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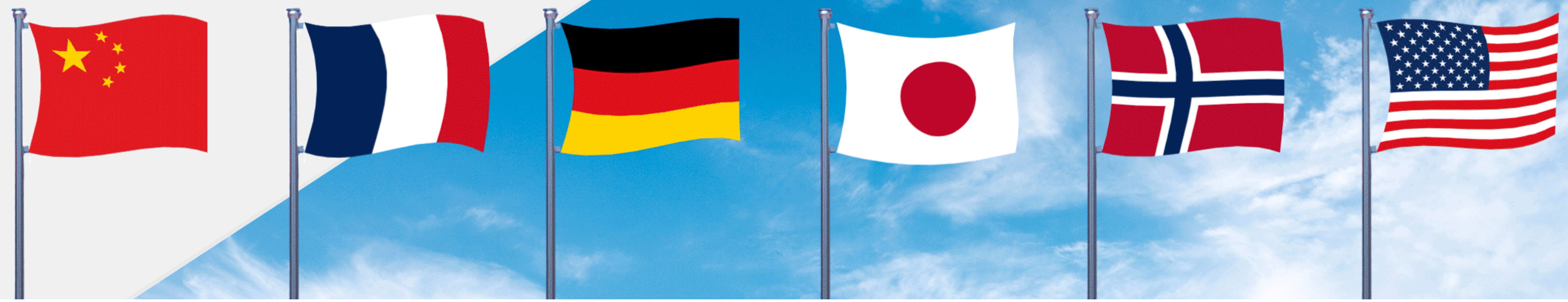
# Mobility Study 2022

# THE CONTINENTAL MOBILITY STUDY 2022

For the Continental Mobility Study 2022, infas asked, on behalf of Continental, more than 6,000 people from six nations in a representative survey about their mobility behavior, their awareness of sustainability in mobility, their attitude toward in-car technology and their travel behavior.



Online interviews in Germany (1,001), France (1,000), the USA (1,000), China (1,009), Japan (1,000) and Norway (1,001) in May 2022.

The samples are representative of the respective population; for China, the sample is representative of the urban population.

# EXECUTIVE SUMMARY (I)

## The role of cars in today's mobility

- The car remains a pillar of mobility – both in everyday life and on vacation.
- Respondents report to feel safer from COVID-19 infections in their car – be it in their everyday life or on vacation.

## Car ownership

- Most households have at least one car. Especially in France and the USA, households without a car are rare.
- Those cars are largely powered by combustion engines with little or no increase in electric or hybrid cars since 2020.
- Norway outshines the other countries with a 13 percent share of all-electric cars. Nonetheless, electric cars are still outnumbered by combustion engines.

## Affordability of personal mobility

- Against the backdrop of rising energy prices, many people are concerned that they will no longer be able to afford personal mobility.
- Concerns about affordability are not only expressed for personal mobility in general. Affordability is also a common thread running through various topics. Concerns include possible price increases due to technological developments.

## Attitudes toward electric cars

- Owners of non-electric cars remain skeptical of buying one. Main concerns are the range and the lack of charging infrastructure as well as uncertainty about the running costs – especially considering the currently rising energy prices (in May 2022).
- Finally, respondents are unsure of how environmentally friendly electric mobility actually is.

# EXECUTIVE SUMMARY (II)

## Sustainable mobility

- Sustainability is important to many. At the same time, they are concerned that they will no longer be able to afford personal mobility against the backdrop of rising energy prices.
- Respondents mainly rely on their governments to make mobility more sustainable and ensure that driving remains affordable.
- At the same time, half of the respondents are willing to pay more for environmentally friendly cars.
- Willingness to pay more is higher among younger participants. They are also more willing to pay extra for sustainable options such as recycled tires and fuel from renewable sources.

## In-car technology

- Interest in the latest technology in cars is high. However, many also fear that new technology will lead to rising prices.
- Respondents in China as well as young respondents in all countries are most interested in automated driving and assistance features.
- There is little development in the attitudes toward automated driving since 2020.
- Even though many respondents still lack direct contact with functions such as automatic parking and automatic driving in traffic jams, there is interest in such options. A driver assistance system for left/right turns is viewed most positively.

## Connectivity and user experience

- Connectivity features such as a data recorder or the general possibility of downloading software functions are particularly relevant for people in Asia.
- There is general agreement that new features in a car must be easy to use. Hence, most respondents voice preferences for big car displays with rather simple functions.

# THE IMPORTANCE

# OF PERSONAL MOBILITY

# INCREASING DESIRE FOR PERSONAL MOBILITY

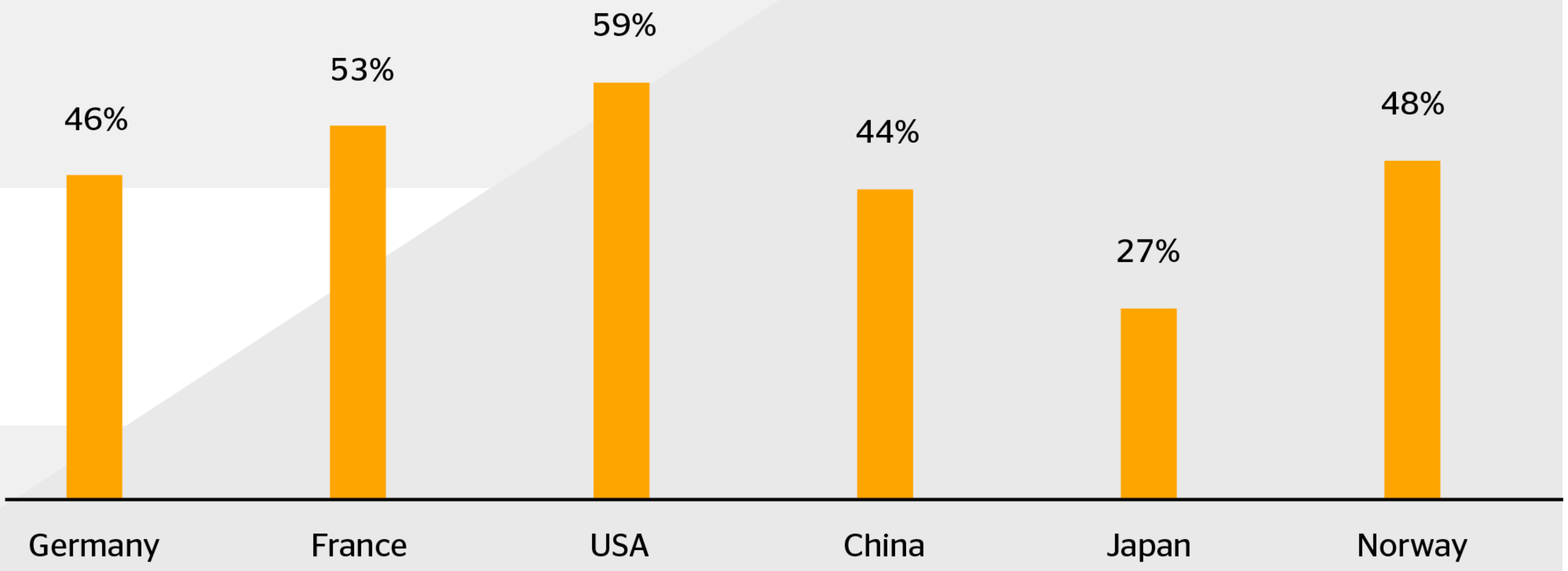
In both urban and rural areas, cars remain the central pillar of mobility.

Individual transport has become significantly more important in the pandemic.

# THE ROLE OF CARS

In Europe and the USA, one in two people drives a car every day. For daily mobility, the car is used more often than all other modes of transport combined.

Daily car use

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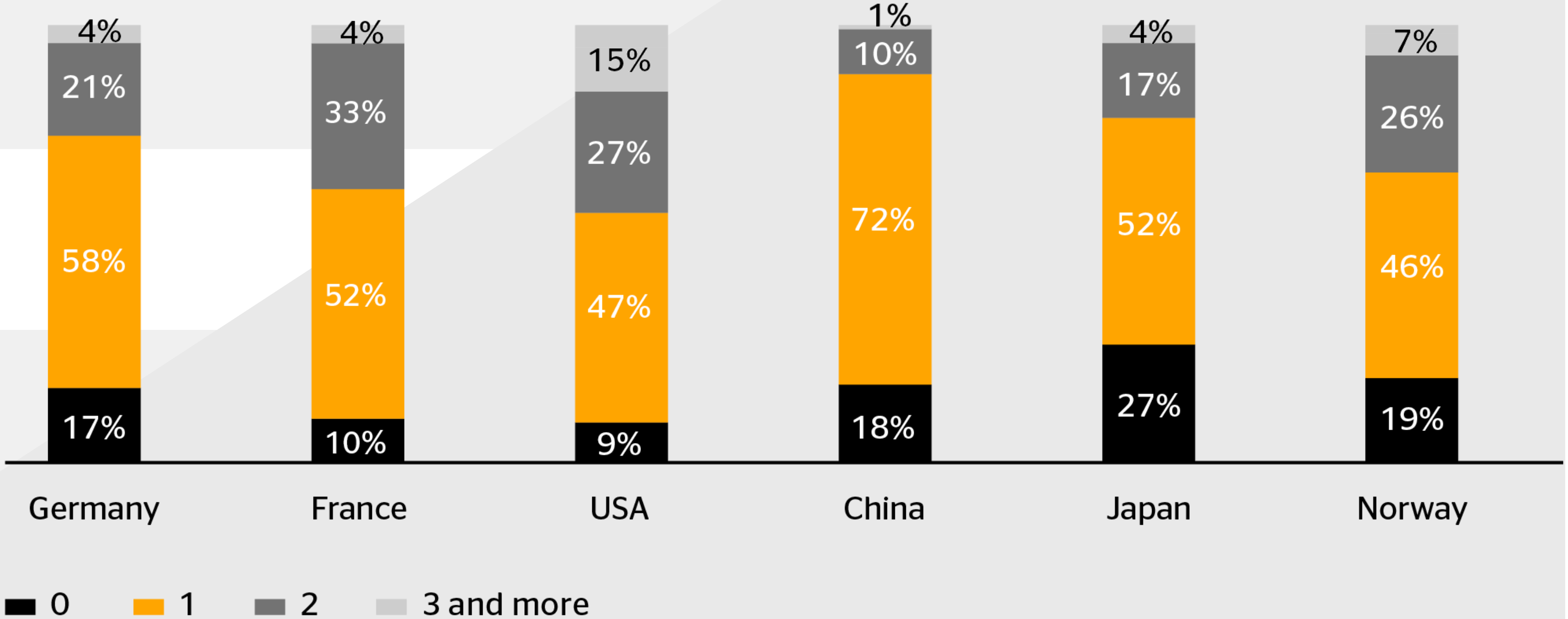
# CAR OWNWERSHIP

Owning your own car is today's standard - but is it also the future of mobility?
The vast majority of households in all countries own at least one car.

