



Mobility Study 2024 Key Findings



The Continental Mobility Study 2024

For the Continental Mobility Study 2024, Continental commissioned infas to conduct a representative survey of around 5,000 people from five countries on their mobility behavior and the topics of automated driving and the affordability of (sustainable) mobility. The survey also covered topics such as artificial intelligence in the mobility sector, user experience, sustainable mobility concepts and mobility in urban areas.

Online interviews in China (1,000), Germany (1,000), France (1,000), Japan (1,000) and the USA (1,000) in August 2024.

The samples are representative of the respective populations and of the urban population in China.



Key Findings

The car remains the main pillar of mobility

- › Car ownership continues to be highly relevant in all countries. Alternatives are particularly attractive to younger people. Overall, the car is equally important for people of all ages.
- › Younger people are more aware of their car use within the mobility mix and tend to see it as one of several mobility options.
- › Cars are seen as a prestige item, especially among younger people, who have high expectations in terms of technology.

Affordability of personal mobility is a major concern for many

- › Many people are worried that driving could become too expensive for them.
- › Increasing energy prices are a major reason for this concern, as well as regulatory interventions that could make driving more expensive.
- › Many people believe they cannot afford an electric car.

Many people are supportive of sustainable personal mobility

- › Sustainability matters to many respondents. They have two clear expectations of their governments: that they create a framework for sustainable personal mobility, but at the same time keep it affordable.
- › Regulatory interventions in the interests of sustainability are accepted, provided they do not lead to price increases.
- › Younger respondents are less price-sensitive: they are prepared to pay a premium for sustainable products. They are more likely to also accept regulatory interventions that make driving more expensive.

Key Findings

Electric mobility still a marginal topic

- › Electric mobility does not play a role for most respondents. With the exception of China, no country in the survey has a significant share of electric cars.
- › Younger people are more likely to consider switching to an electric car than older people.
- › Hybrid vehicles already play a major role in Japan. These could also become relevant as a bridging technology in the other countries surveyed: many people who refuse to buy a fully electric car see a hybrid as an alternative.

Assistance systems and user experience are highly significant

- › Assistance systems are becoming increasingly common in cars, as is their acceptance and desirability. The desire to use assistance systems has grown internationally in recent years. The latest technologies are particularly important in China.
- › Many people attach great importance to the usability of in-car technologies. There is a clear desire for large displays and intuitive operation.

Autonomous driving and the role of artificial intelligence in cars

- › In Germany, around half of those surveyed have a positive view of autonomous driving. This is much more widespread in Asia, especially in China.
- › Many people would like to have AI assistants in their cars. This desire is particularly pronounced among younger people and respondents who tend to travel long distances by car.

The changing role of the car among younger people

- › For the majority of respondents, the car is still above all a safe means of transportation. However, young people in particular also see it as a place of retreat as autonomous driving progresses.

The Car Remains the Main Pillar of Mobility

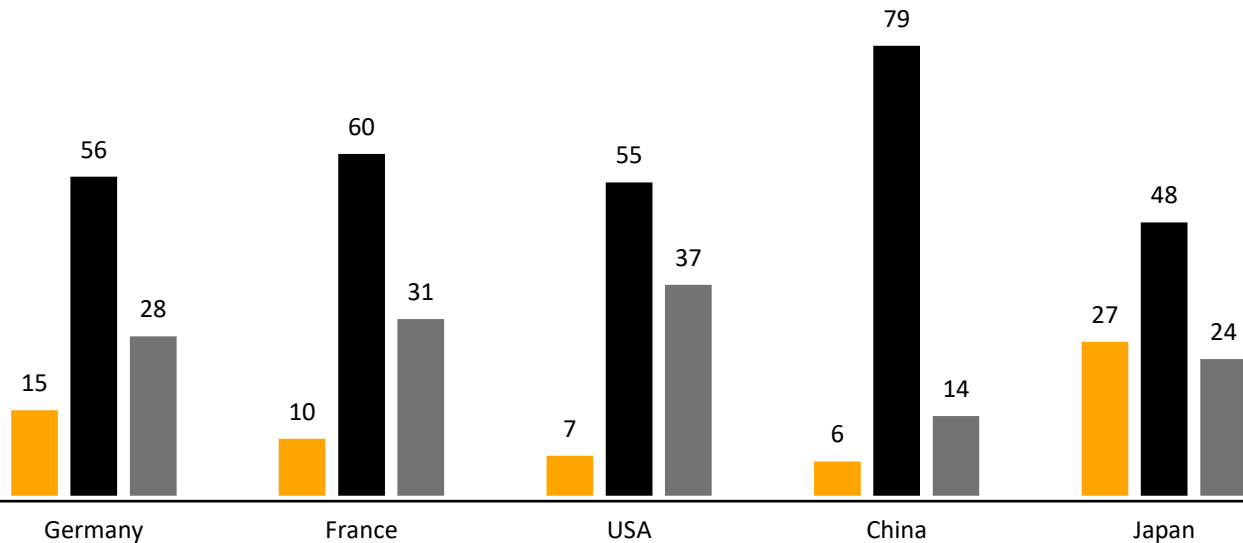


The Car: a Universal Commodity

Number of available cars per household.

0
1
2+

Owning a car remains the norm in 2024.

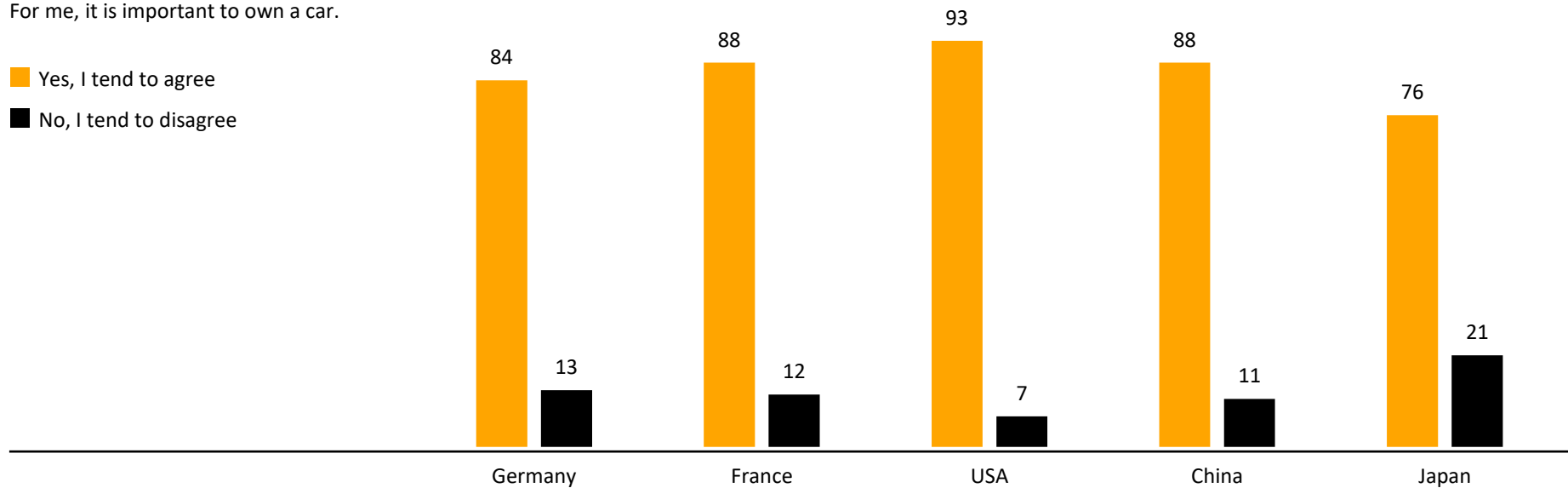


Figures in percent. Differences to 100 percent are due to rounding.

