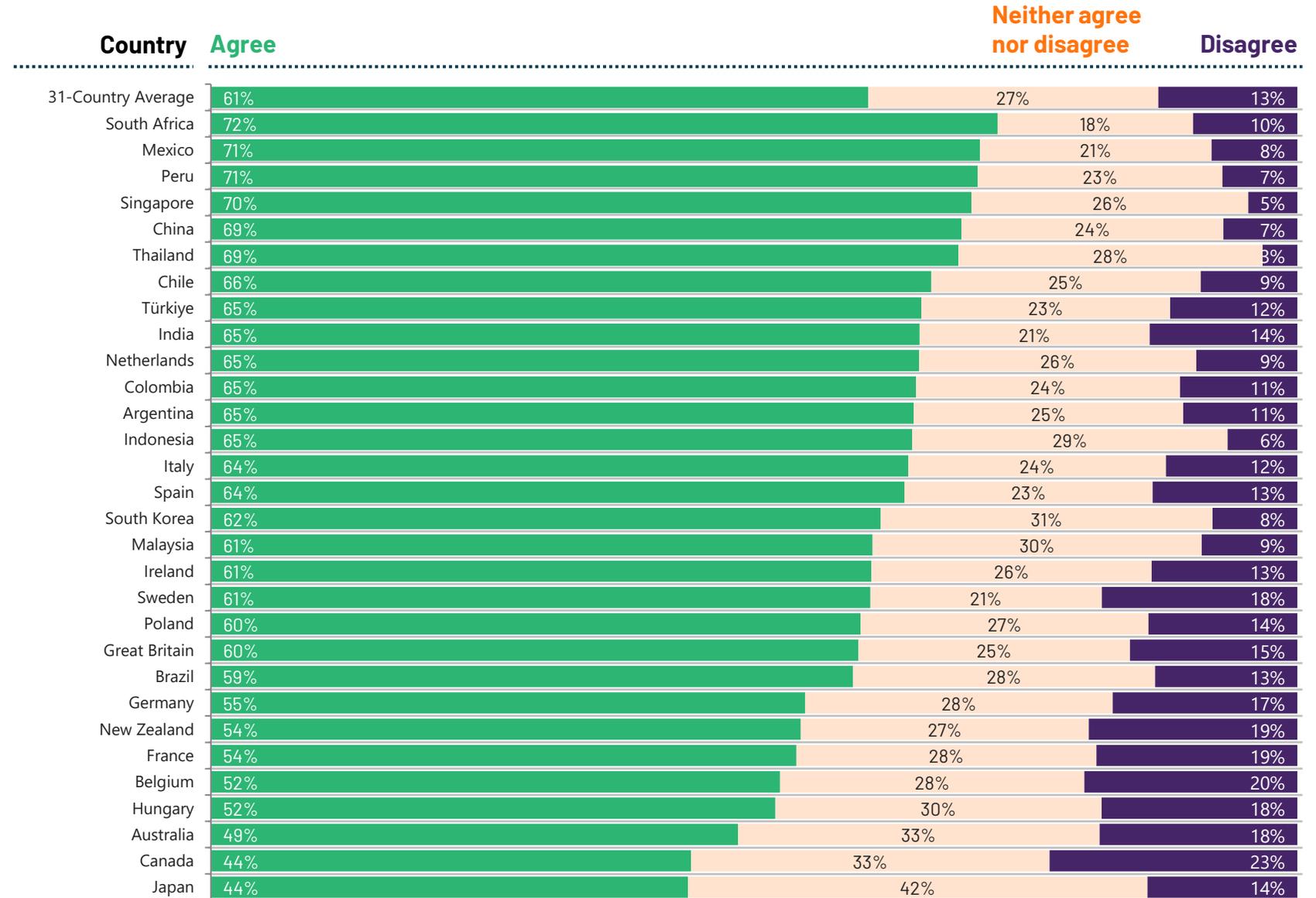
Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



How much do you agree with the following statements?

**I would prefer to use transport forms like walking and cycling to keep me active**

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



# Road safety



# Are my roads safe?

On average across 31 countries, 55% are they are concerned about road safety in their local area.

Worry is greater for those who live in an urban area (57%), compared to rural (51%) and suburban (52%) areas.

When we compare the level of concern for road safety against the level of road deaths there are some differences.

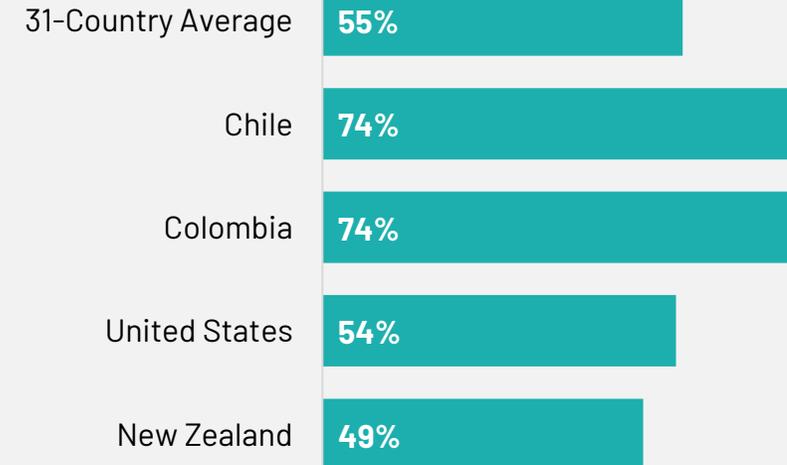
[Looking at OECD countries](#) where fatalities are highest, Chile and Colombia have a high level of worry about safety fitting with the greater risk in their country.

However, looking at the US and New Zealand concern is much lower than their risk.

Fifty-four per cent of Americans are concerned about road safety, the same as the global average in our survey, despite only Colombia and Costa Rica are higher rate in the OECD.

New Zealand has the fifth highest rate in the OECD but ranks in the bottom of half of our survey results.

## % concerned about road safety in my area



[Click here for the full country breakdown](#)

**Base:** 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



# How to improve road safety

There is strong support for stricter traffic laws and enhanced driver education programs to improve road safety (66% and 71% respectively).

When we ask about if they support lower speed limits to lower the likelihood of crashes and severity of injury, there are some differences in opinion.

Starting with residential areas, people are happy for there to be lower speed limits. Across 31 countries 70% on average support and in all but one country (Japan) do a majority back this.