Cars per household




Difference to 100%: "prefer not to answer"

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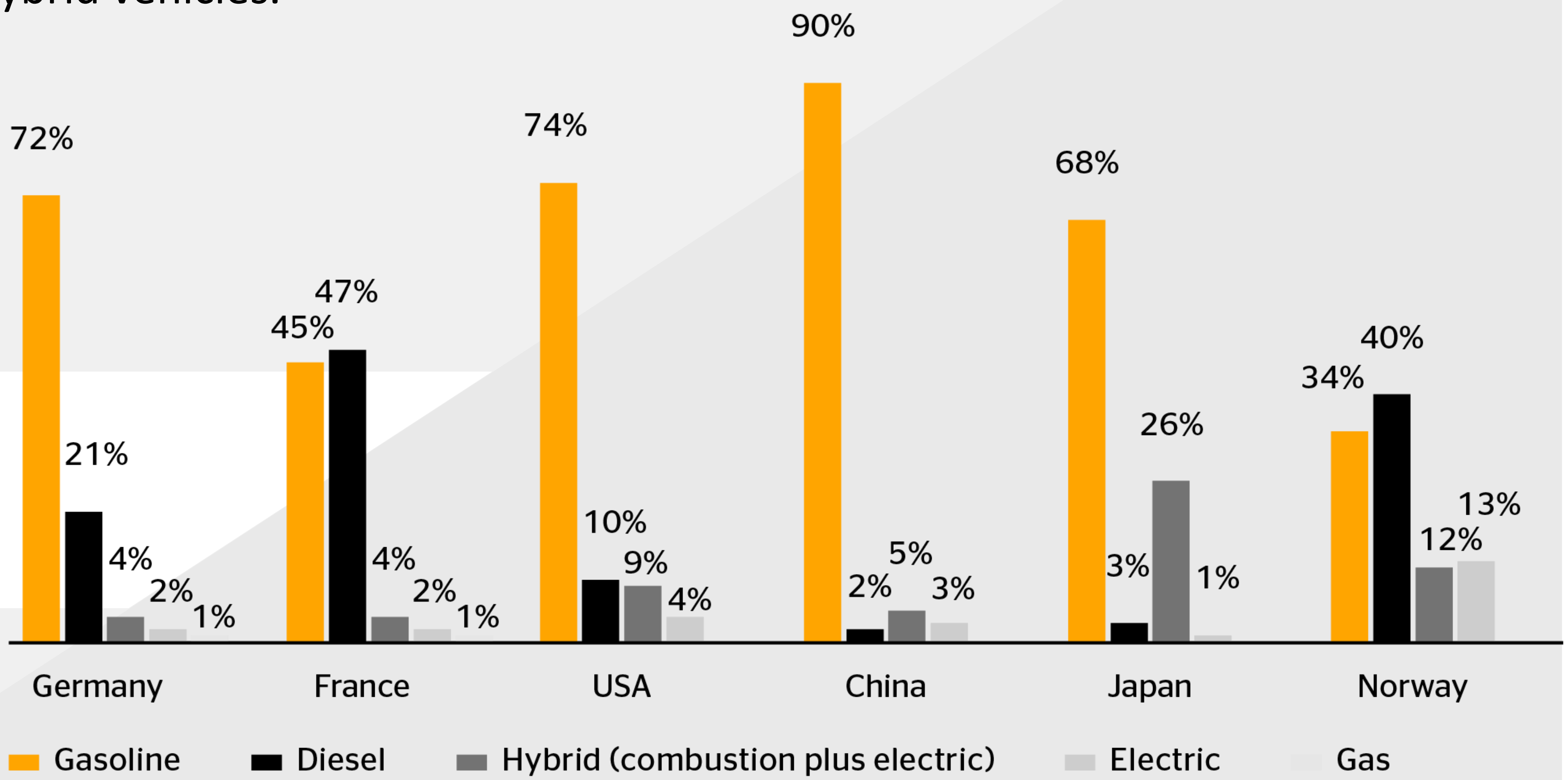
# NO SIGNIFICANT INCREASE IN ALL-ELECTRIC CARS

The type of drive remains at a comparable level over the years. In Japan, there is an increase in hybrid vehicles.

What type of drive does the car you normally use have?




0 to 3% per country "can't say," question asked only to car owners. The distribution of the drive types is based on the data of the respective representative sample. It is not an inventory of all countries and may therefore show deviations from the overall distribution observed in real terms.

* As "gasoline" was translated as "petrol" while "gas" was displayed as "gas" for the US market, an unrealistic number of 466 US respondents selected "gas." These answers were excluded from the analysis.

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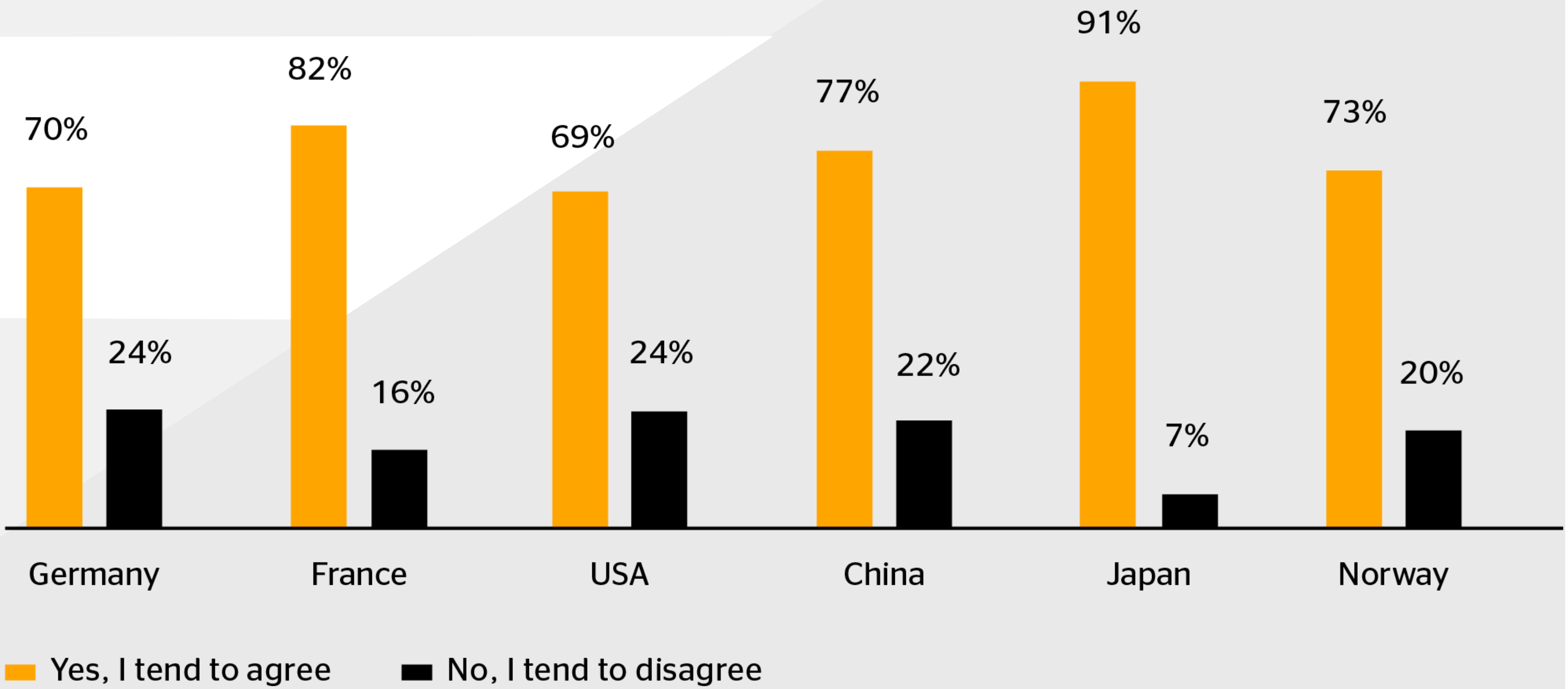
# IMPORTANCE OF PERSONAL MOBILITY

Personal mobility has become much more important during the COVID-19 pandemic.

Most people prefer to travel alone or with people they know.

"I prefer mobility options that allow me to travel alone (or with people I know)."




Difference to 100%: "prefer not to answer"

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# DOES PERSONAL MOBILITY DEPEND ON CAR OWNERSHIP?

70%

and more of the respondents say they have no contact with car-sharing models.
Cabs and other ride-sharing and shuttle solutions do also not play any role for 61 to 80 percent. Only in China, these are regularly used.

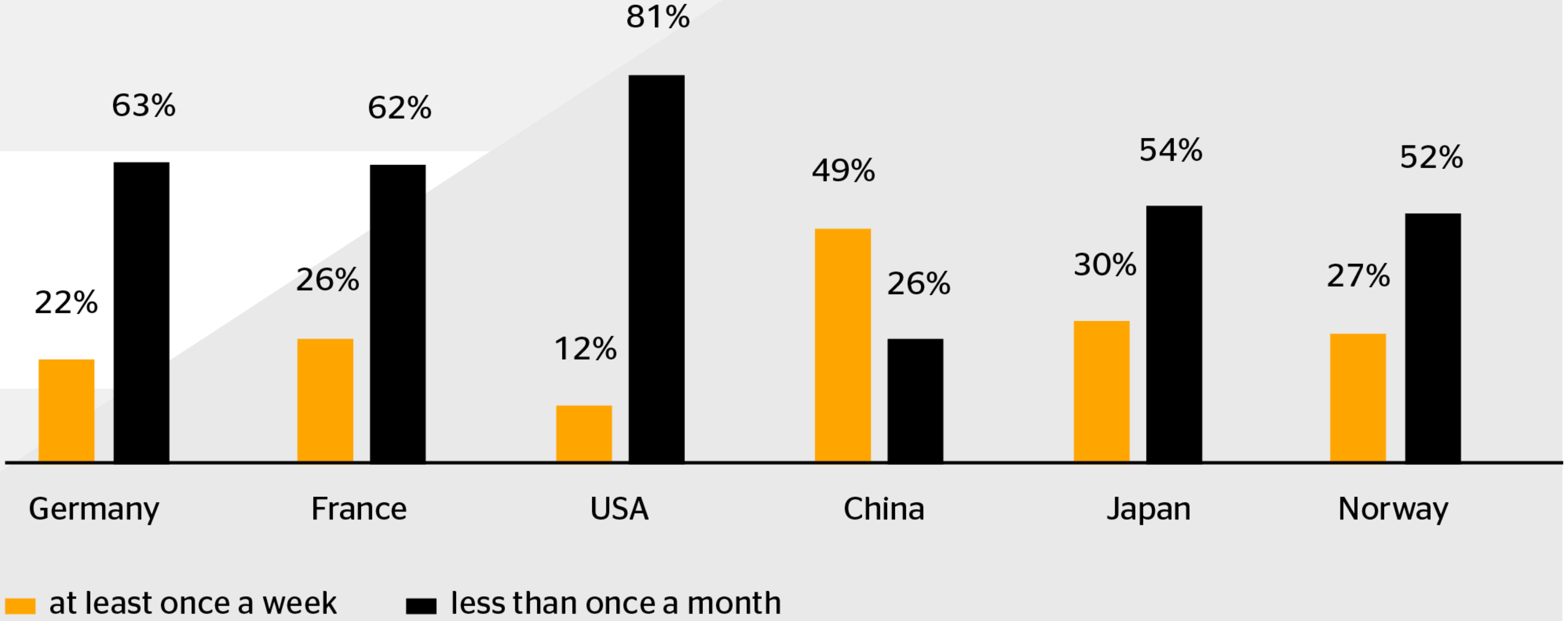
# BIKE USE

45 percent of the German population ride their bikes at least once a week. This is significantly more than in the other Western countries that are part of this study.
Only in China, bicycles are used even more frequently.