Better to Own than Just Use

For me, it is important to own a car.

- Yes, I tend to agree
- No, I tend to disagree



Figures in percent. Difference to 100 percent: "Prefer not to say." Basis: car owners.

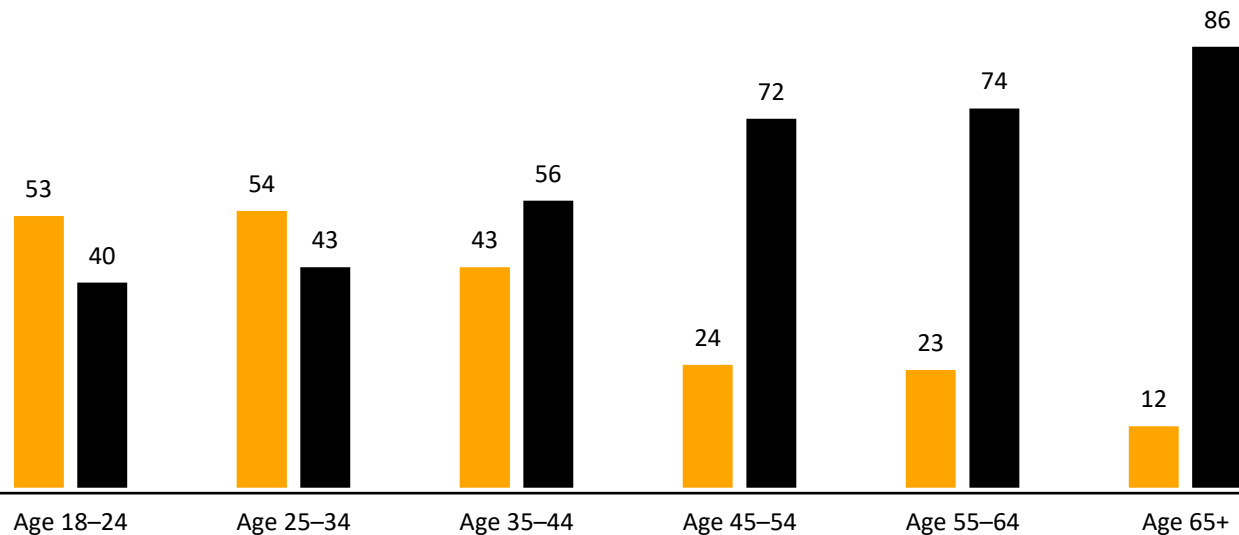
The Car as a Status Symbol

Germany

For me, a car is a status symbol.

- Yes, I tend to agree
- No, I tend to disagree

Cars are a status symbol for young people in particular.



Figures in percent. Difference to 100 percent: "Prefer not to say." Basis: Germany, car owners.

Affordability of Personal Mobility Is a Major Concern for Many



Affordability of Personal Mobility

Germany

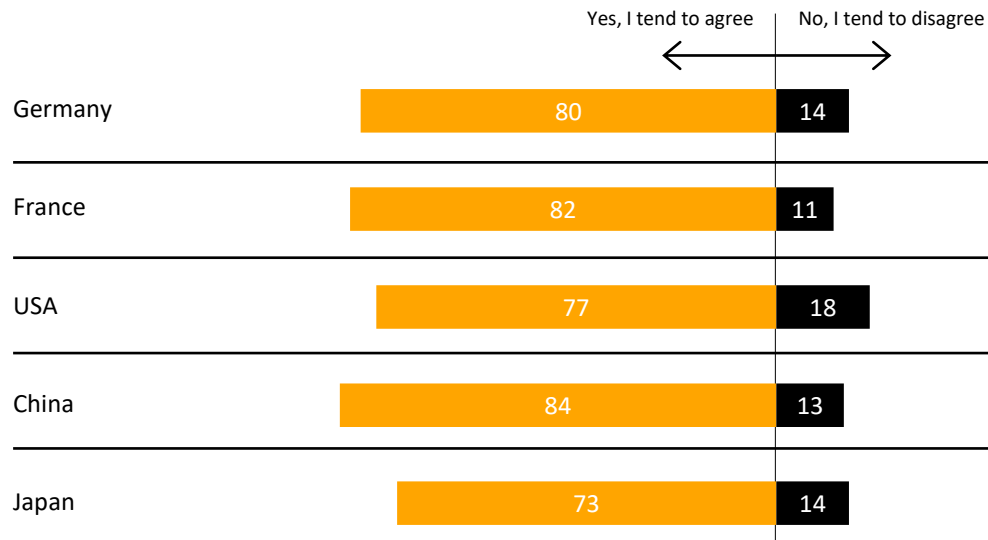


71%

of respondents in Germany are worried that rising energy prices could make driving too expensive for them.

Desire for Affordable Mobility Guarantee

The government needs to set general conditions to ensure that driving remains affordable.



Figures in percent. Difference to 100 percent: "Prefer not to say."

Affordable and Sustainable Mobility



56%

More than half of all respondents state that environmentally friendly mobility is not a priority for them in view of rising energy prices.

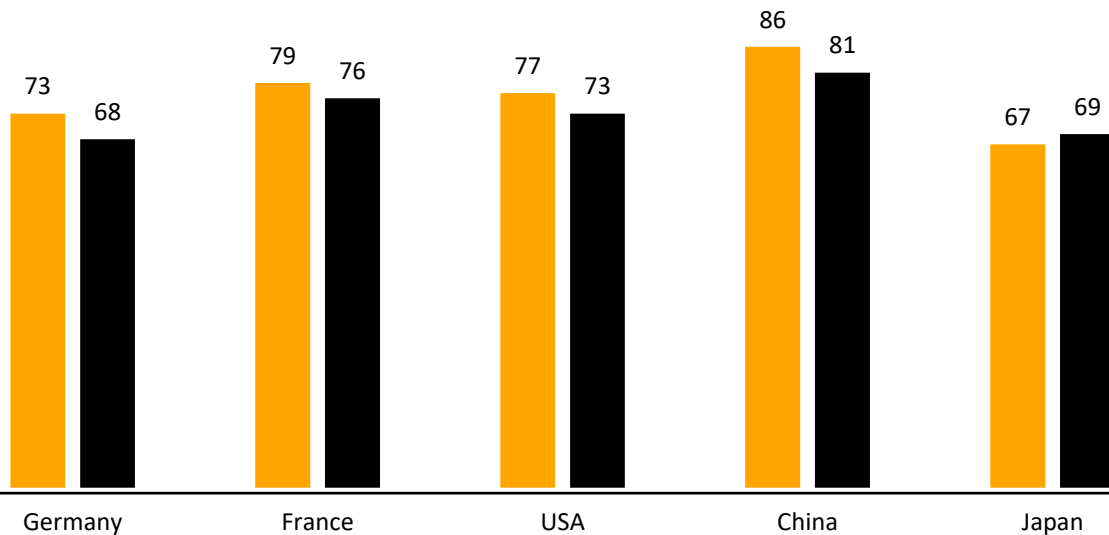
Many People Want Sustainable Personal Mobility



Environmentally Friendly Personal Mobility Should Be Subsidized

Do you agree with the following statement?

- The cost for environmentally friendly cars should be reduced in the country where you live.
- The government must ensure that environmentally friendly transportation is cheaper than environment-damaging transportation.



Figures in percent. "Yes, I tend to agree" shown.