On main roads support falls slightly (62%) and in all but six countries

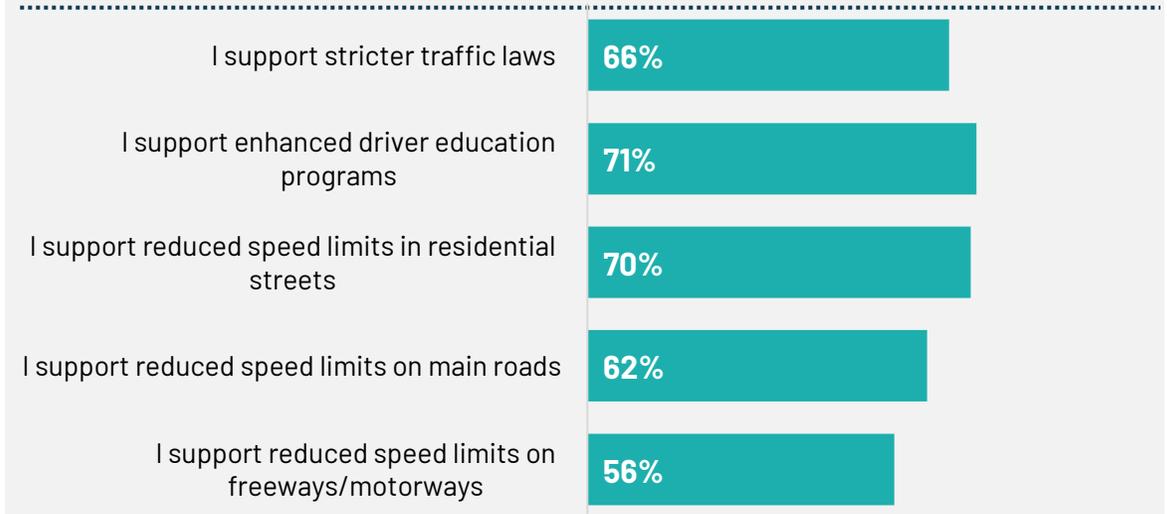
(Australia, Sweden, Belgium, Netherlands, France and Japan) do a majority support lower speed.

When it comes to freeways or motorways people are slightly more divided. Global support falls to 56% in favour of a lower speed limit and in 12 countries it only receives minority support.

There is also division between men and women. Across all generations women are more likely than men to support lower speed limits on freeways. The gap in support between men and women is largest among baby boomers, with 61% of women in favour and only 47% of men.

## Do you agree or disagree with the following statements?

% agree across 31 countries

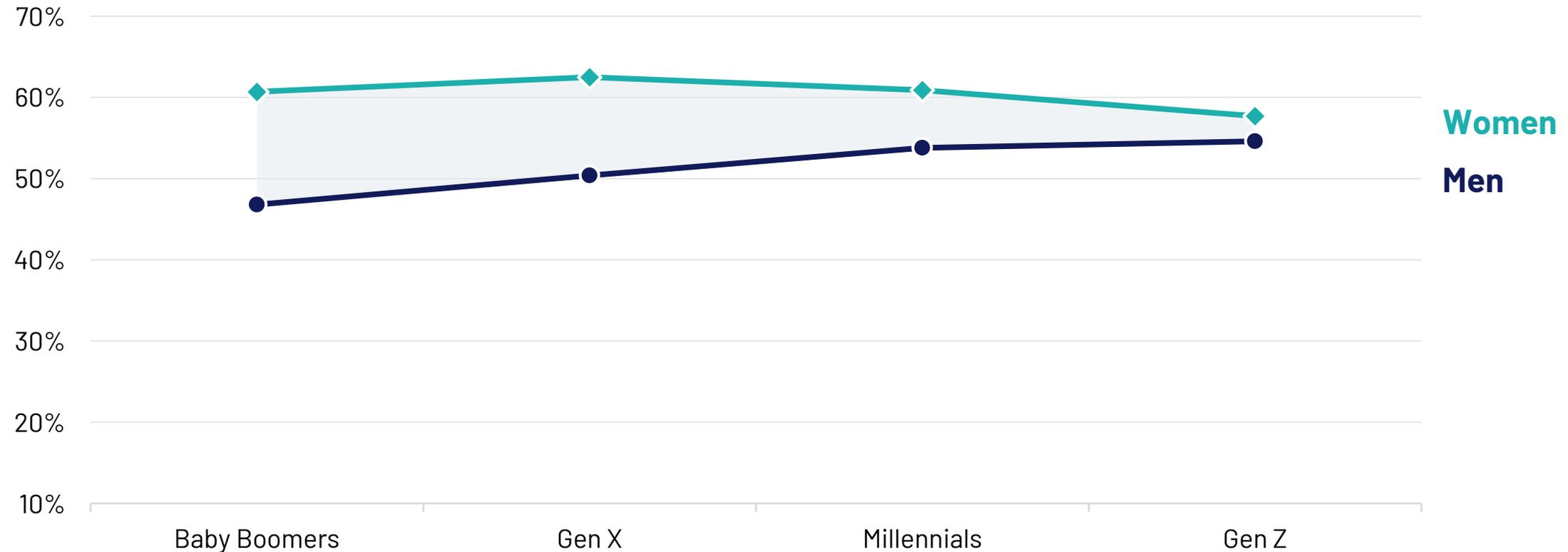


**Base:** 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



# Men across all generations are less likely to support lower speed limits on freeways

% I support reduced speed limits on freeways/motorways to lower the likelihood of crashes and severity of injury