# USE OF PUBLIC TRANSPORT

When it comes to public transport, the gap remains wide. In Europe, around one in four people travel by bus or train at least once a week; in Asia, this applies to even more people. At the same time, more than half of the people (except in China) use public transport less than once a month.

Frequency of using public transport




Difference to 100%: at least once a month and “prefer not to answer”

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# PEOPLE EXPECT

## AFFORDABLE PERSONAL MOBILTY

Against the backdrop of rising energy prices, many people fear that personal mobility will no longer be available for everyone.

More than

# 70%

off all respondents are worried about the affordability of personal mobility.


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## THE AFFORDABILITY OF EMISSION-FREE MOBILITY

# IS A CENTRAL PREREQUISITE FOR THE SUCCESSFUL TRANSFORMATION OF TRANSPORT

**62%**

of all respondents do not think they can afford to buy an electric car in near future.

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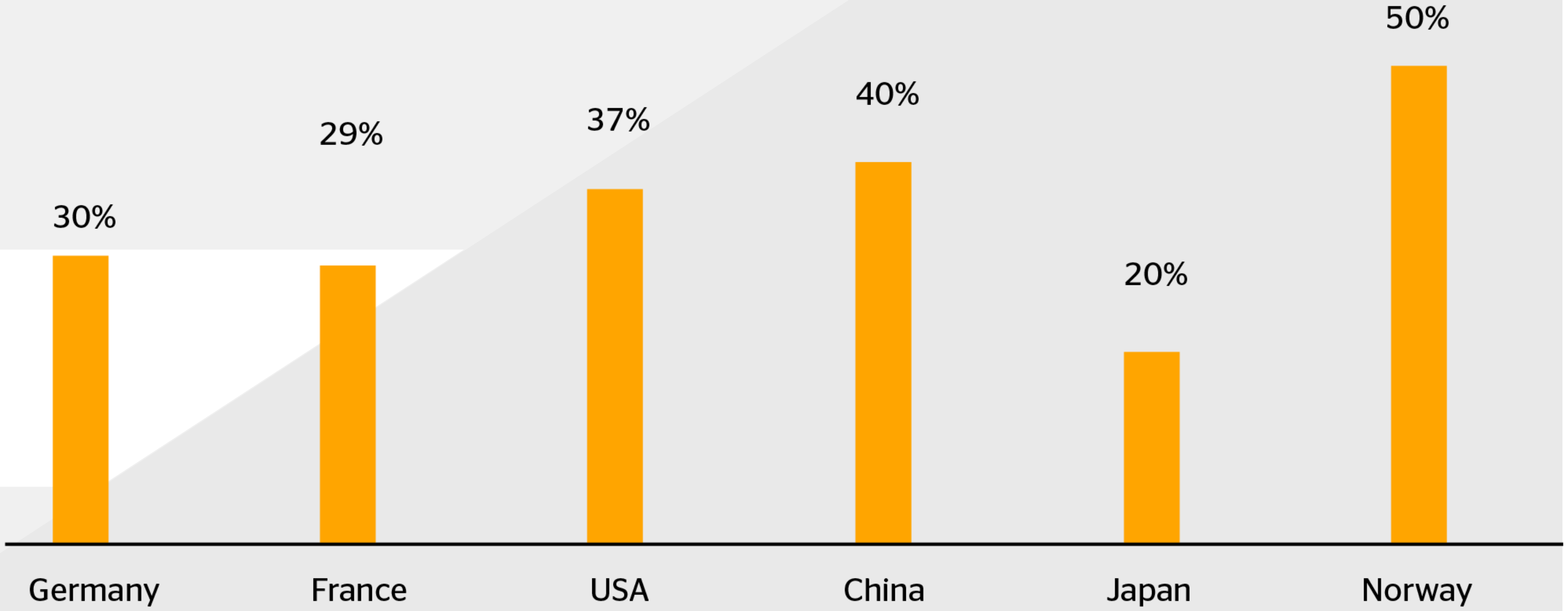
# THE COST OF TRANSFORMATION

Uncertainty about the running costs of an electric car is evident in many of the countries surveyed. Only Norway is an exception; apart from that, more than half of the respondents lack information.

"I feel well-informed about the running costs of an electric car."

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# A MAJORITY OF THE PEOPLE IN CHINA

## STATE THAT THEY WANT THEIR NEXT CAR TO BE AN ELECTIC ONE

83%

of Chinese respondents say that their next car will be an electric one. People in Western industrialized countries are more reserved, with more people opting for “no, definitely not.”

# FOCUS ON INDIVIDUAL LIMITS

Concerns about the affordability of personal mobility shape the view on technological developments. Although current technology in cars is important to many people, concerns about rising prices are even bigger.

79%

of German respondents think that latest technology only makes cars more expensive.

51%

of German respondents say that latest technology in their car is important to them.

## RISING FUEL PRICES

# ARE A BURDEN FOR MANY PEOPLE IN GERMANY


# €2.80

per liter is the price limit above which half of the respondents in Germany can no longer afford to drive.

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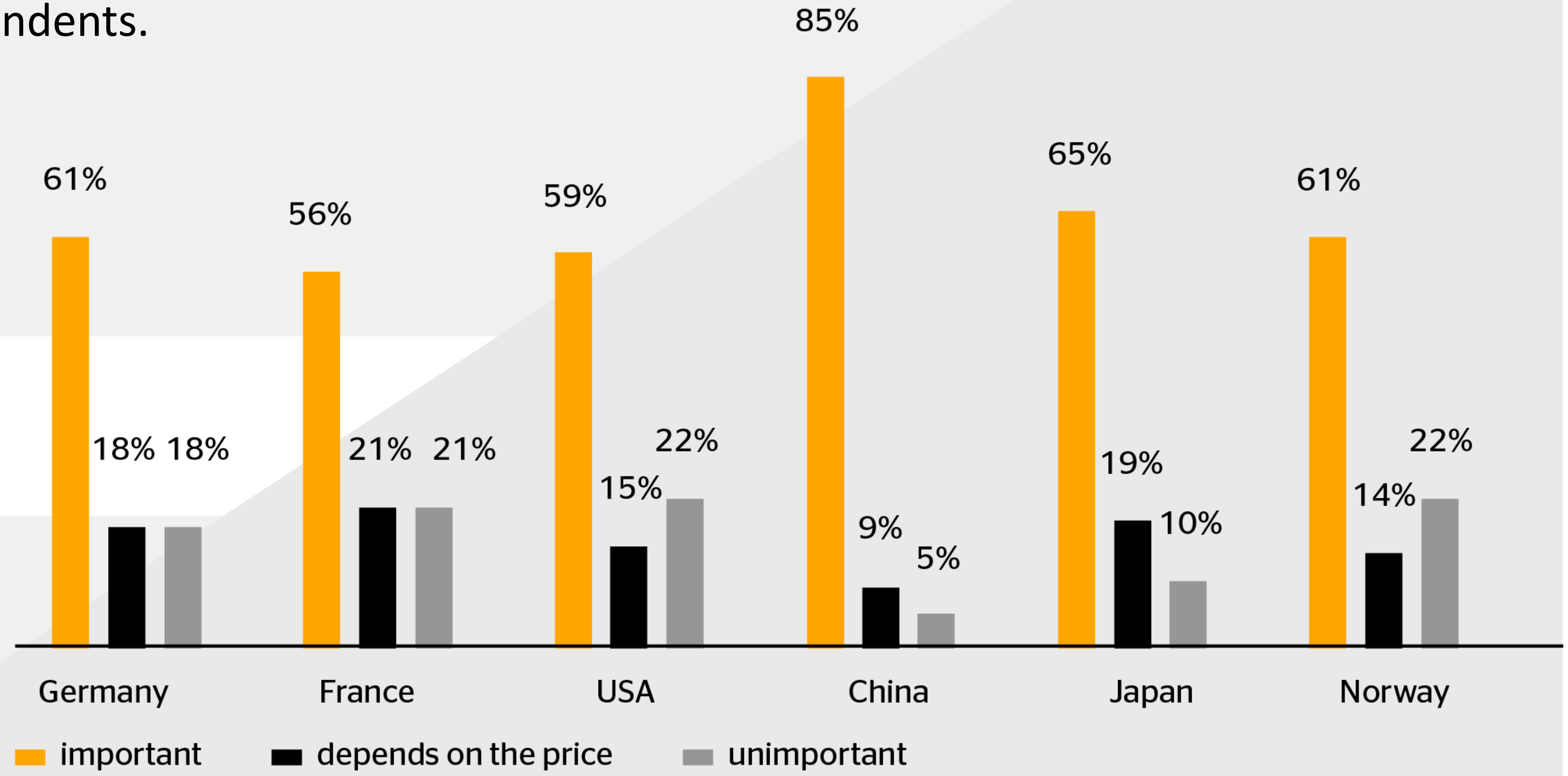
# TECHNOLOGY IN CARS

# ELECTRONIC ASSISTANTS

## Having electronic assistants in their next car appeals to many.

In China and Japan in particular, they are already a must haves for a significant proportion of respondents.