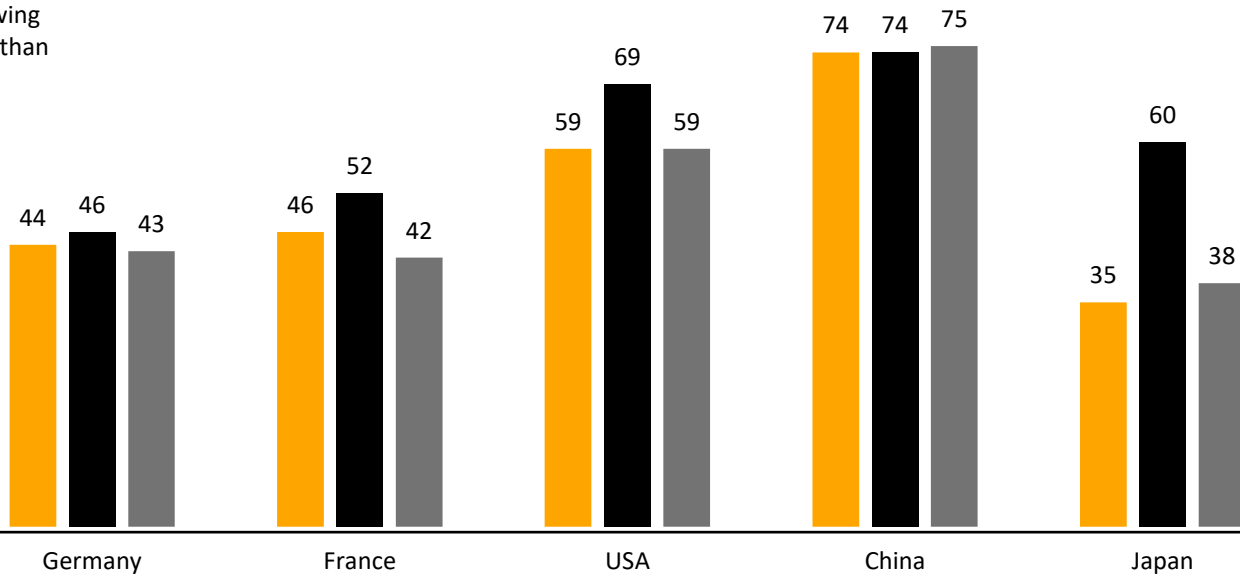
Willingness to Pay for Environmentally Friendly Alternatives

Would you be willing to pay more for the following sustainable, environmentally friendly products than for current conventional products?

■ Tires made from renewable and/or recycled materials?

■ A car made in your country?

■ A vehicle interior (e.g. seat covers) made from a material that is low-emission, without animal products and free of pollutants?



Figures in percent. Difference to 100 percent: "Buying this product is generally not an option for me" and "Prefer not to say."
Total of answers "Significantly more" and "Somewhat more" shown.

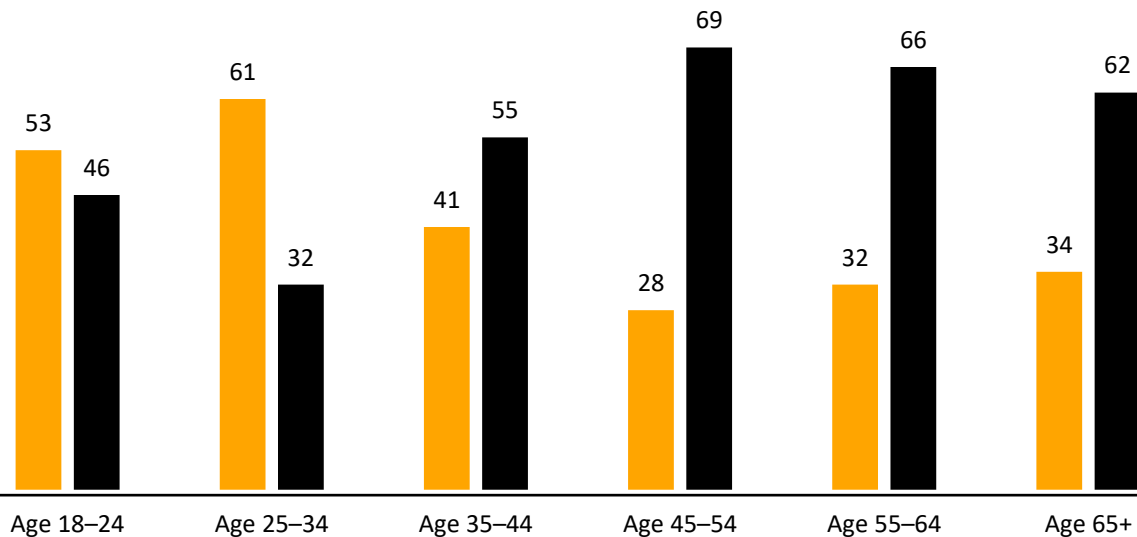
Significance of Recycling

Germany

When purchasing tires, do you think about what will happen with your tires at the end of their lifetime – keyword “recycling”?

Yes

No



Figures in percent. Yes: total of answers “Yes, definitely” and “Probably”; No: total of answers “No, definitely not” and “Probably not.”
Difference to 100 percent: “Prefer not to say.” Basis: Germany.

Electric Mobility – Still a Marginal Topic



Electric Mobility Does Not Play a Significant Role – Except in China

What type of fuel does the car have that you normally use?

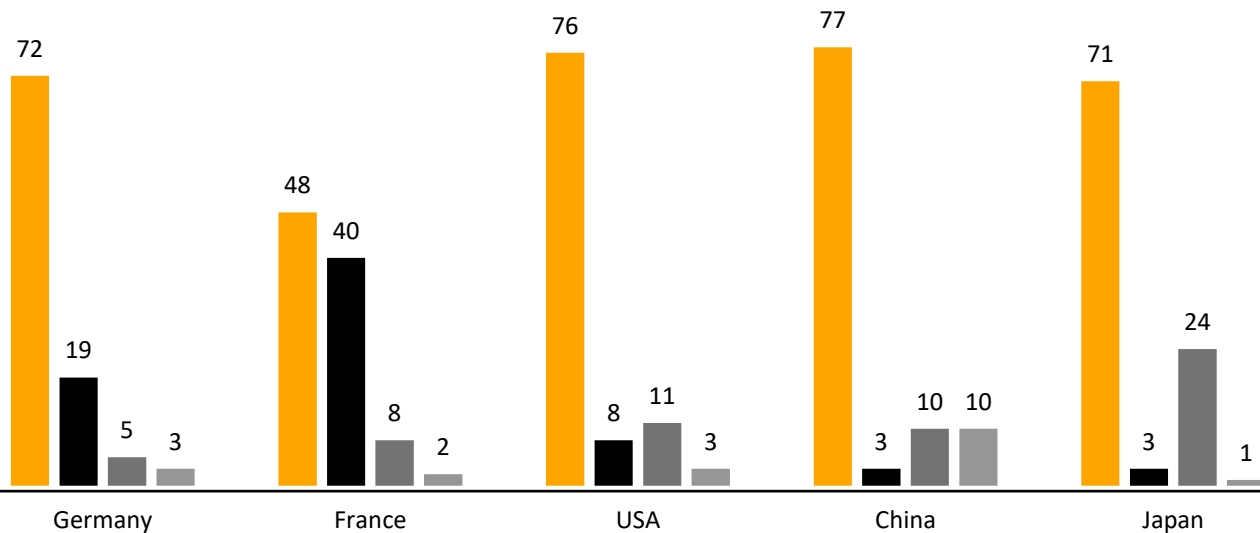
Gasoline

Diesel

Hybrid (combustion plus electric)