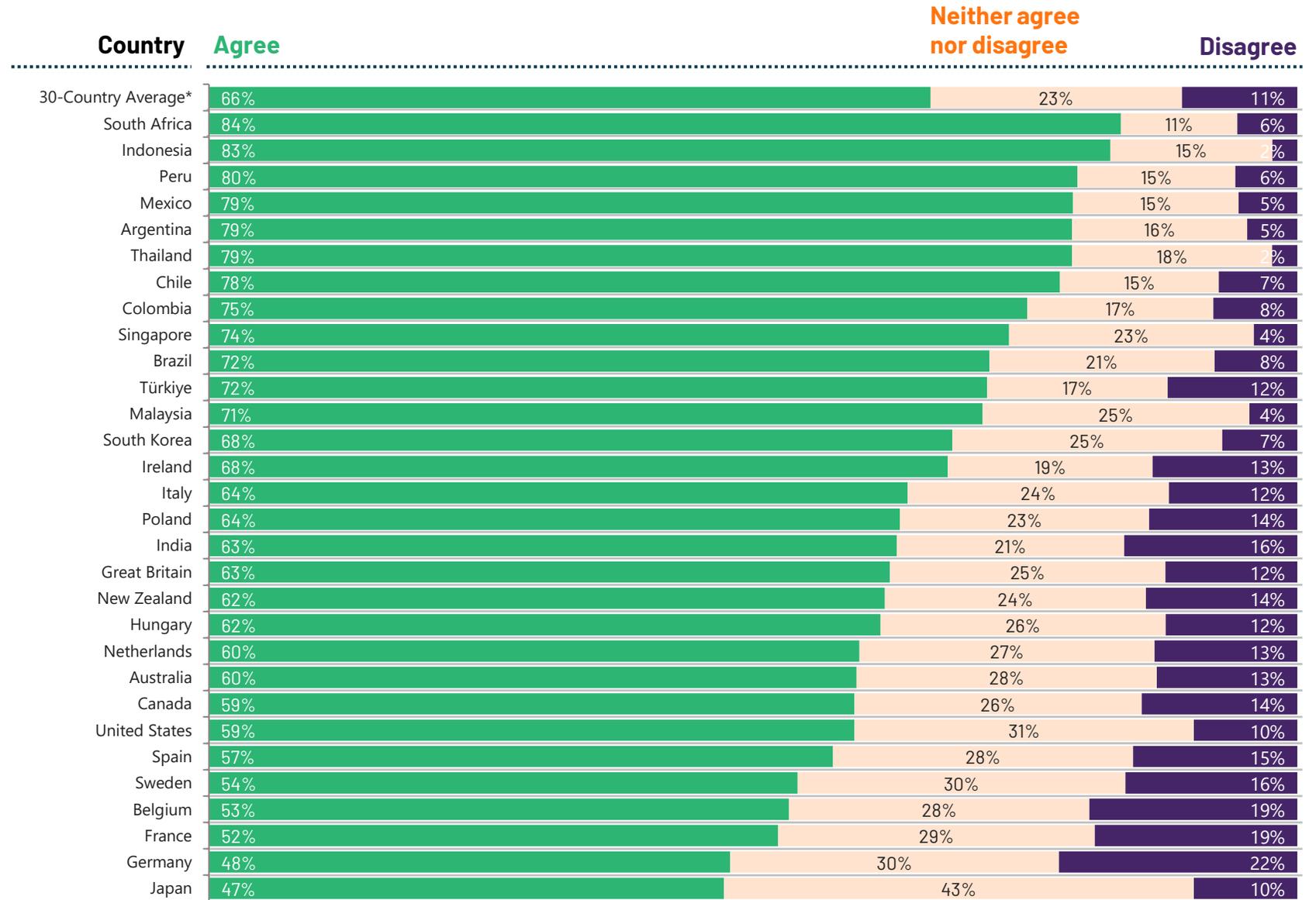


Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

How much do you agree with the following statements?

**I support stricter traffic laws to improve road safety**

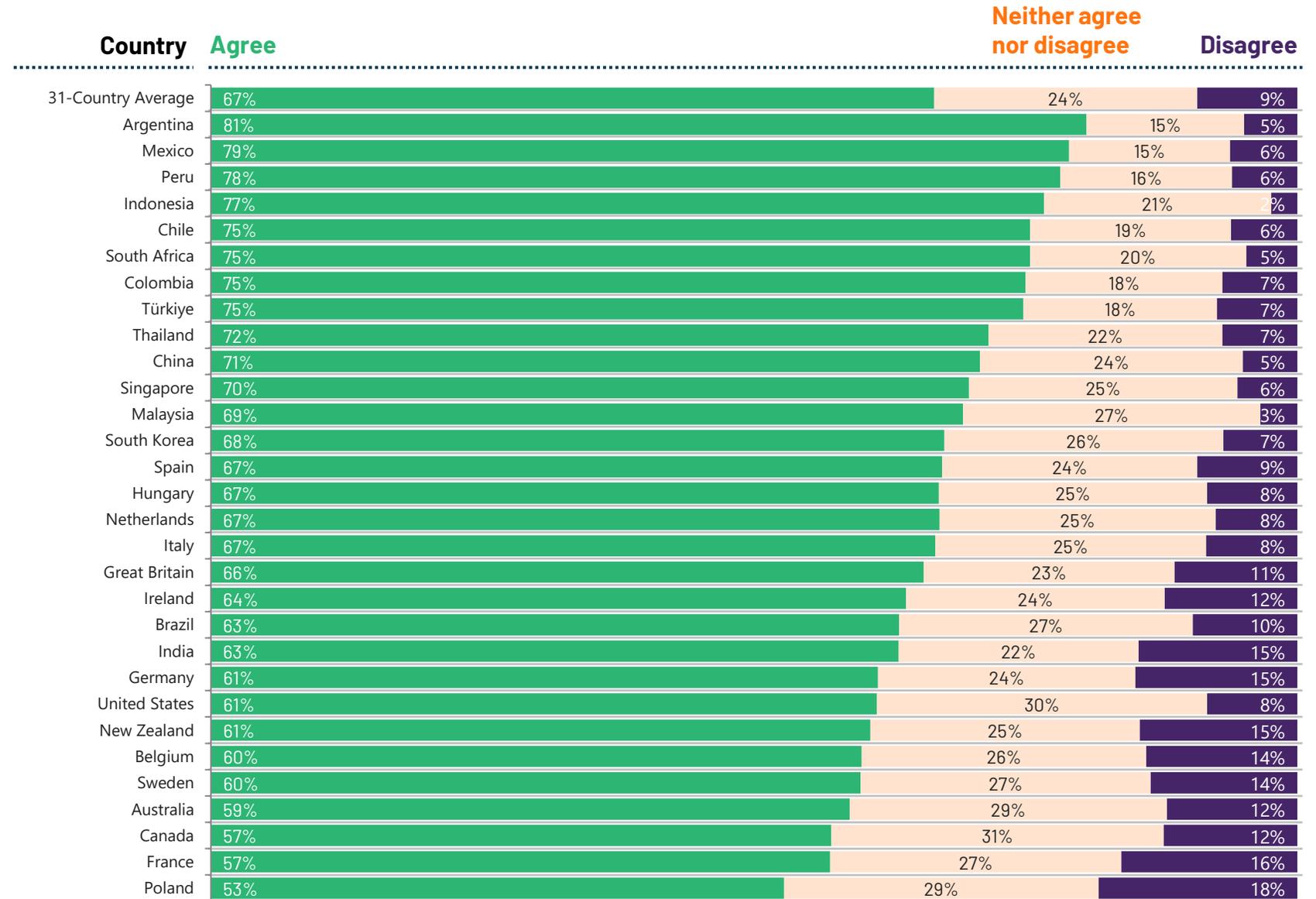
Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



How much do you agree with the following statements?