Electronic assistants in the next car

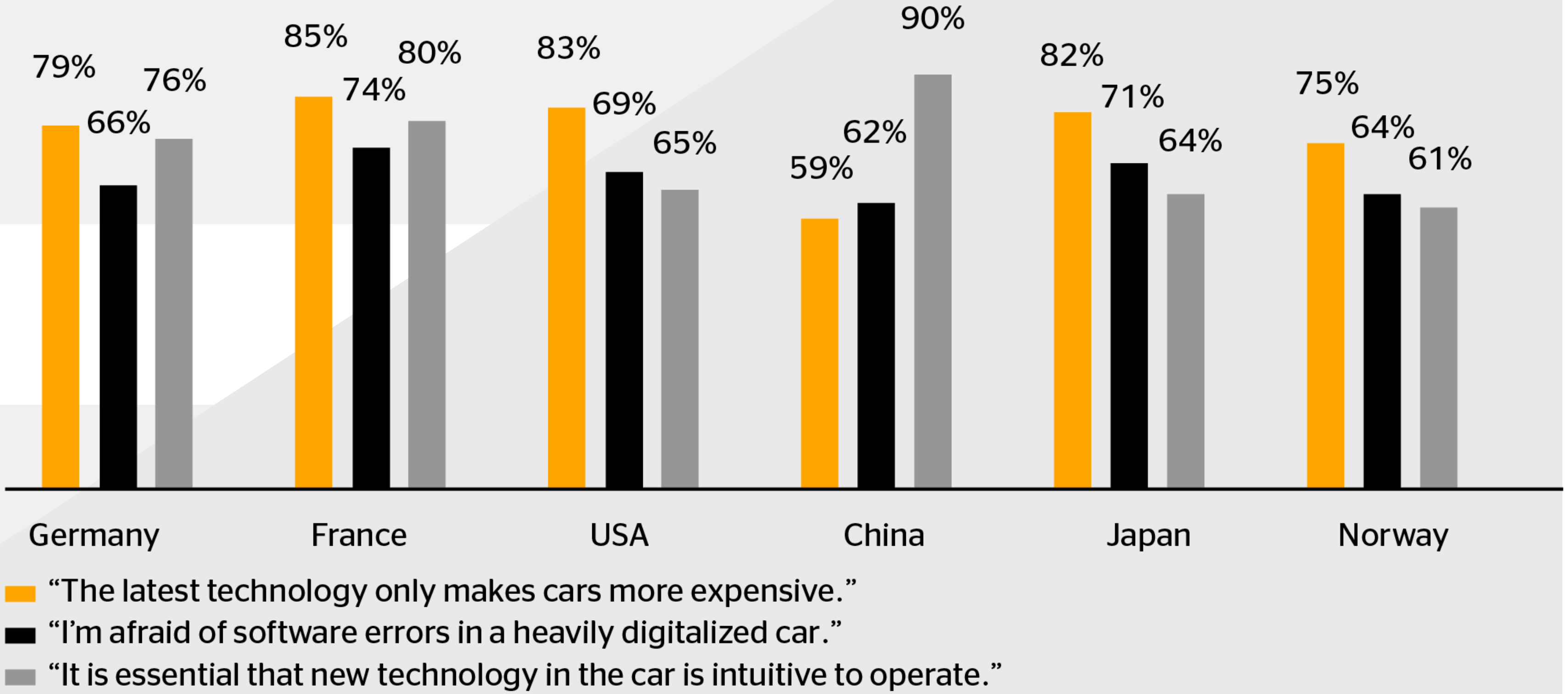



"important" sums up all respondents who say electronic assistants are "a must-have," "desirable," and who are already users today. Difference to 100%: "prefer not to answer"

# EXPECTATIONS TOWARD TECHNOLOGY IN THE CAR: AFFORDABLE, SAFE AND INTUITIVE

Concerns about software malfunctions, price increases and complicated usability shape many people's assessment of in-car technology.

Focus on usability




Individual statements with which respondents should agree / disagree

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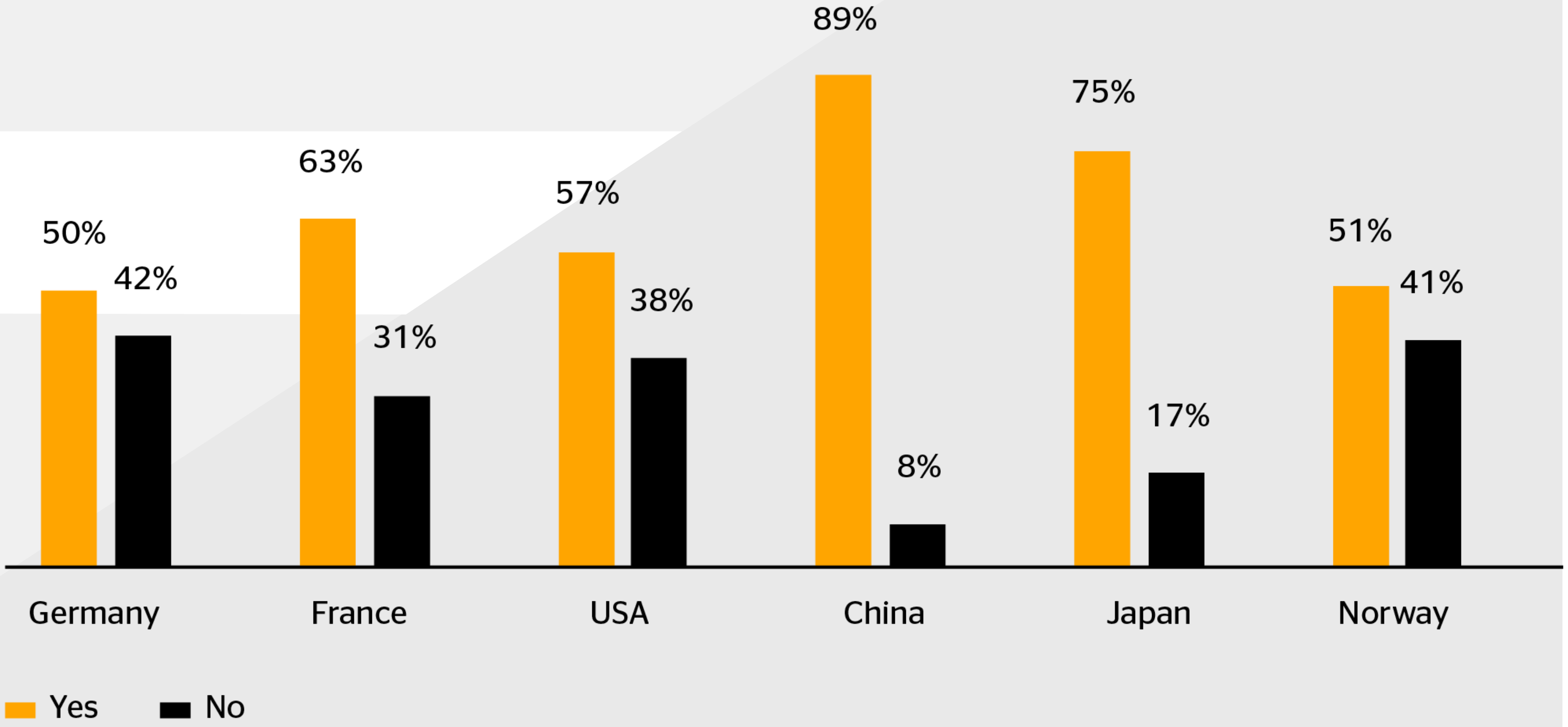
# AUTOMATED DRIVING

## Respondents in all six countries see automated driving as a useful development.

Still, people in Asia are much more open toward automated driving.

"Automated driving is a useful advancement."




Difference to 100%: "prefer not to answer"

# LIABILITY REGULATIONS

## ARE THE BASIS FOR AUTOMATED DRIVING

**78%**

of all respondents state that liability regulations are still unclear.

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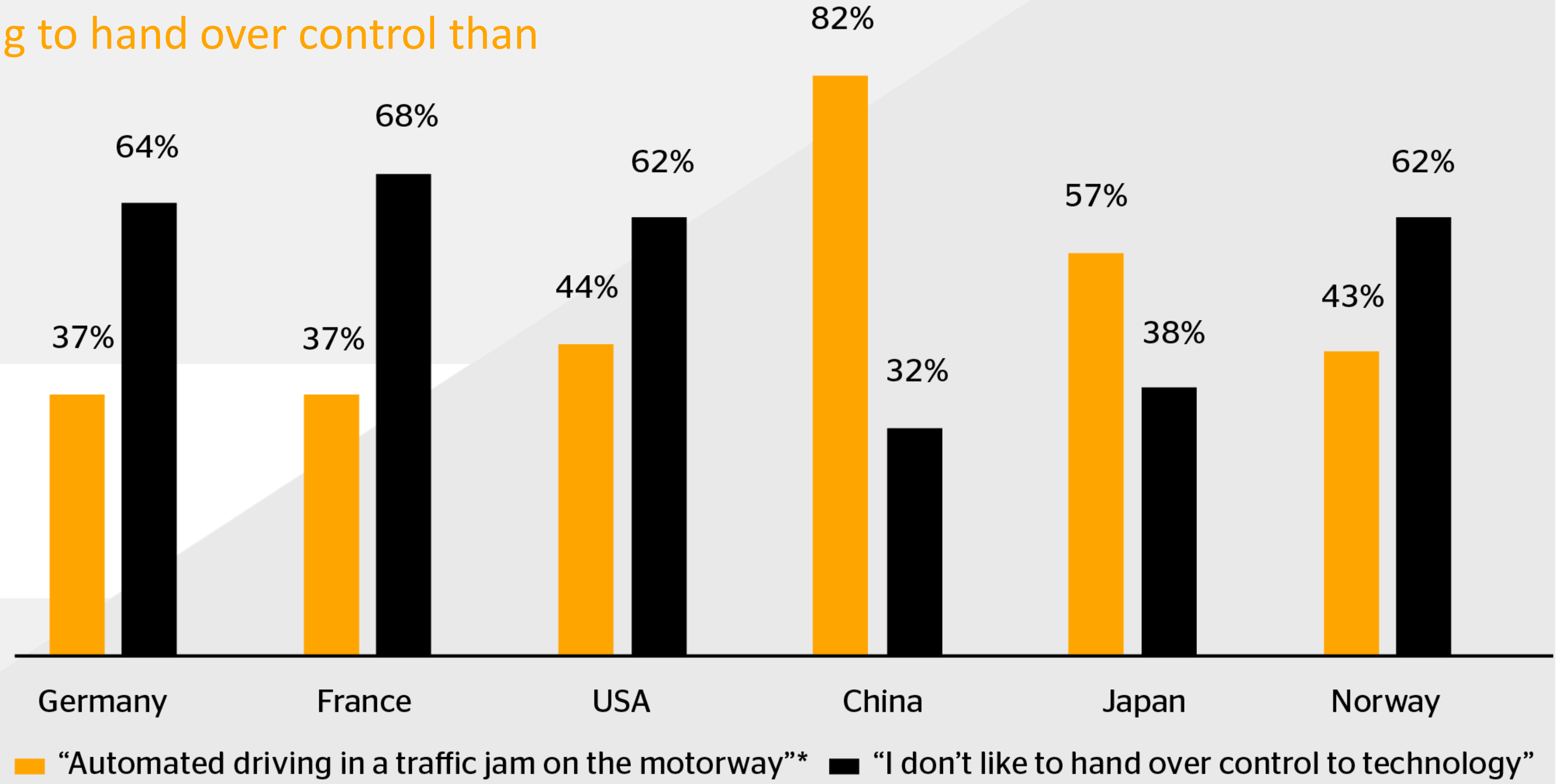
# MIXED EMOTIONS: AUTOMATED DRIVING ON HIGHWAYS

While the majority of the Chinese population is willing to drive automatically, people in other countries are more hesitant.
In Asia, more people are willing to hand over control than in any other country.