Electric

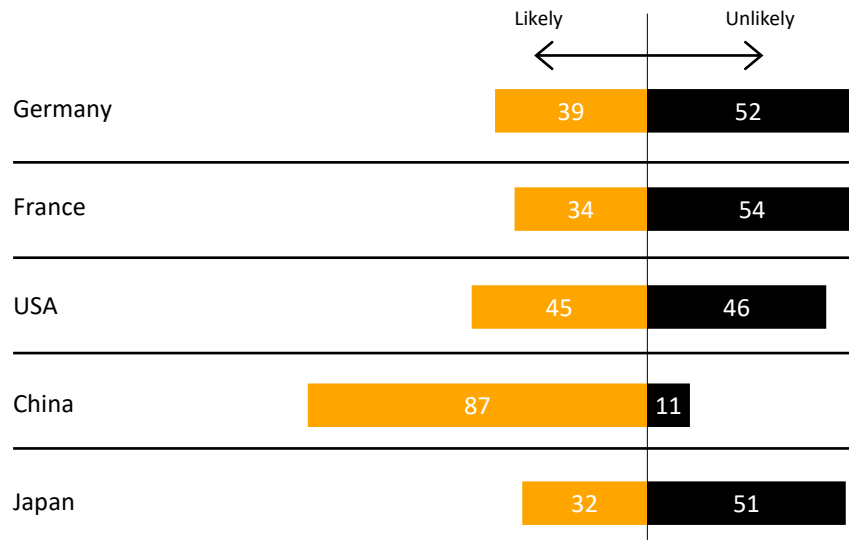
Only in China has the share of electric mobility increased significantly.



Figures in percent. Difference to 100 percent: "Prefer not to say" or "Natural gas." Basis: car owners.

Intention to Buy an Electric Car: Only in China Is There a Clear Majority

How likely is it that your next car will be electric?



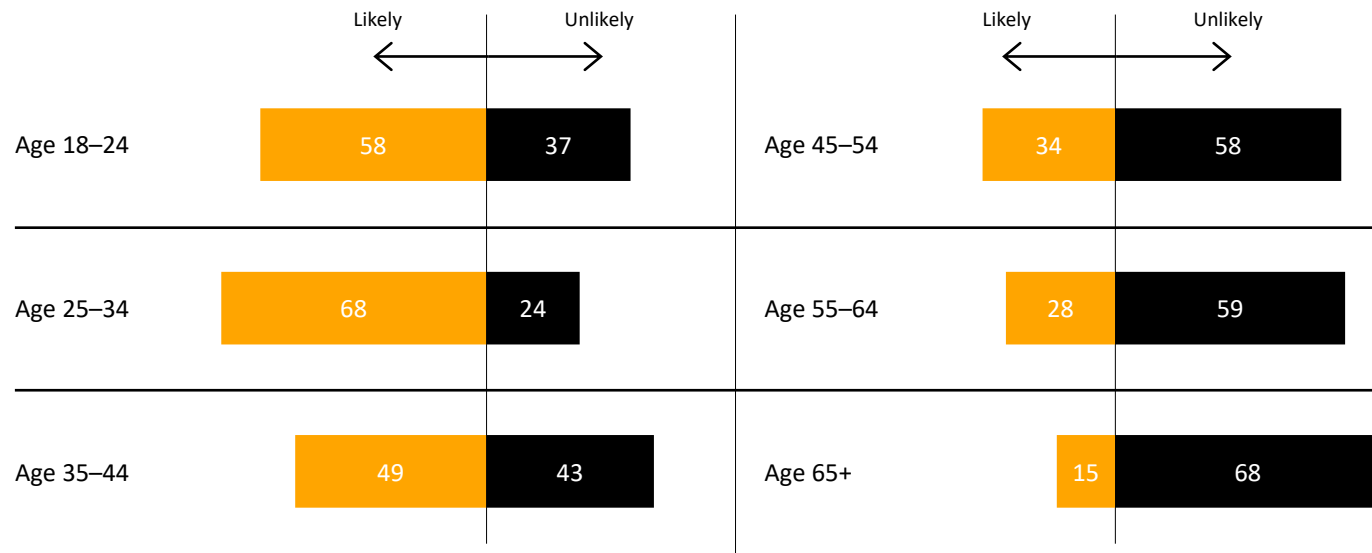
In other countries, there is still much greater skepticism toward electric mobility.

Figures in percent. Difference to 100 percent: "Prefer not to say" or "I don't want to buy another car." Basis: car owners who do not own an electric car.

There Is a Preference for Electric Mobility Among Younger People

Germany

How likely is it that your next car will be electric?



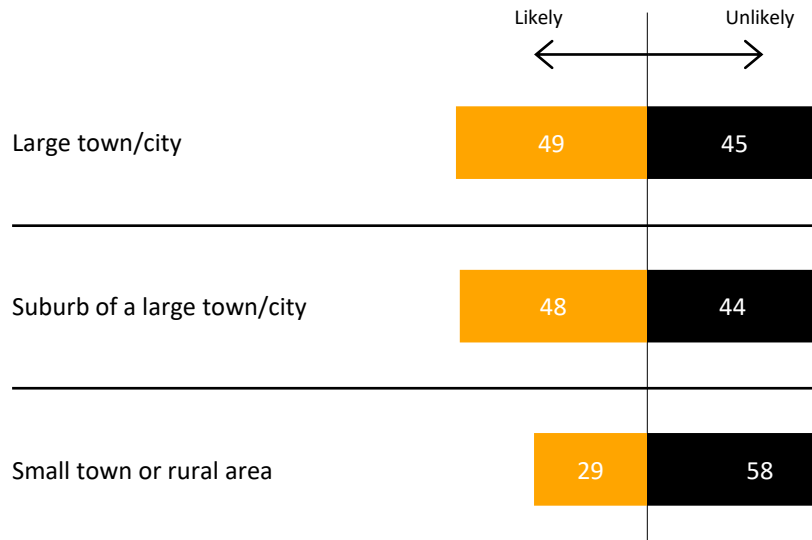
Among under 35-year-olds, an electric car is an option for more than half of respondents.

Figures in percent. Difference to 100 percent: "Prefer not to say" or "I don't want to buy another car." Basis: Germany, car owners who do not own an electric car.

Regional Differences in the Acceptance of Electric Cars

Germany

How likely is it that your next car will be electric?



In large cities and their surrounding areas, almost half of those surveyed would consider buying an electric car – compared with less than a third in rural areas.

Figures in percent. Difference to 100 percent: “Prefer not to say” or “I don’t want to buy another car.” Basis: Germany, car owners who do not own an electric car.

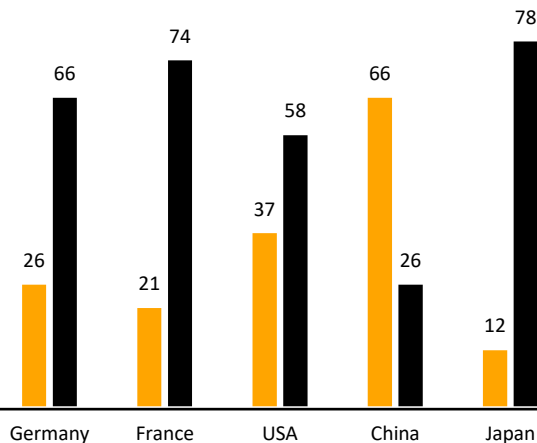
Costs an Important Factor in Switch to Electric Mobility

Do you agree with this statement?

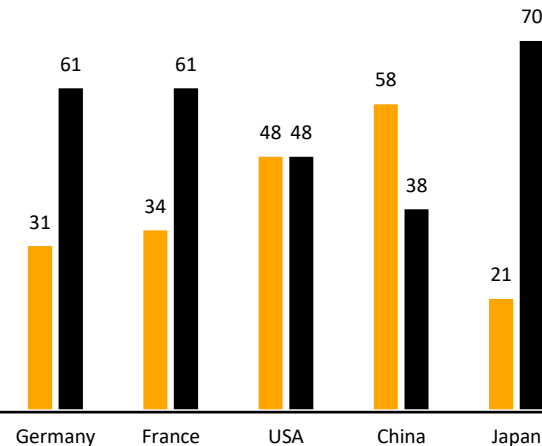
Yes, I tend to agree

No, I tend to disagree

I would be willing to buy an electric car even without government subsidies.