**I am in favor of giving priority to pedestrians over cars in local shopping precincts**

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.



# Electric vehicle reality check



# Acceptance and apathy to electric vehicles

Moving away from cars with an internal combustion engine is seen as integral to lowering greenhouse gas emissions and achieving net zero. However, despite the need to move away from these vehicles consumers have not warmed to having an electric car.

Across 31 countries, 47% say driving an electric vehicle “appeals to me”. This feeling is lower in many of the world’s most advanced economies. People in France, the US, Canada and Germany are the least convinced about the appeal of EVs. Countries in Asia and LATAM are more open to electric cars.

People in Europe and North America also tend to be less likely to say electric cars positively impact the environment compared to people in LATAM and Asia.

Opinions of electric vehicles are less positive outside urban centres, as well as among older people.

Four in ten (40%) of those that live in a rural area say an EV appeals to them compared to 52% of people living in an urban area. People in a rural area are also less likely to feel an EV is better for the environment (45% compared to 59% urban).

Baby boomer women are the least interested in EVs. Only 31% of them say an EV appeals to them compared to 39% of baby boomer men and 54% of people on average.

Despite the lack of desire to drive an EV there is acceptance that they will be a more common sight on our streets.

Fifty-three per cent think by 2030 many consumers will have electric cars, only 19% disagree.

As the country with the most electric cars in the world, China has greatest acceptance of the technology. In the country 67% say an electric vehicle is appealing to me and 73% say many consumers will adopt the cars in the next five years.

China is also the most likely to support policies to encourage people to purchase electric cars. While 37% across 31 countries think their government is not doing enough to develop electric cars, China is the country where people are the least likely to feel this way (11%).

# 40%

of people that live in a rural area say driving an electric vehicle is appealing to them.

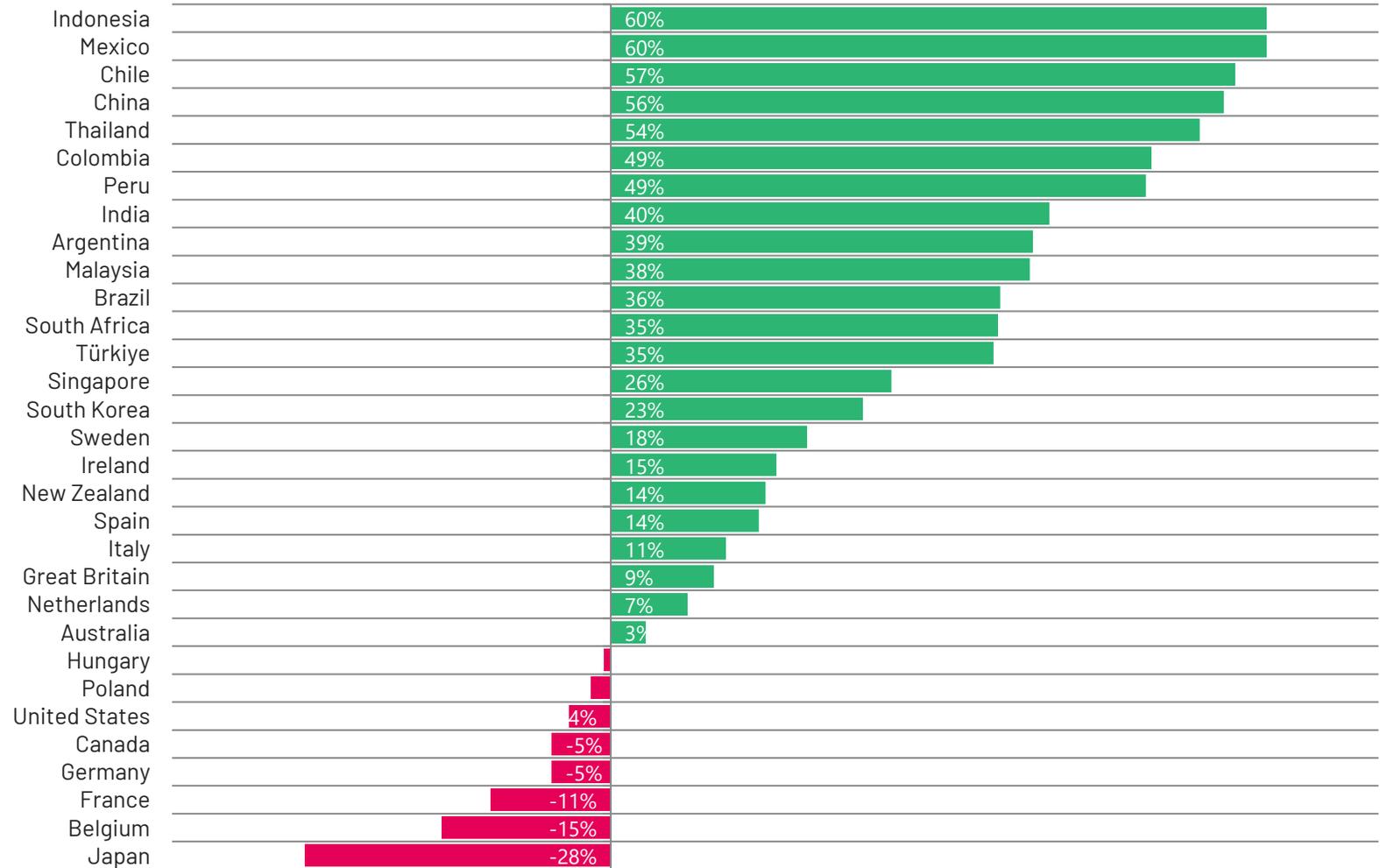
**In five of the G7 countries people are more likely to have less interest in driving an EV. Interest is highest in Asia and LATAM.**

How much do you agree with the following statements regarding battery electric cars or ... (BEVs)?