The Chinese population is fascinated by automated driving.




Individual statements with which respondents should agree / disagree
* Sum of respondents who say a congestion assistant is "a must-have," "desirable" and who are already users today.

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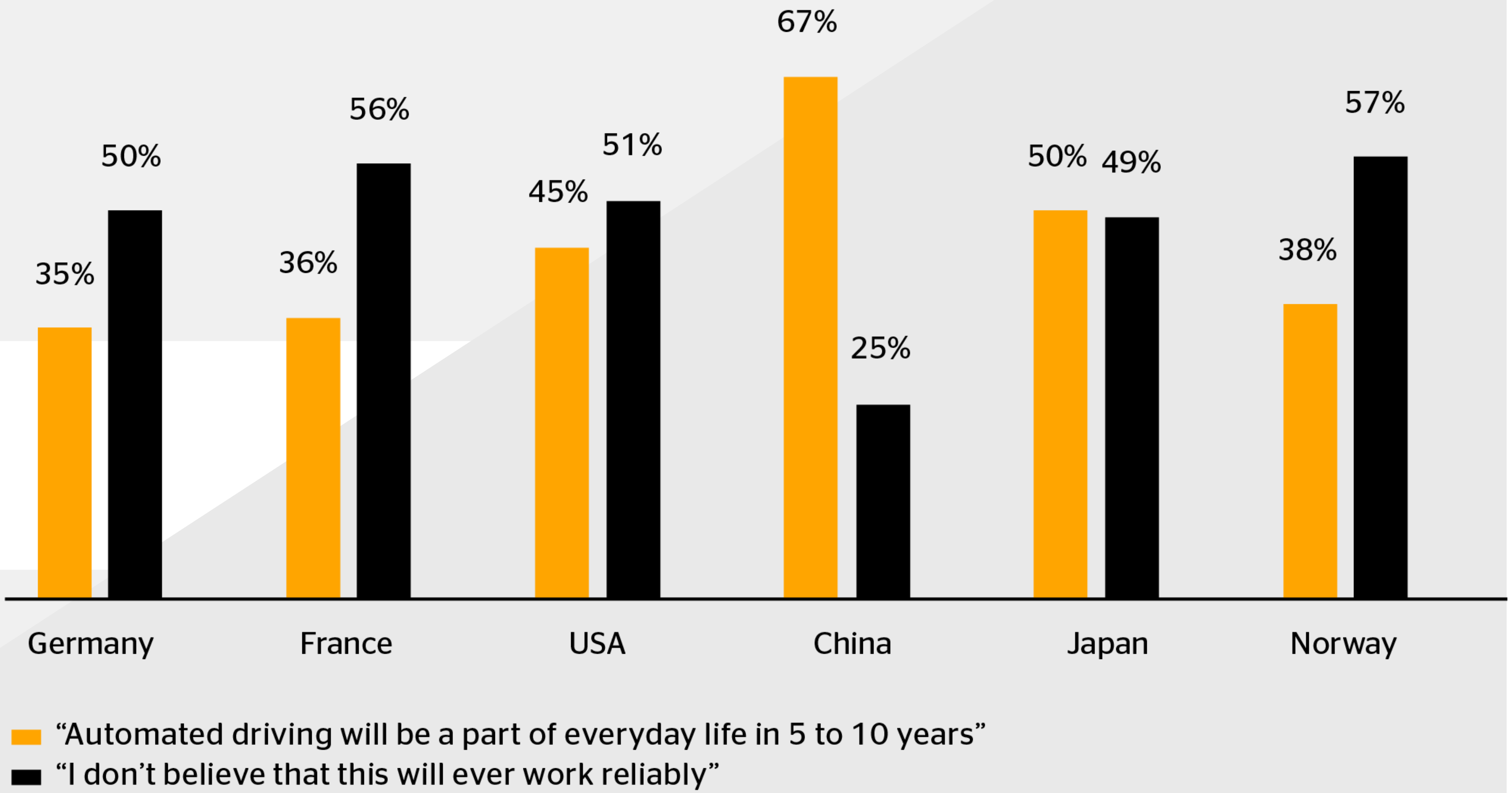
# AUTOMATED DRIVING IN PRACTICE

People in Europe and the USA still have to gain trust in the technology.

Many people in China believe that automated driving will be part of everyday life in a few years.




Individual statements with which respondents should agree / disagree

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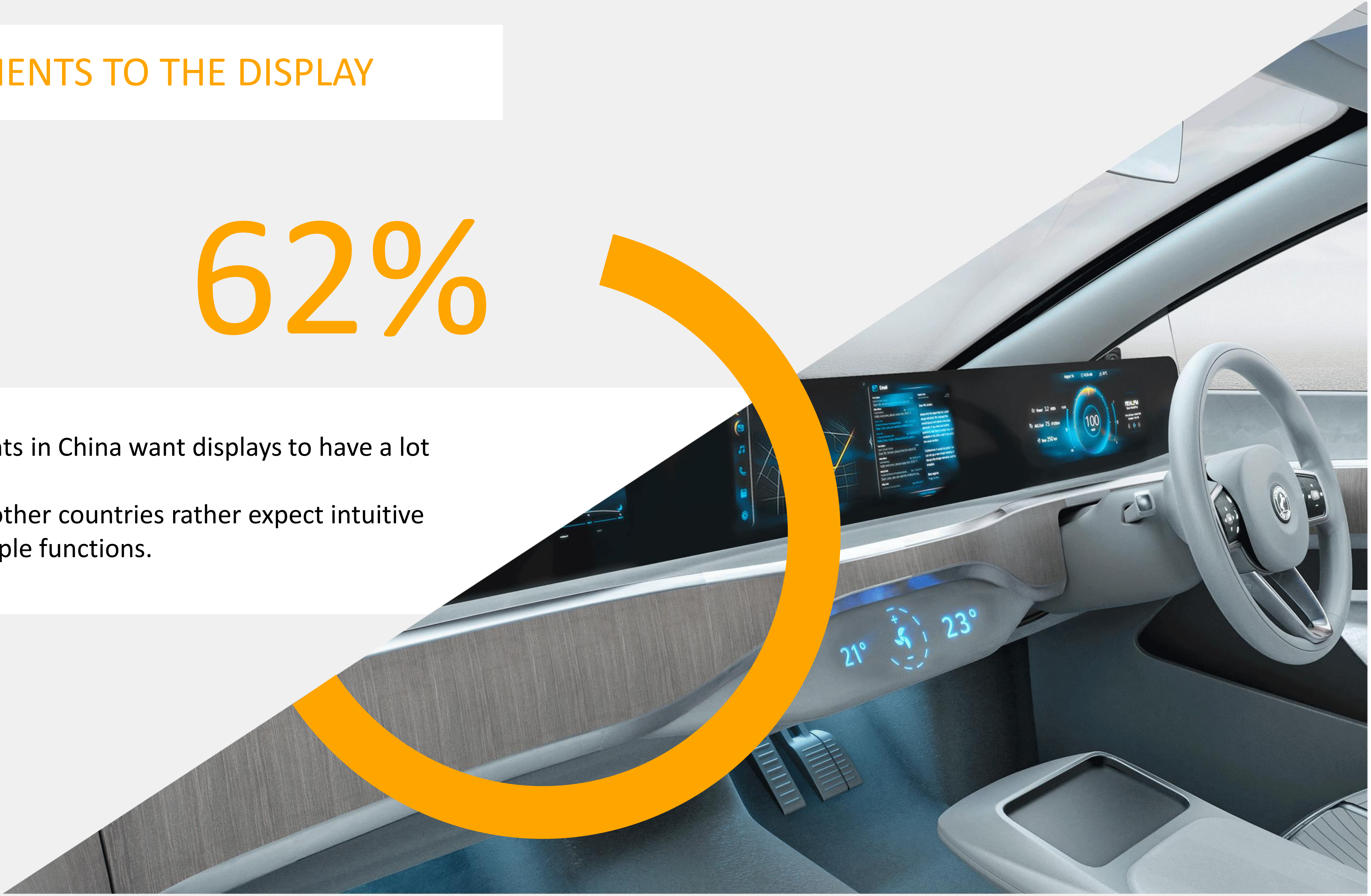
# AUTOMATED PARKING

# 81%

In China, there is a great desire for automatic parking. In Japan, cost consciousness prevails. In Europe and the USA, people are more hesitant.

# IMPROVEMENTS TO THE DISPLAY




62%

of the respondents in China want displays to have a lot of functions.
Respondents in other countries rather expect intuitive usability and simple functions.