I feel well informed about the costs of using an electric car.



Figures in percent. Difference to 100 percent: "Prefer not to say."

Reservations About Electric Mobility

I'm not buying an electric car because...

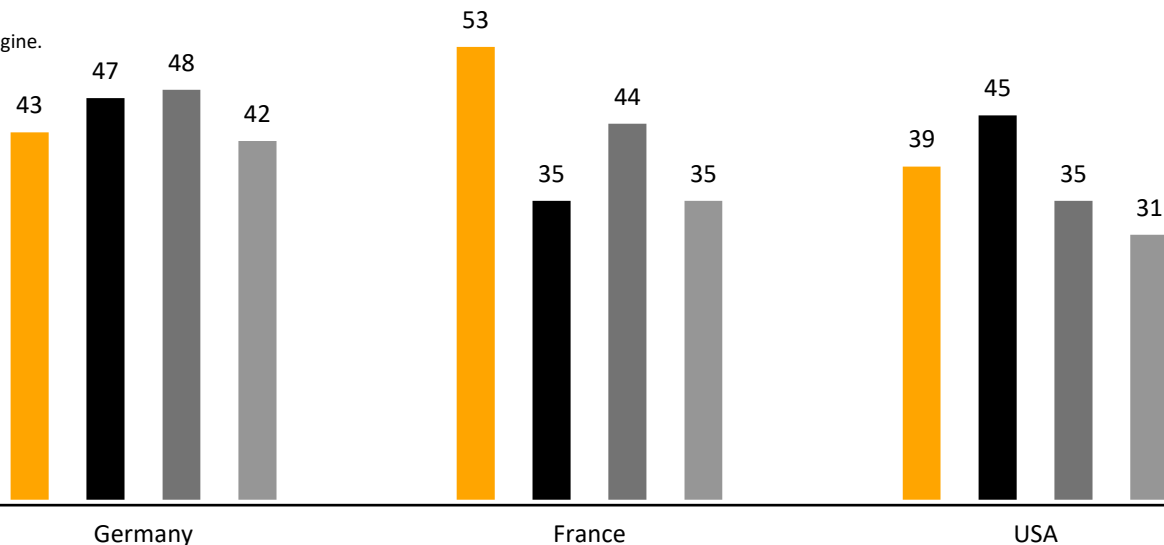
...it is more expensive than a car with an internal combustion engine.

...there are not enough charging stations.

...you can only travel longer distances if you plan charging stops in advance.

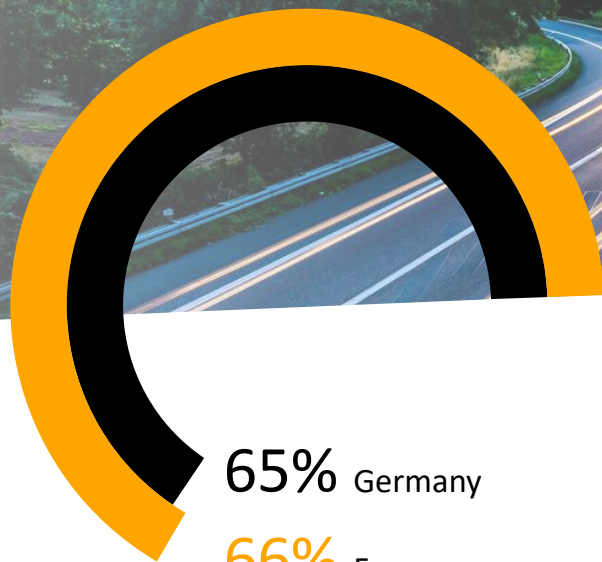
...I am not convinced that electric vehicles provide a solution to environmental problems.

More than 60 percent of German and French respondents say they feel sufficiently informed about the costs of using an electric car.



Figures in percent. Basis: respondents who do not own an electric car and refuse to buy one. Multiple answers possible.

Most People Are Against Banning Combustion Engines



65% Germany

66% France

A major reason is their concern about rising mobility costs: almost three quarters of Germans fear this.

Hybrid Cars as a Bridging Technology

Germany



48%

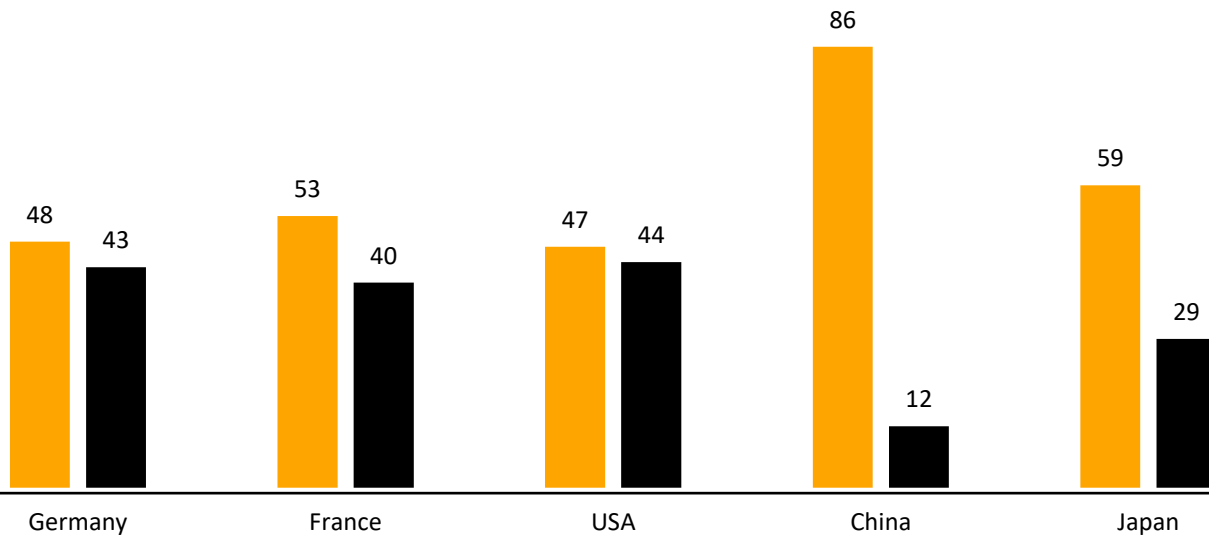
of respondents in Germany who do not drive an electric car or cannot imagine buying one would probably buy a hybrid car next. In other countries, this share is roughly the same or even higher.

Hybrid as an Alternative

How likely is it that your next car will be a hybrid?

■ Likely

■ Unlikely



Figures in percent. Likely: total of the answers "Very likely" and "Quite likely." Unlikely: total of the answers "Very unlikely" and "Quite unlikely."
Difference to 100 percent: "Prefer not to say." Basis: respondents who do not own an electric car and do not want to buy one.