Driving an electric vehicle car / ... is appealing to me

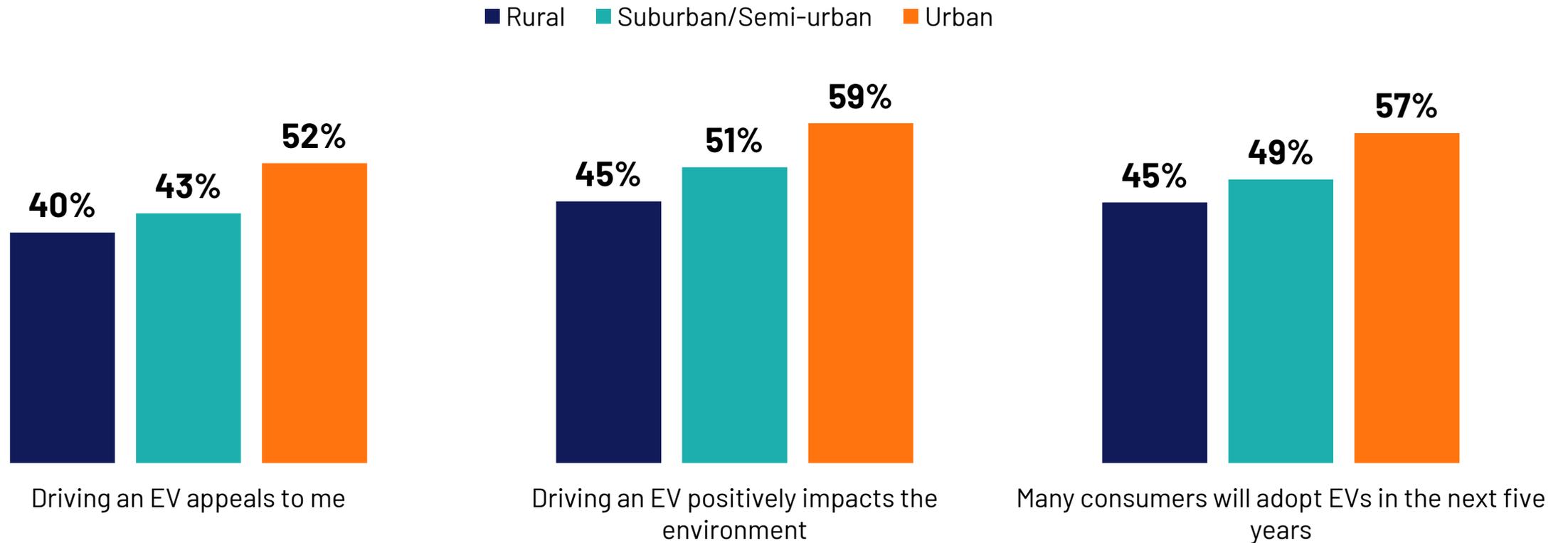
Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

## High interest in EVs



## Low interest in EVs

# People who live in an urban area hold more positive opinions on EVs



Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

# Mind the gap: Trust is lacking on new technology



# Lack of trust dampens enthusiasm for new technology

Across the surveys we run looking at global attitudes to technology we see a divide in much of the world. When it comes to new technology, we can see that many countries fit into the “excited” or “sceptical” buckets. In [our Ipsos AI Monitor](#) English-speaking countries and Europe are more likely to be nervous towards AI, while Asia is more likely to be excited about the benefits AI will bring.

With self-driving cars we see a similar divide. On a global level we see opinion is on average split about whether a self-driving car is a safe option. As many people across 31 countries say they would feel safe in a self-driving car as say they would not (36%). They are also split on whether they want to own one (38% agree vs 37% disagree).

In countries where Level 4 autonomous vehicles are being deployed or tested how you feel depends on where you live. In Asian countries, like China, South Korea and Singapore, people are more likely to be open to being in a self-driving car, while in Europe and North America – USA, Canada, France, Great Britain and Belgium – people feel less safe. Those in Japan are split on the issue.

There are concerns around protecting individuals’ personal data. Automakers need to do more to build trust in this area in some parts of the world. Compared to a majority in LATAM (51%) and Asia Pacific (50%), only 31% in North America and 34% in Europe trust automakers to protect their data as cars become smarter. There is slightly

greater trust in North America (36%) and Europe (42%) in government to have laws that protect people’s data, however it still does lack behind Asia (51%).

What this has led to is lack of enthusiasm for new technology in cars. While 55% across 31 countries say they look forward to new in-car technologies, in much of Europe people are more likely to disagree with this statement than agree.

China is the most likely to look forward to new in-vehicle technologies (78%) and is the only country where people would prefer to buy a new car from a tech company than an established automaker.

# 36%

As many people say they would feel safe in a self-driving car as say they would not (both 36%).