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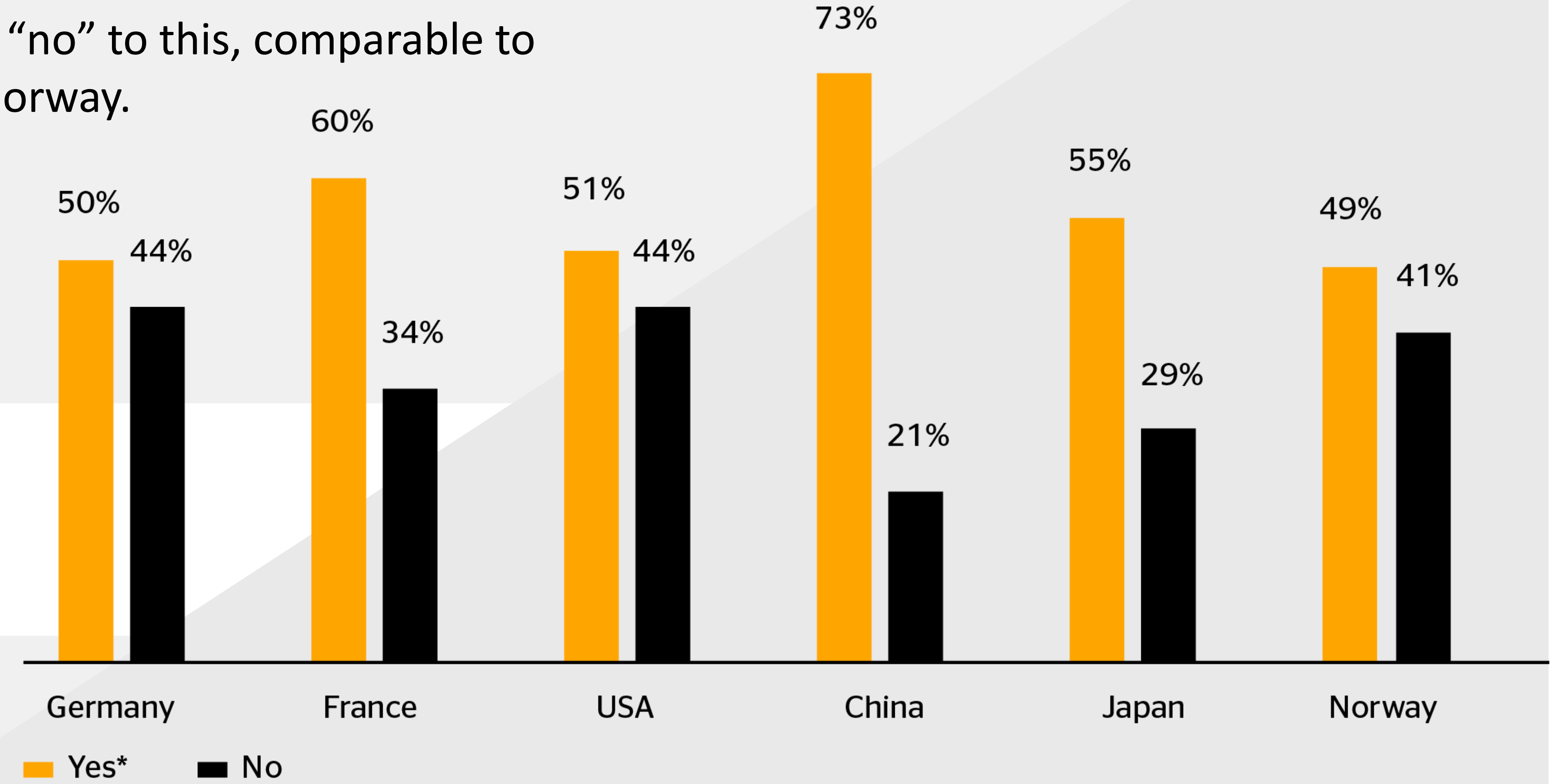
# SUSTAINABLE MOBILITY

# AROUND HALF OF THE RESPONDENTS IN GERMANY WOULD PAY MORE FOR A MORE SUSTAINABLE CAR

However, 44% also clearly say “no” to this, comparable to respondents in the USA and Norway.

Willingness to pay more for an environmentally-friendly car




* “Yes” sums all respondents who say “if the car as a whole has a slightly better carbon footprint than a conventional vehicle,” “if the car as a whole has a significantly better carbon footprint than a conventional vehicle,” “if the car is completely climateneutral in both production and use” and who already pay more for an environmentally-friendly car. Difference to 100%: “prefer not to answer”

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# WILLINGNESS TO PAY FOR SUSTAINABILITY

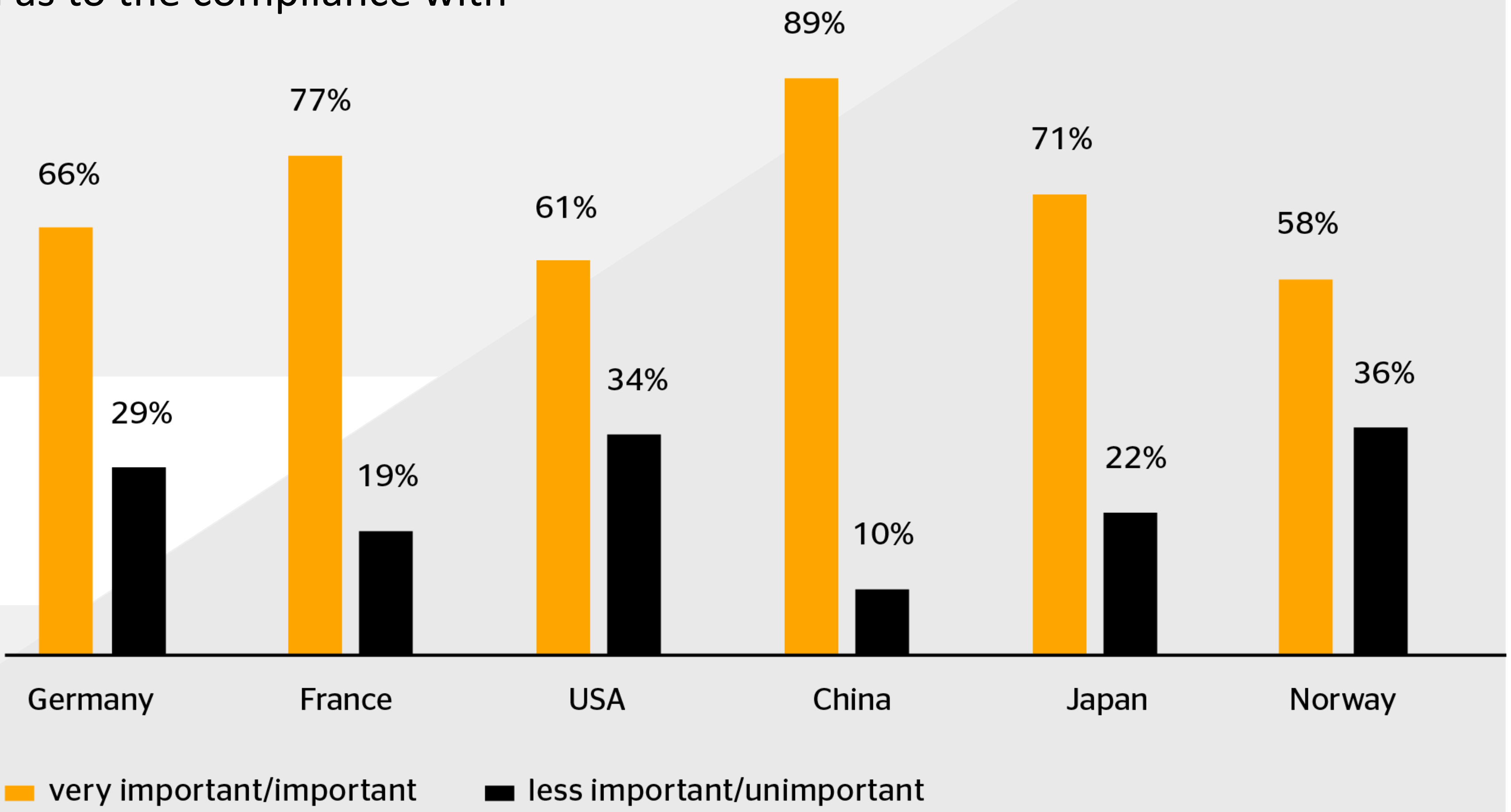
**42%**

of respondents in Germany would pay more for a sustainable interior (low-emission, free of animal products and pollutants). A similar share of people would accept a higher price for sustainable fuels or recycled materials in tires or technical components.

# MANY EXPECT CERTIFIED SUSTAINABLE PRODUCTION

People increasingly pay attention to the certification of sustainable production, as well as to the compliance with human rights.

Importance of certification of sustainable and environmentally-friendly mobility products




Individual statements with which respondents should agree / disagree

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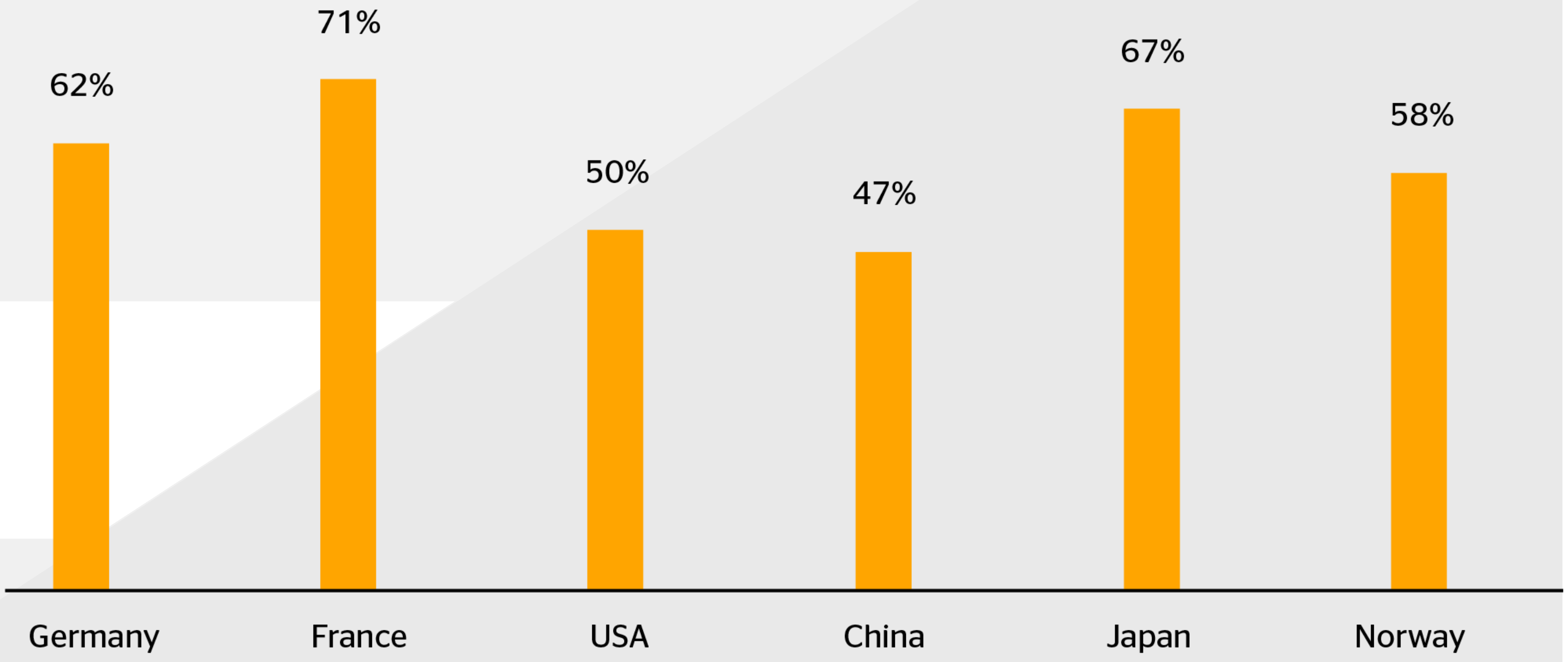
# UNCERTAINTY IN THE ASSESSMENT OF DRIVE SYSTEMS

People in all countries surveyed are unsure which type of drive can be considered as sustainable.

“I do not have sufficient information about which type of drive is actually most sustainable.”