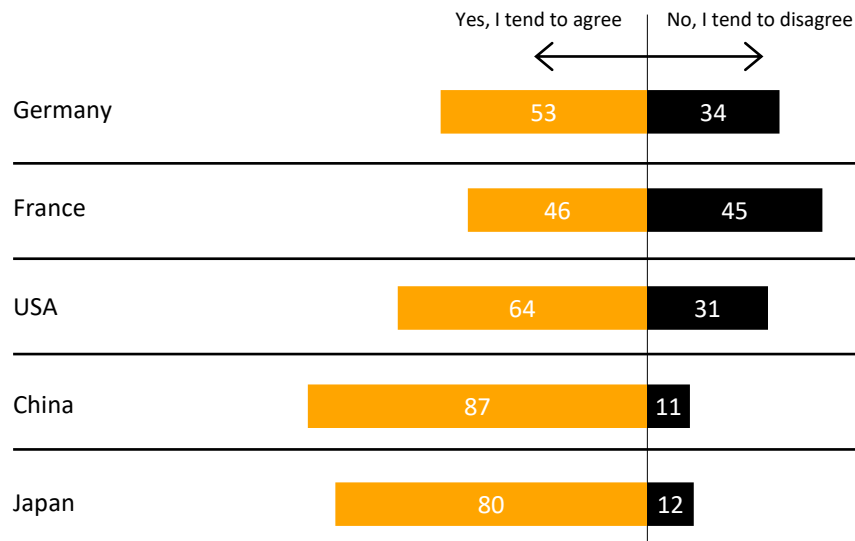
Assistance Systems and User Experience Are Highly Significant



Approval for Compulsory Safety Assistance Systems

Do you agree with the following statement?

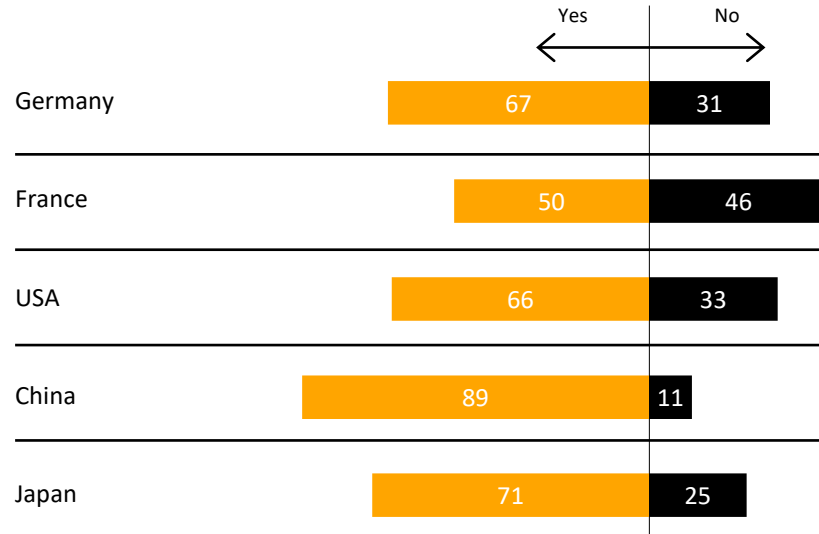
The latest safety technology in cars should be mandatory to make traffic even safer.



Figures in percent. Difference to 100 percent: "Prefer not to say."

Importance of Turn Assist Systems

Should your next car feature a turn assist system that alerts you to pedestrians or cyclists and brakes if necessary?



Figures in percent. Difference to 100 percent: "Prefer not to say." Yes: total of answers "Definitely" and "Quite likely".
No: total of answers "Maybe not" and "Definitely not."

When the Car Parks Itself



88%

of respondents in China would like to have automated car parking. In Germany, more than one in two want this.

Usability of Technology Is Very Important

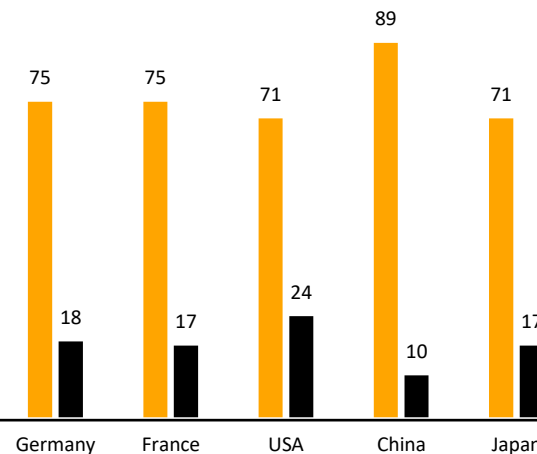
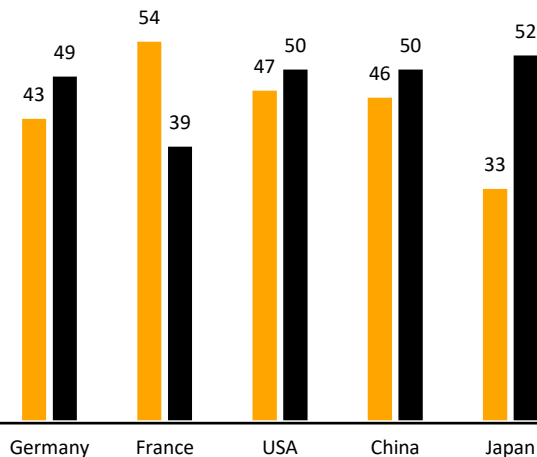
Do you agree with this statement?

Yes

No

I worry that I will not be able to operate the latest technology in the car.

It is essential that new technology in the car is intuitive to operate.



Figures in percent. Difference to 100 percent: "Prefer not to say."

Car Displays Should Ideally Be Large, Plain and Simple

Germany

How would you like a car display to be designed to show infotainment content (such as navigation, vehicle data, music)?

← Quite small Quite big →



← Quite plain With a lot of colors →



← Quite simple With a lot of functions →



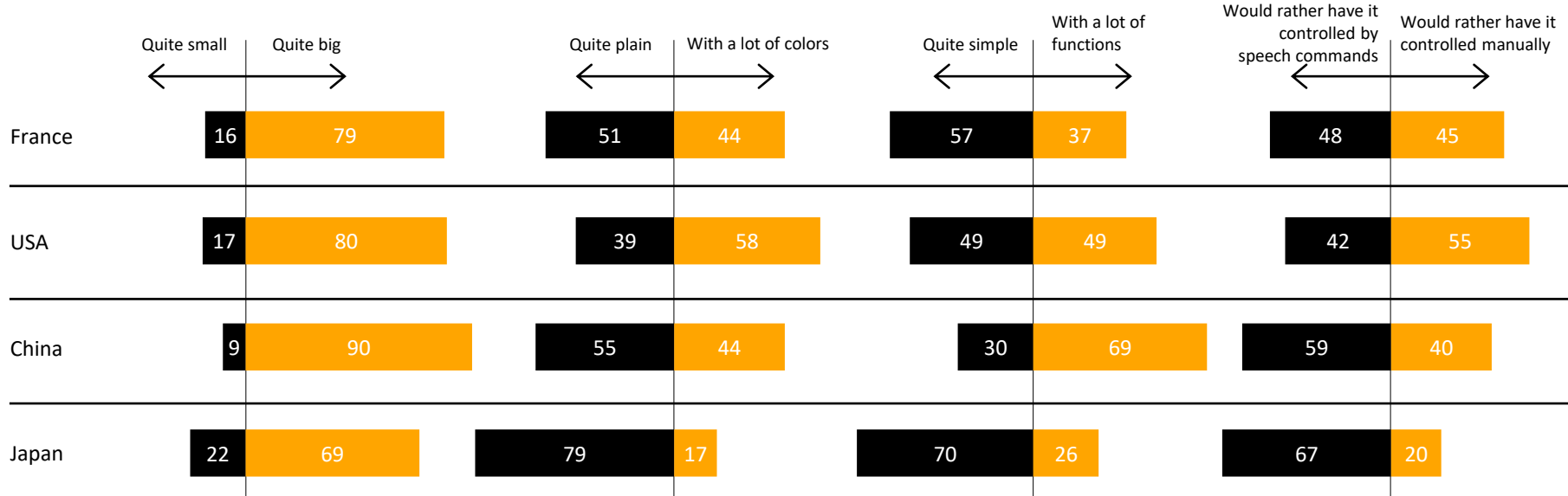
← Would rather have it controlled by speech commands Would rather have it controlled manually →



Figures in percent. Difference to 100 percent: "Prefer not to say."