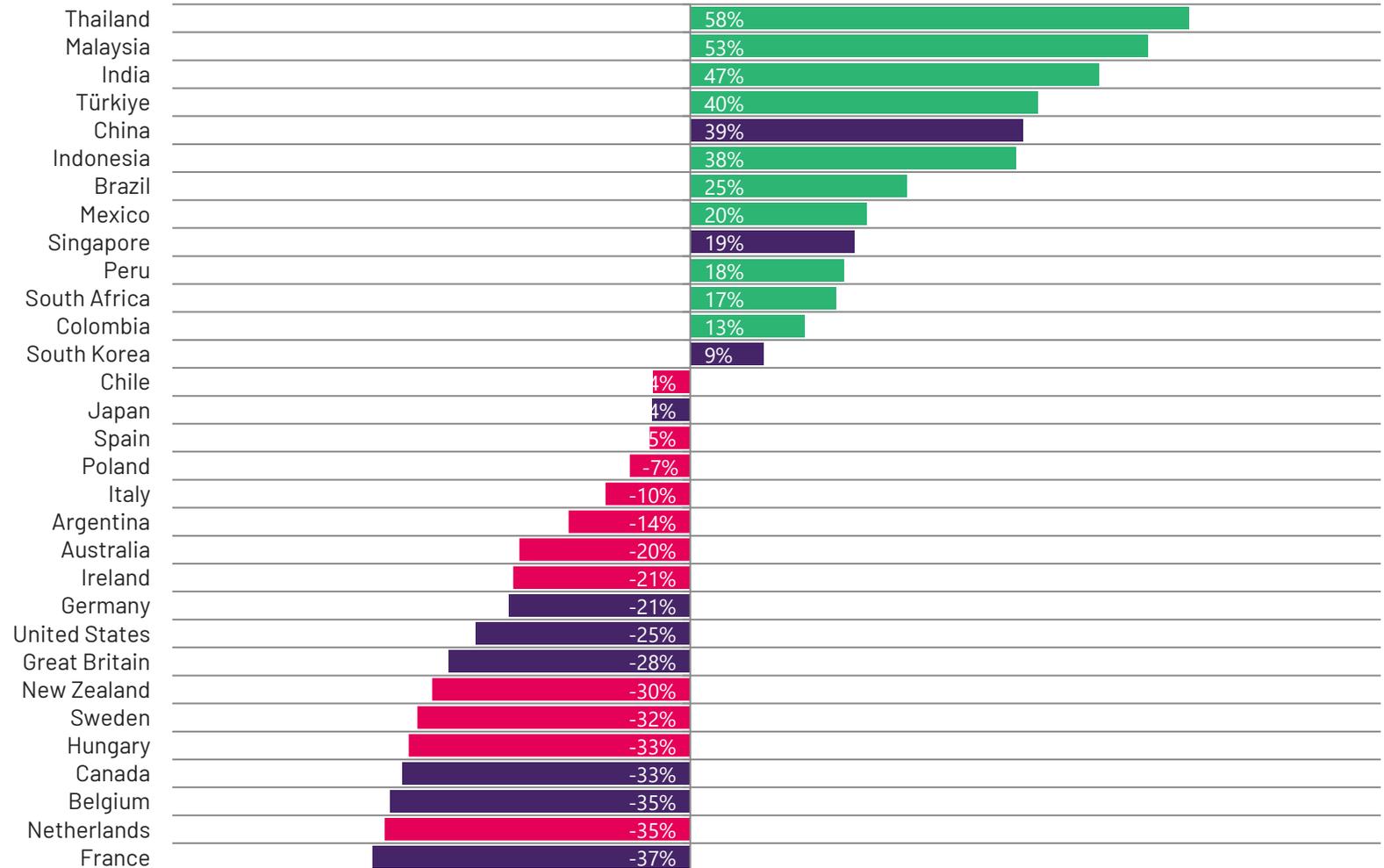
**Europeans and North Americans, even in countries which allow the technology, are less likely to feel safe in self-driving cars.**

How much do you agree with the following statements regarding in-vehicle and connected cars technology?

I would feel safe riding in a self-driving car / ...