Individual statements with which respondents should agree/disagree

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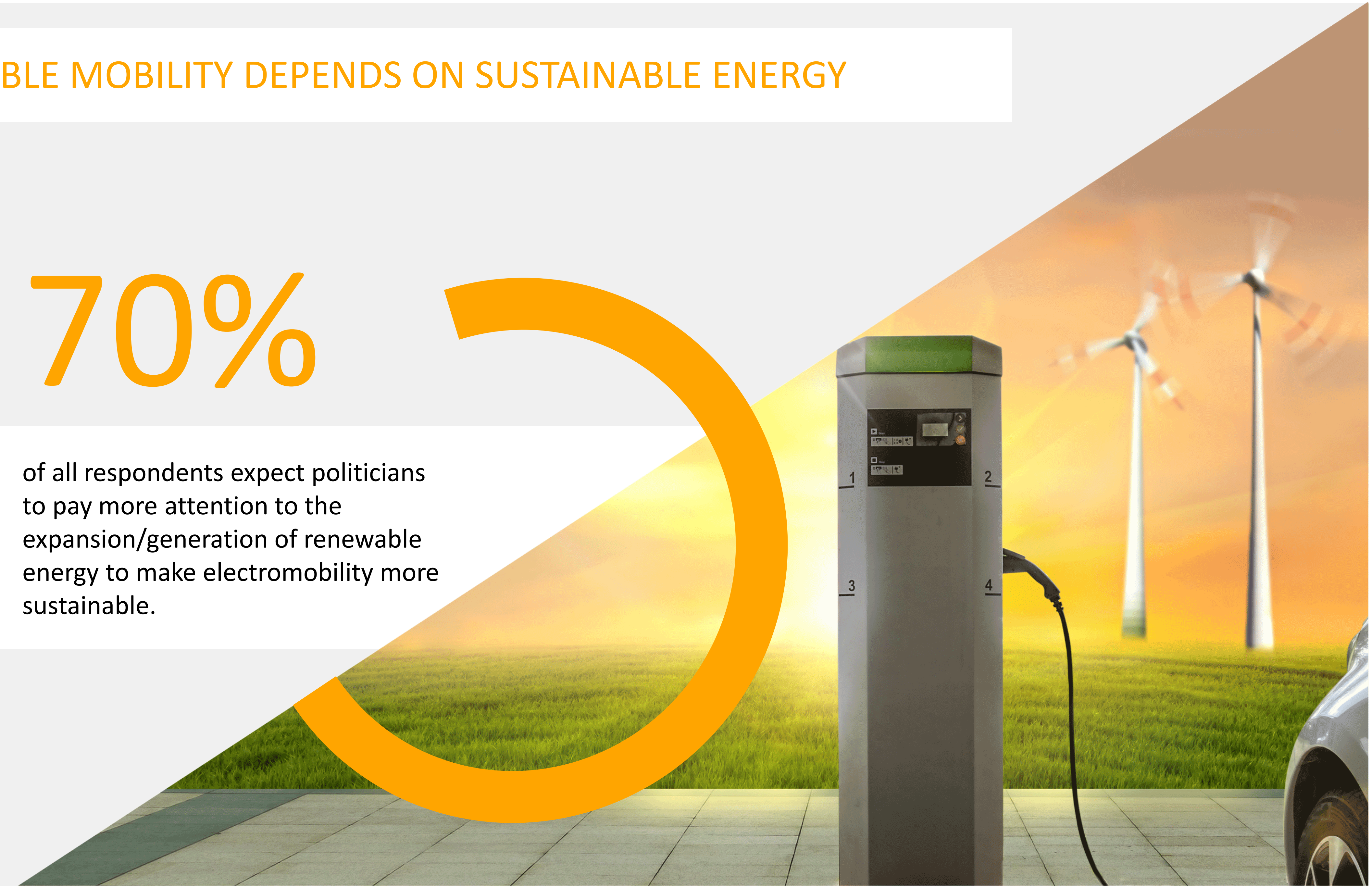
# SUSTAINABLE MOBILITY DEPENDS ON SUSTAINABLE ENERGY

70%

of all respondents expect politicians to pay more attention to the expansion/generation of renewable energy to make electromobility more sustainable.

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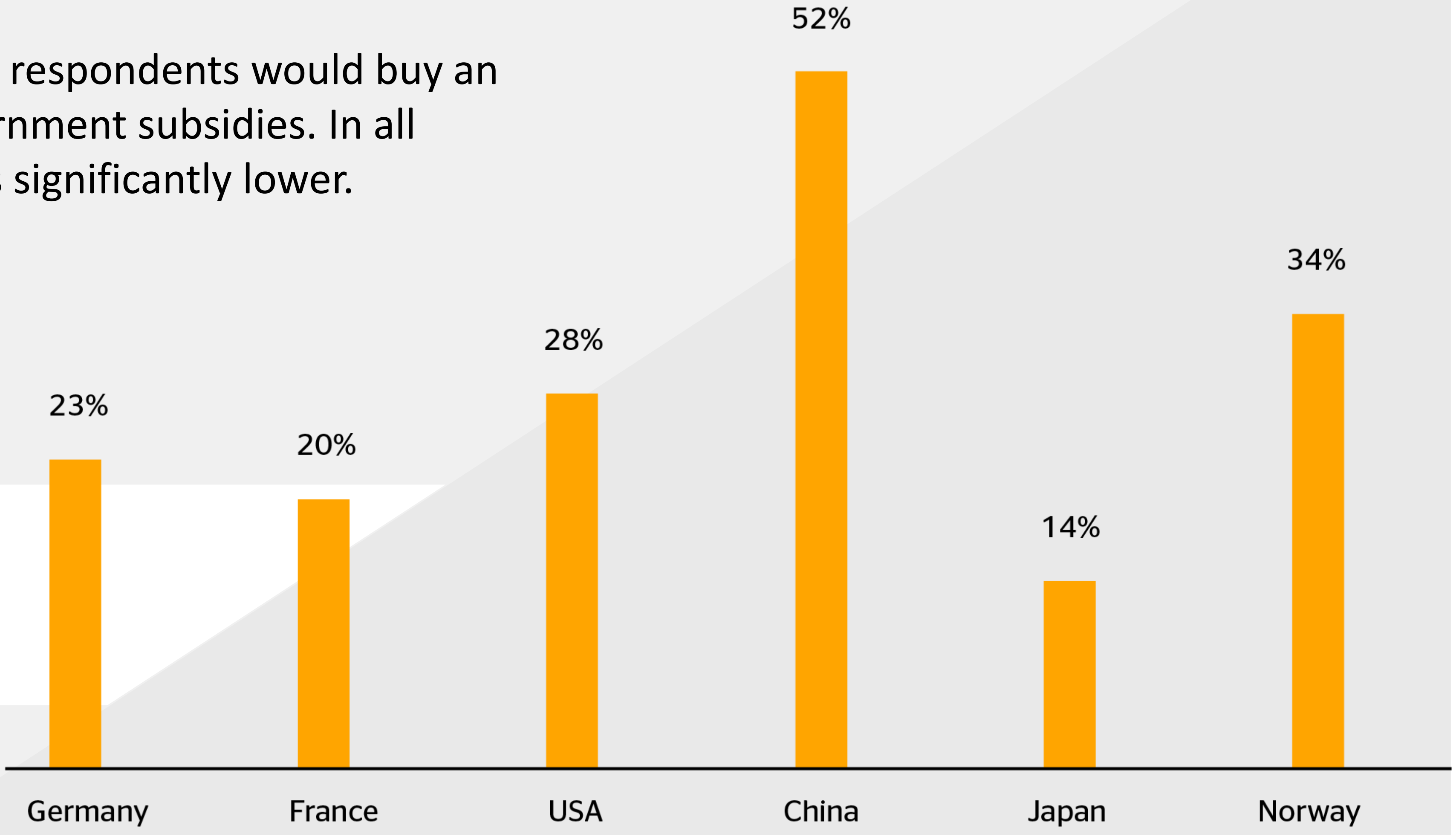
# TRANSFORMATION BY DESIGN

In China, more than half of the respondents would buy an electric car even without government subsidies. In all other countries, this number is significantly lower.

Willingness to buy an electric car even without government subsidies



# PEOPLE PREFER TO PROMOTE CLEAN MOBILITY, NOT PENALIZE OTHER ALTERNATIVES

Clear majorities are in favor of lowering the costs of environmentally-friendly cars. Only in China, there is also a majority in favor of monetary sanctions for combustors.

**77%**

of respondents in Germany say the government should make sustainable mobility more affordable.

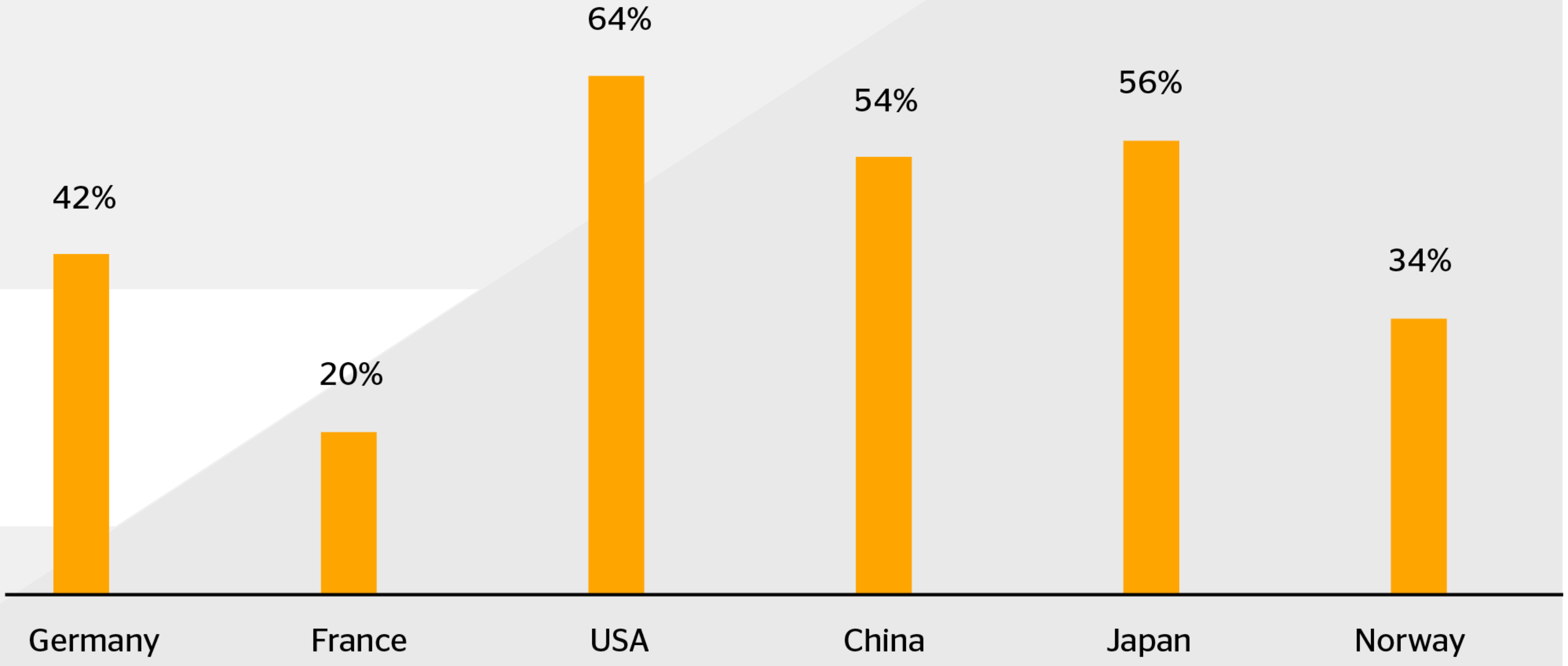
**21%**

of respondents in Germany support a greater financial burden on drivers of combustion vehicles.