Requirements for Car Displays

How would you like a car display to be designed to show infotainment content (such as navigation, vehicle data, music)?



Figures in percent. Difference to 100 percent: "Prefer not to say."

Automated Driving and the Role of AI in the Car



Automated Driving



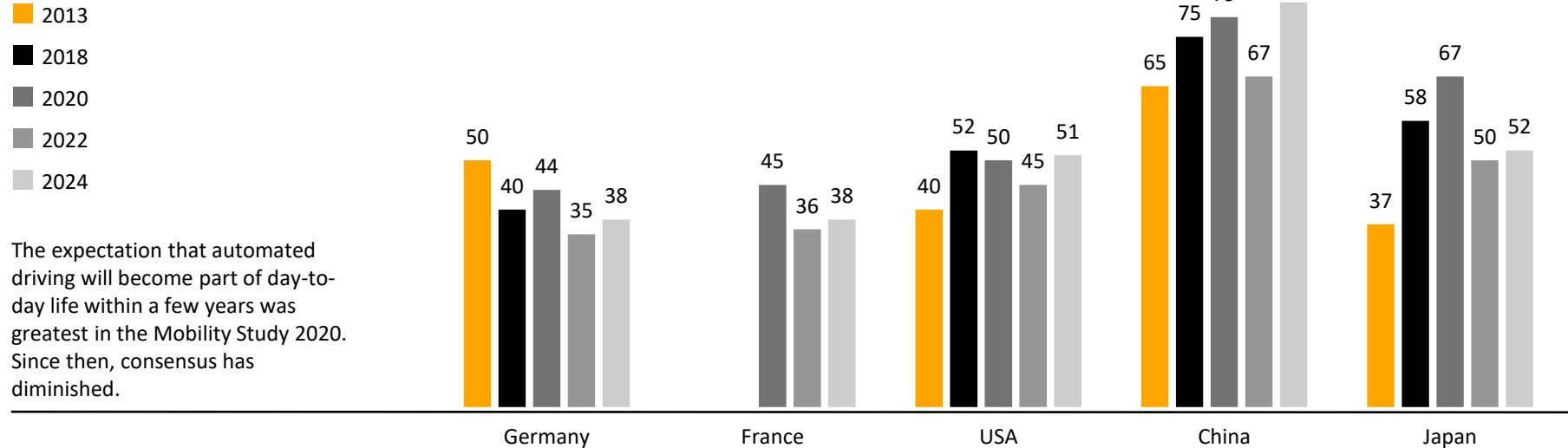
49% Germany

90% China

90 percent of respondents in China think automated driving is a useful development. In Germany, only one in two think the same.

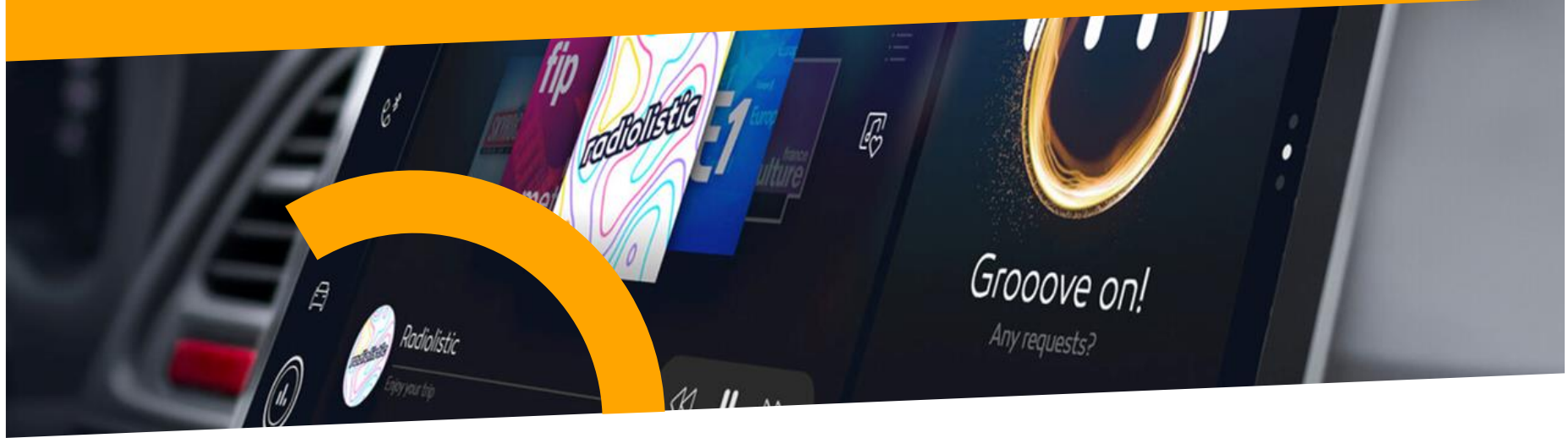
Automated Driving Soon to Become Part of Day-to-Day Life?

Consensus: automated driving will be part of day-to-day life in five years.



Figures in percent. Data for France has only been available since 2020.

AI as a Travel Companion



36%

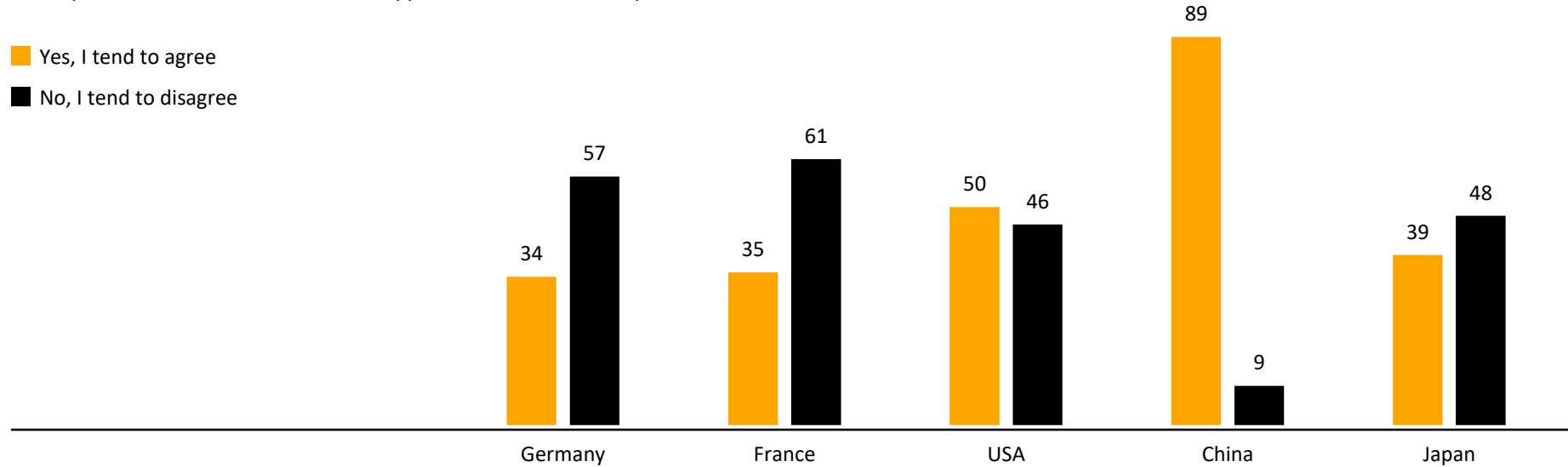
Long-distance drivers want assistance:
More than one in three Germans who mainly use their car for long distances of over 100 km would want an AI travel companion that can provide travel information during the trip or information on gas stations/charging stations, road tolls or traffic regulations abroad.