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

## I feel safe in a self-driving car

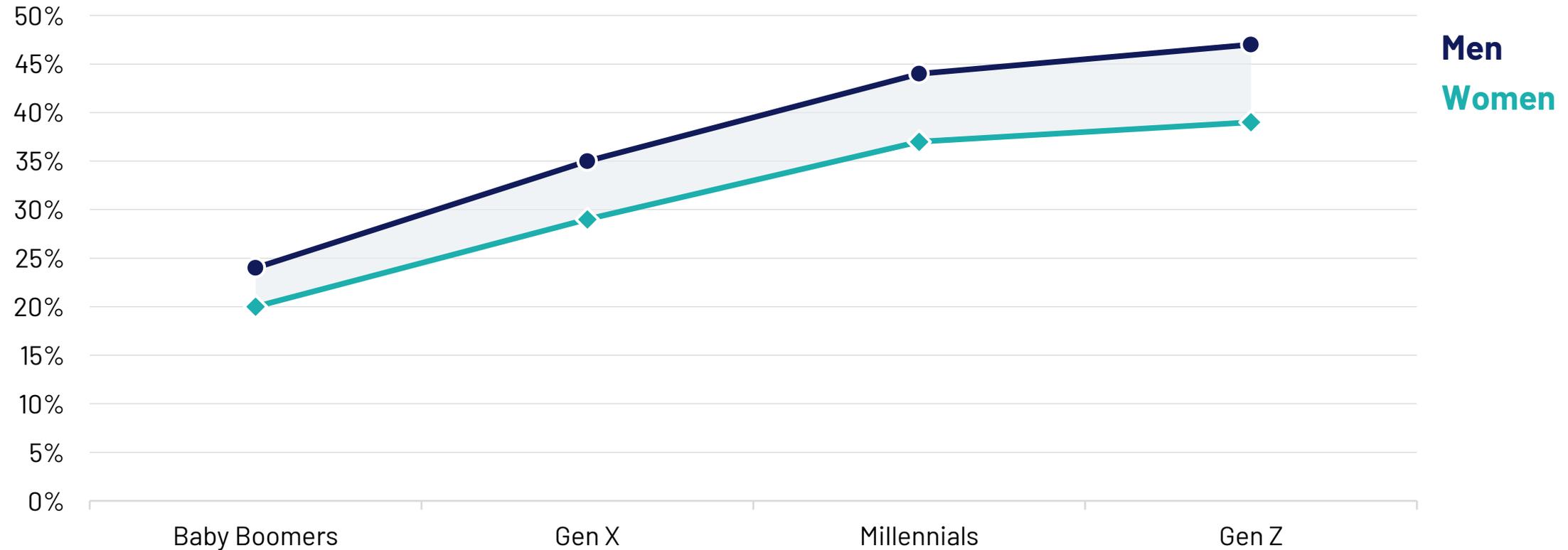


## I don't feel safe in a self-driving car

Countries testing or allow Level 4 autonomous vehicles in purple

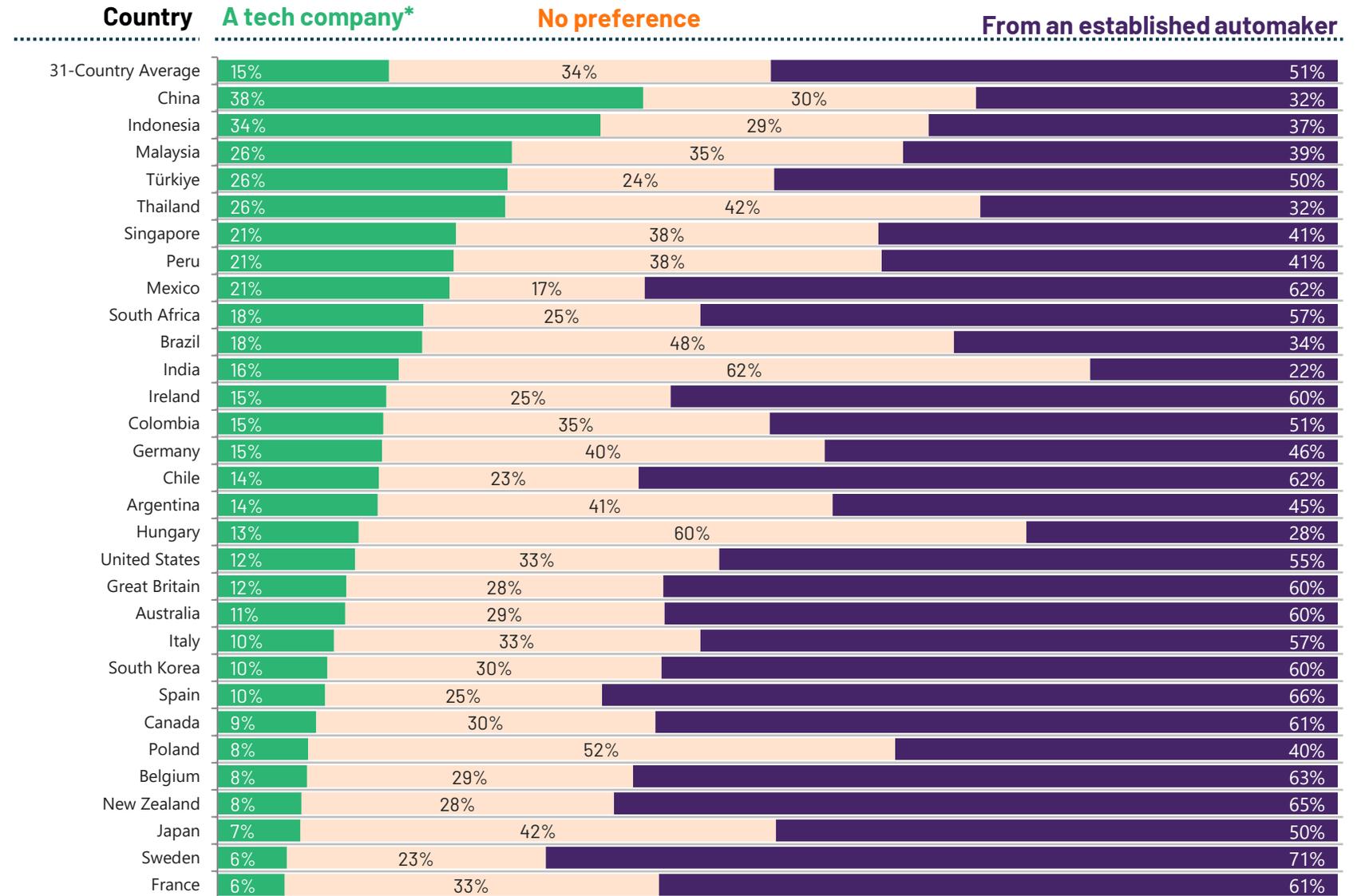
# The safety of self-driving cars is an issue for older people

% I would feel safe riding in a self-driving car / ...



Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

Would you prefer to buy a new car / ... from



\*A technology company like Google, Huawei, Xiaomi, Apple, Amazon, Sony...

Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

# Country of origin boycotts



# Car industry is not immune to global politics

Almost one in two globally (48%) say they would avoid certain cars due to where the brand is from. Japan is the most likely to say this (67%), while 63% in China say the same.

We followed up with the respondents that would avoid some nationality to ask which countries they would most likely steer away from.

Of those in Japan who would avoid certain nationalities, 90% say they would not buy Chinese cars.

While in China, Japanese cars were the most likely to be avoided (44%).

It's not just in Asia in which neighbourly disputes lead to consumer evasion.

In Canada public opinion has turned

against the US in the last 12 months.

There have been consumer boycotts of American products and only 24% of Canadians think the US will have a positive impact on the world (down 28pp in the last year).

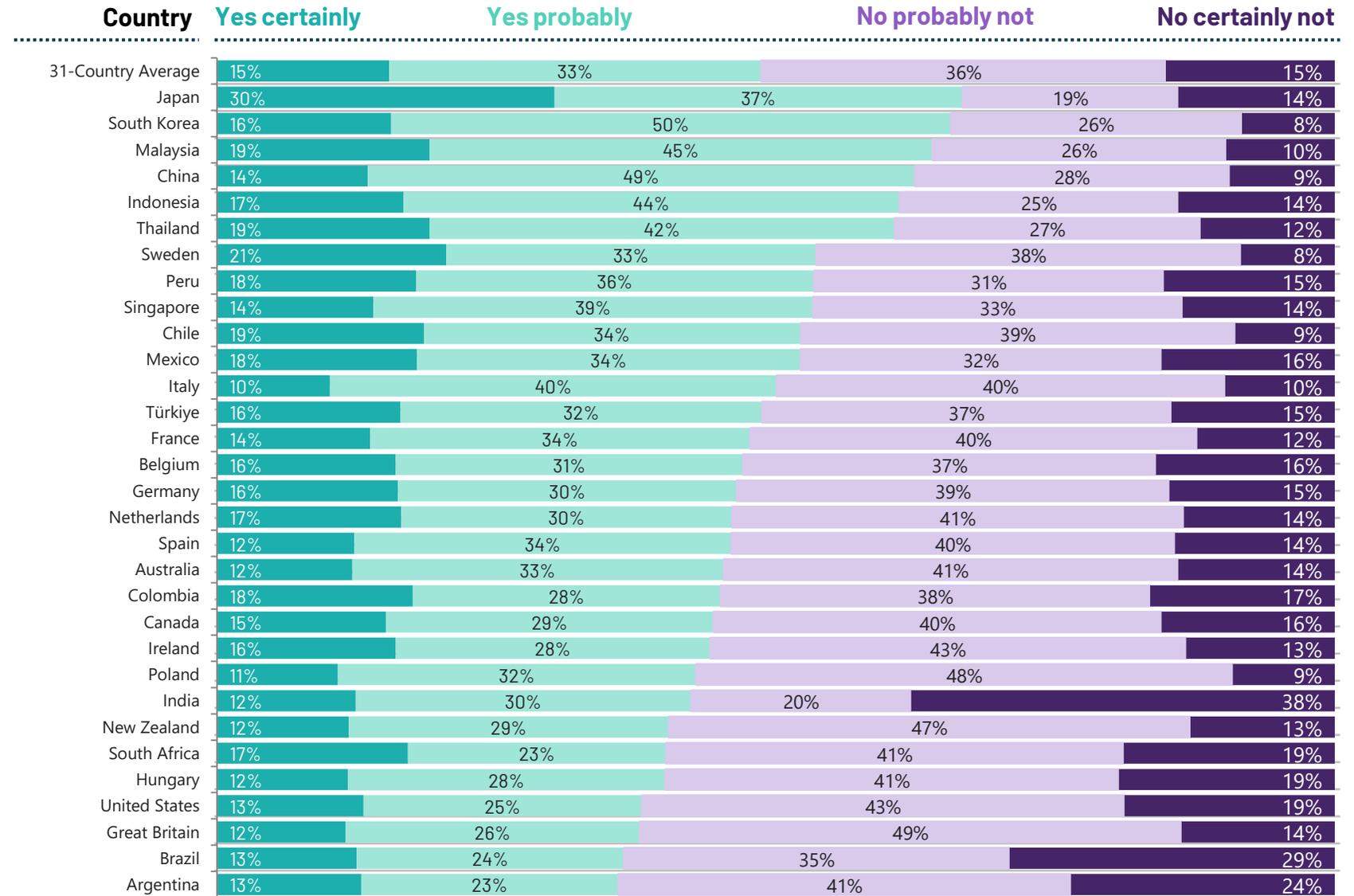
In 2024 Canada was [the largest export market for US cars and light trucks](#). At the end of 2025, Canadians were the most likely to say they would avoid American vehicles (48%).