# LOCAL PRODUCTION

Buying a locally produced car is important to many. This is especially relevant for people in the USA, Japan and China.

Willingness to pay more for a locally produced car.




Willingness to pay, "significantly more" or "somewhat more" for a car from local production.

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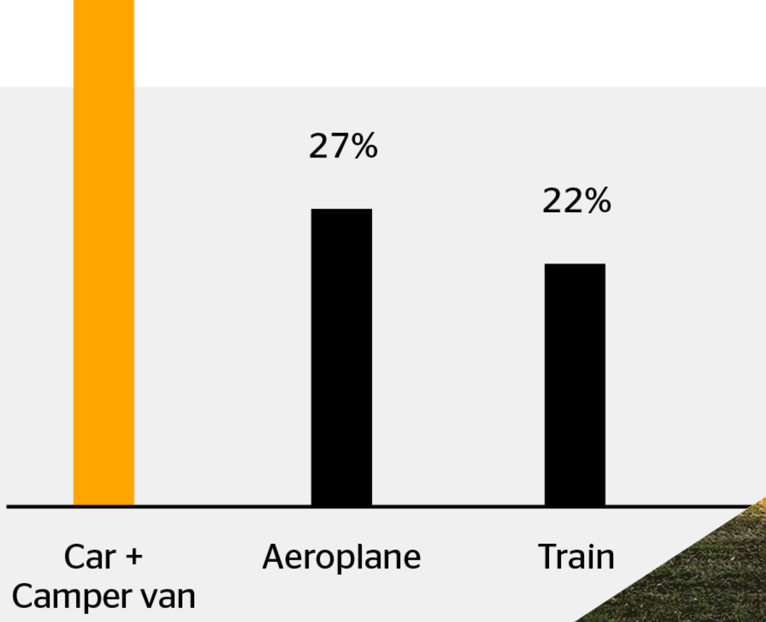
## WATER, AIR OR GROUND

# CARS AND THEIR ROLE FOR TRAVEL HABITS

# MEANS OF TRANSPORT FOR THE SUMMER VACATION

The car remains the pillar for vacation travel in the summer: More than every second German wants to travel by car or camping/camper van – more than by train and plane together.




Multiple answers possible

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# ONLY A MINORITY WANTS TO CHANGE THEIR MOBILITY BEHAVIOR

When asked about future mobility, the majority in all countries answered that they will still predominantly travel by car. In China, the majority of respondents even plans to increase car use.

The group of those who are likely to drive more in the future is significantly larger in each country than the group of those who are planning to drive less.

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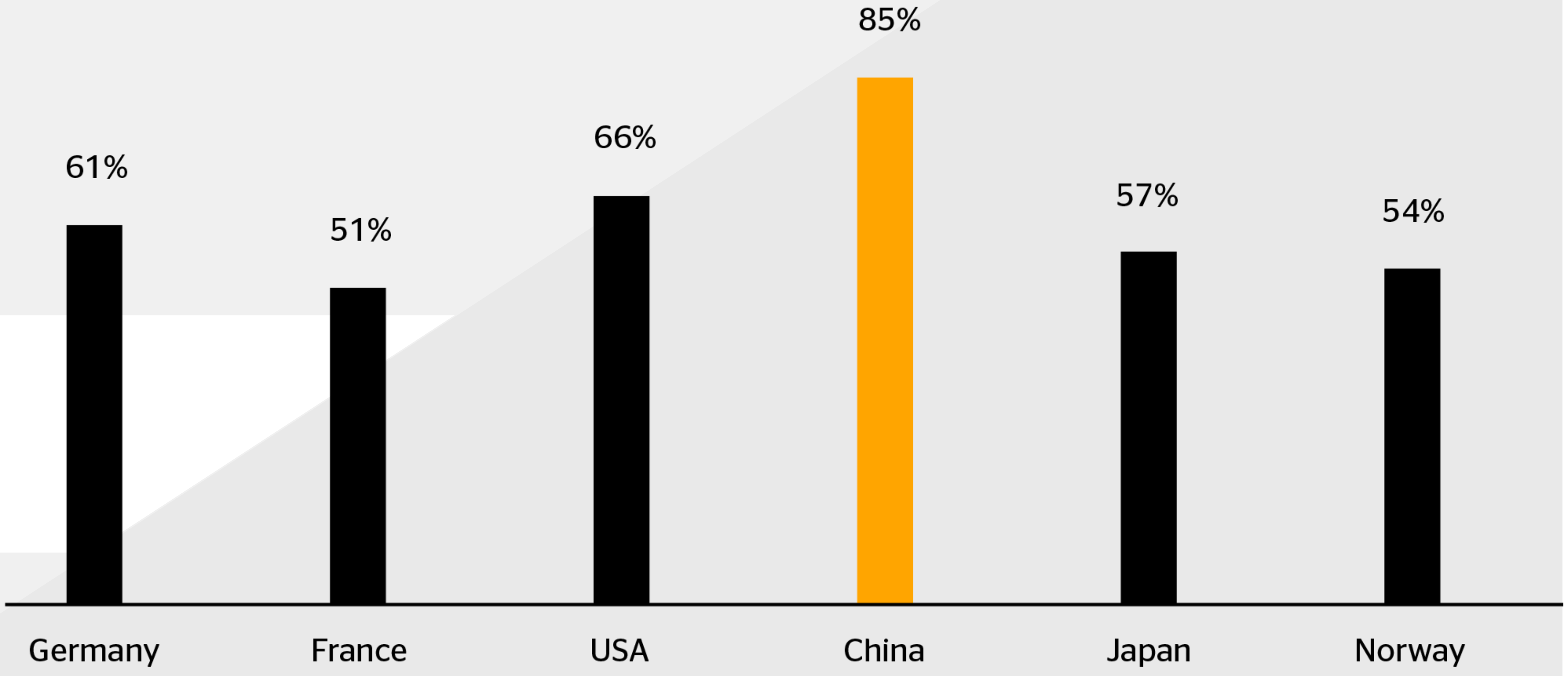
# TRAVELING DURING A PANDEMIC

The pandemic has made the car a travel retreat again for many people.

The pandemic has made the comfort and convenience of my own car more important to me when it comes to vacations.

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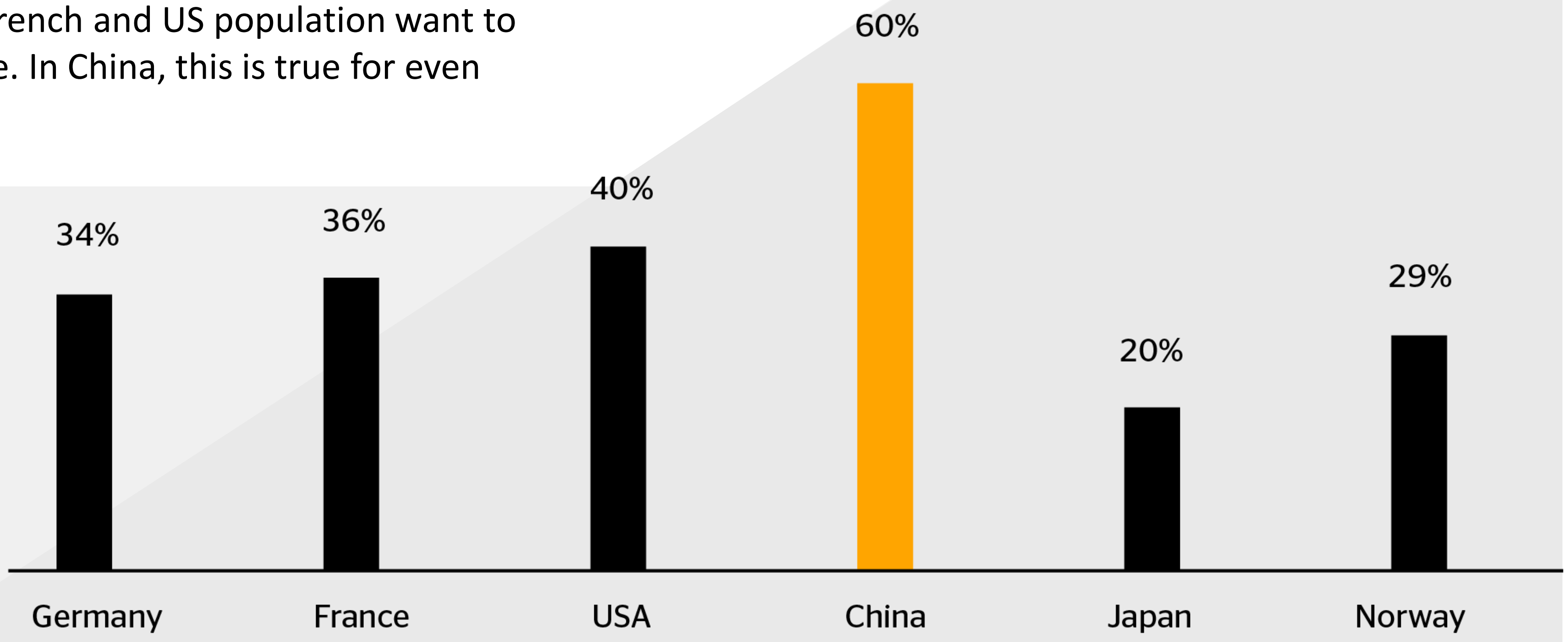
# THE BEAUTY AT YOUR DOORSTEP

71%

of all respondents say that a vacation trip does not have to be far away.

# DESIRE TO TRAVEL BY CAMPER VAN

More than one third of the German, French and US population want to travel with a camper van/mobile home. In China, this is true for even more than half of the population.

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# THE CAR AS A PLACE OF RETREAT

54%

of those surveyed in the study see their own car as a personal retreat.

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