AI Assistants in Cars

It is important to me to have an AI voice application in the car that speaks to me.

■ Yes, I tend to agree

■ No, I tend to disagree



Figures in percent. Difference to 100 percent: "Prefer not to say."

The Changing Role of the Car among Younger People

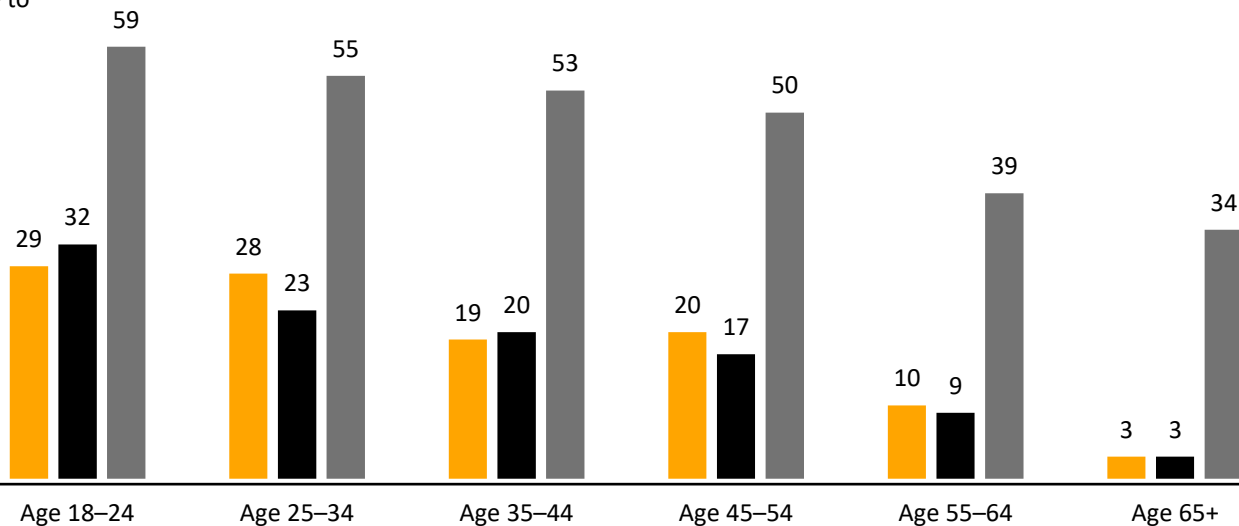


Many People Are Still Unsure About the Benefits of Autonomous Cars

For the cars of the future (that drive completely on their own), which activities would you most like to use the interior for?

- Sleeping
- Watching films/gaming
- Listening to music

A large number of young people in Germany are open to non-driving activities in autonomous cars. Overall, however, only a minority can imagine carrying out non-driving activities.



Figures in percent. Basis: Germany.

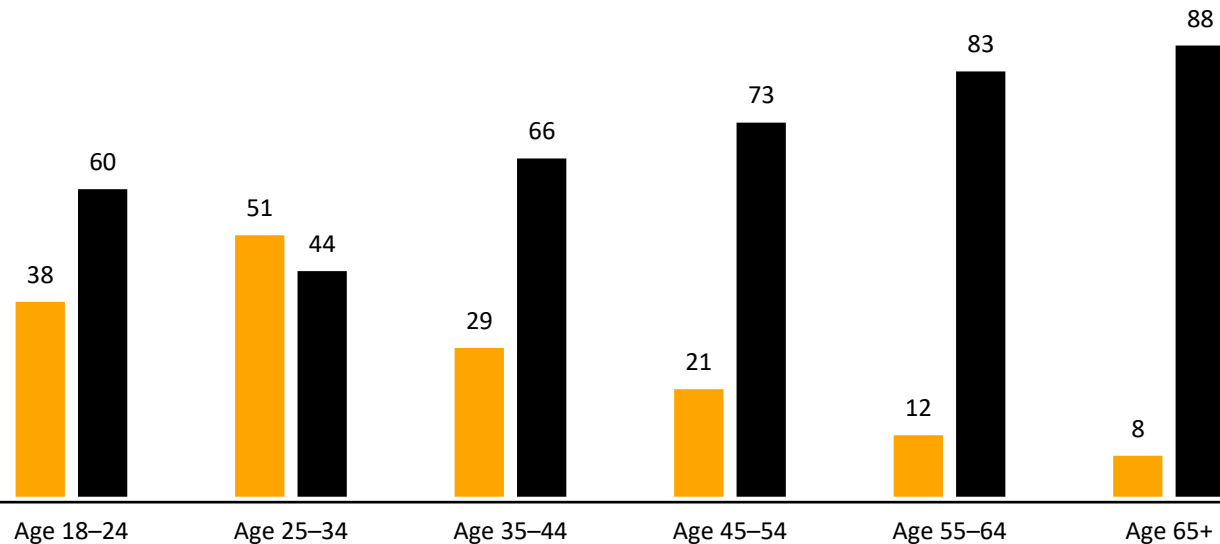
The Car as a Place of Retreat

Germany

Which of the following two statements related to cars of the future would you tend to agree with?

It is important for me that a car is not only a safe means of transport but also a space for retreat, entertainment and work so that the time spent traveling can be put to good use.

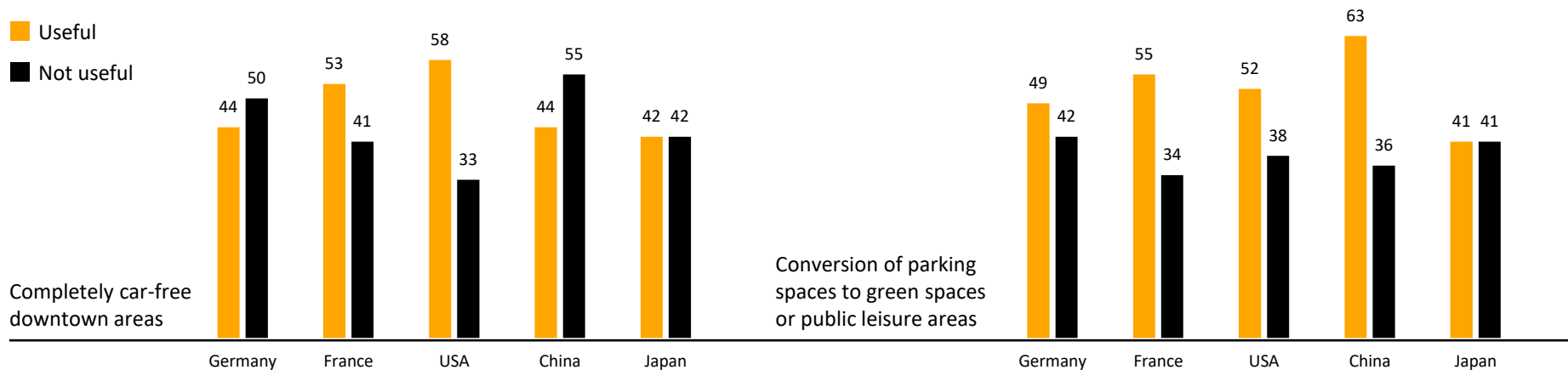
First and foremost, a car has to get me safely to my destination.



Figures in percent. Basis: Germany.

Ideas About Urban Mobility: How Much Car Use Makes Sense?

Various approaches exist for making downtown traffic calm and pleasant.
For each, please state how useful you find the following approaches.



Figures in percent. Difference to 100 percent: "Prefer not to say."