On average across 31 countries Chinese (41%), Indian (38%) and American (24%) vehicles were the most likely to be avoided.

# 48%

say they would avoid some automakers because of their nationality.

Would you avoid purchasing a car / ... made by an automaker from a specific country, no matter where the vehicle is built?



Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

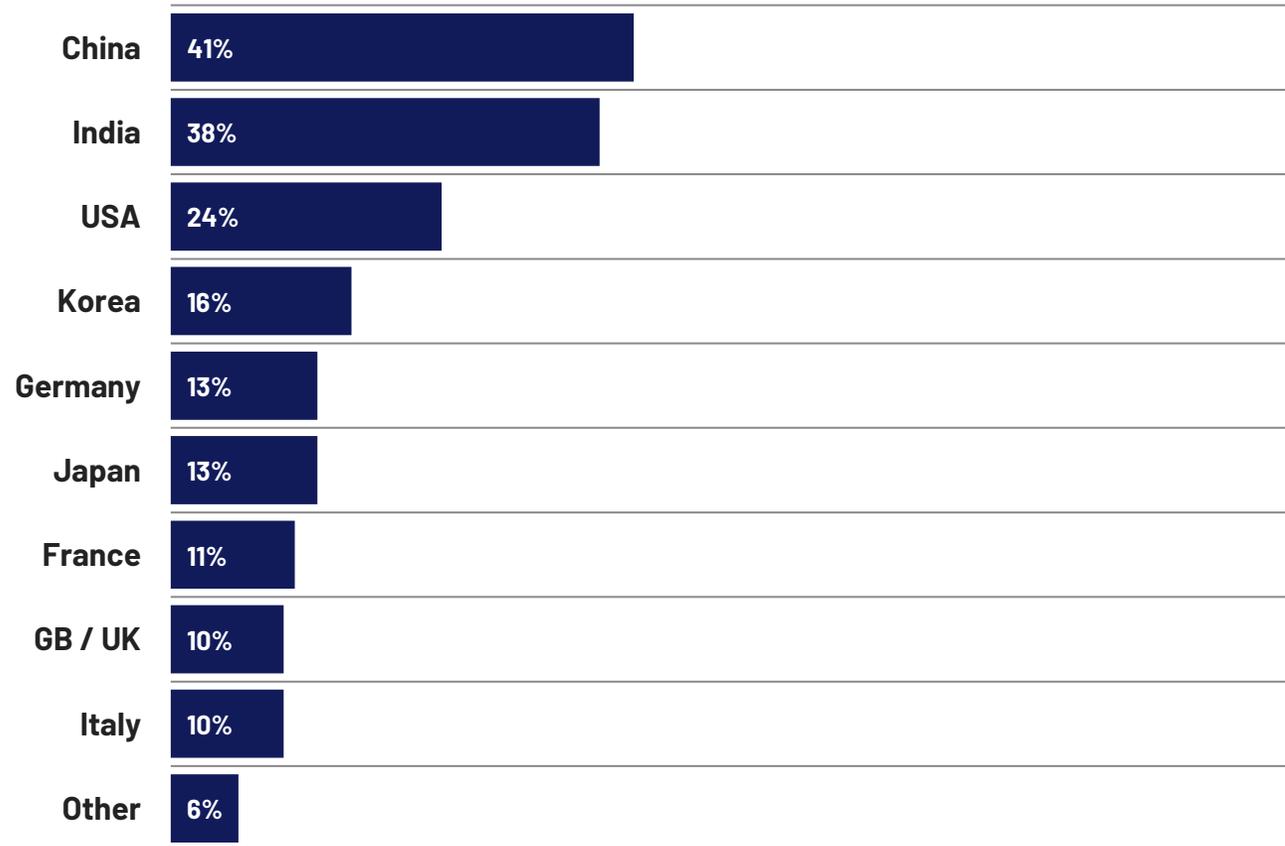
# China and India the countries most likely to be avoided

Forty-one per cent of people who say they would avoid a manufacturer because of its nationality would avoid Chinese automakers, with 38% saying they would not consider Indian brands.

Around one in four (24%) say they would steer clear of automakers from the USA.

Base: Base: 23,722 online adults under the age of 75 between 21 November and 5 December 2025 in 31 countries.

Q. From which country's automaker would you avoid purchasing a car / pick up truck? \*  
31-country average



\*Asked only to those who said they would avoid an automaker because of its nationality

# Methodology



# Methodology

These are the results of a 31-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, November 21 and Friday, December 5, 2025. For this survey, Ipsos interviewed a total of 23,722 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand, and Türkiye. The

sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, mainland China, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Türkiye are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

India's sample represents a large subset of its urban population – social economic classes A, B and C in metros and tier 1-3 town classes across all four zones.

The data is weighted so that the composition of each country's sample best reflects the demographic profile of the adult population according to the most recent census data. "The Global Country Average" reflects the average result for all the countries and markets in which the survey was conducted. It has **not** been adjusted to the population size of each country or market and is **not** intended to suggest a total result.

When percentages do not sum up to 100 or the 'difference' appears to be +/-1 percentage point more/less than the actual result, this may be

due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll where N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

# For more information

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