





People, Cars and Mobility after the Pandemic

# EUROPEAN AUTOMOTIVE CONSUMER RESEARCH

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01 How has COVID-19 changed people's relationship with cars and driving?

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02 How have mindsets and behaviours around mobility evolved since the pandemic?

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03 What has changed in attitudes towards future of mobility & sustainability?

# Putting people into the center.

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*Countries*

Germany + Spain +  
UK + Italy + France

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25

Qualitative  
interviews

- Owners who bought a car in the last 6 months
  - Owners/Non-owners who are planning to buy a car
  - Mix of suburban, urban & rural
  - Mix of ages, socio economic background & experiences with C.A.S.E.
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2K

Quantitative  
total sample size

- Adults between 18 and 65 years
- Owners of a car, or that use it at least once a month
- No restrictions on gender, income, or other socio-demographic characteristics

# A deepened relationship with the car.



The new sense of fragility has added the dimension of health safety to mobility attitudes and behaviours.

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Risk-evasion as the new dimension in the mobility equation.

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The car has become a cocooning space for people to escape from the restrictions imposed by the pandemic.

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The need for self-care forms a new emotional relationship with the car.

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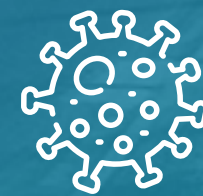
COVID-19 has created a tension between the benefits of car ownership and concerns about environmental impact.

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EVs are seen by many as the best current solution for the future.

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# How has COVID-19 changed people's relationship with cars and mobility?



# A shift in mobility mindsets adding the notion of health & safety.

## Before COVID-19

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I need to BE comfortable

I want to AVOID risks

I do it because I ENJOY it

I need to plan AHEAD

I need to spend MONEY wisely

Our FUTURE is important

COMFORT SEEKERS

RISK EVADERS

JOY MAKERS

PLANNERS

PENNY PUSHERS

HUMANITARIANS

## Since COVID-19

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I need to FEEL comfortable

I want to MINIMIZE travel

I do it because I NEED it

I need to plan AROUND

I seek a cost/safety TRADE-OFF

I need to REDEEM my guilt

# COVID-19 disrupted long-established mobility habits: less car usage and a wider mix of modes of transport.



Have changed their mix of transportation, either by diversifying or simplifying it.

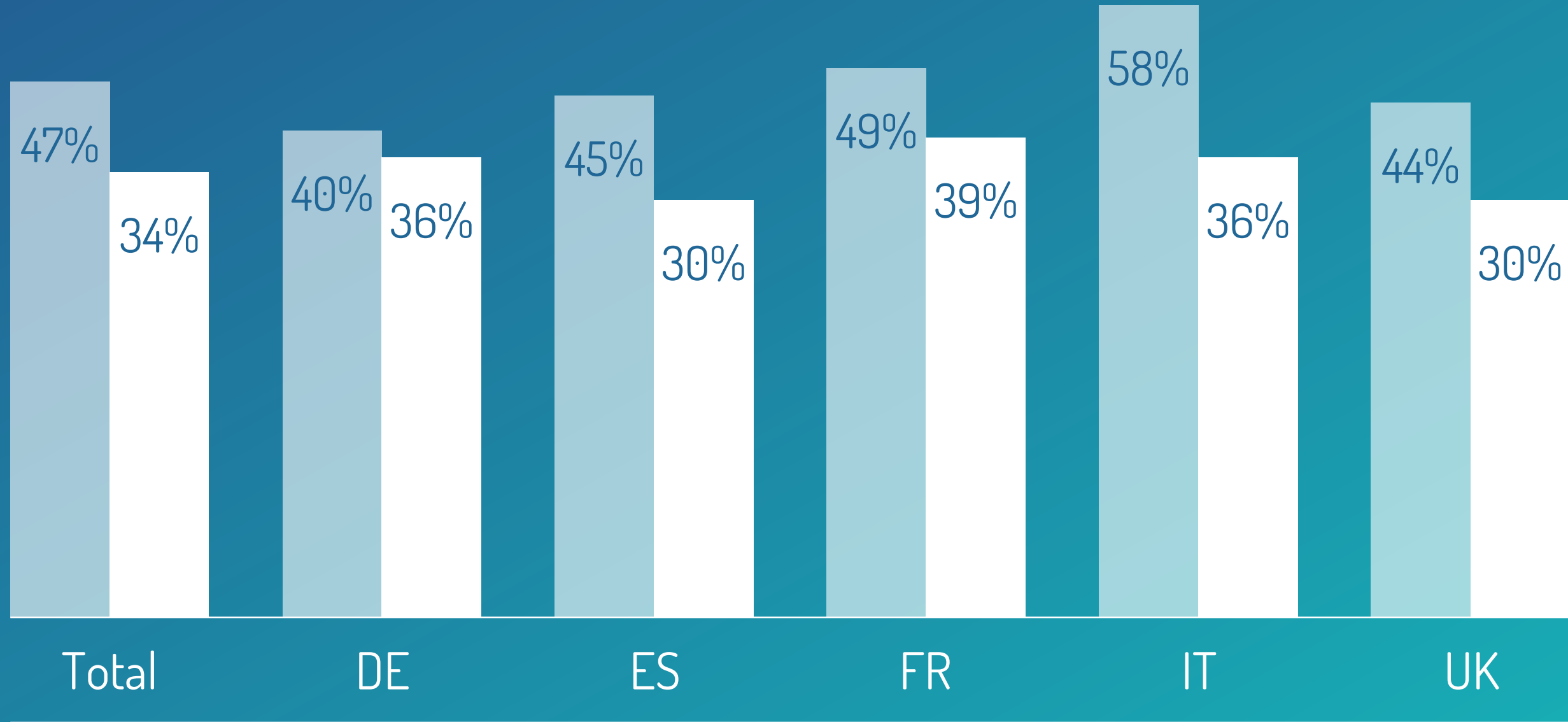
▲ Spain · 57%

▼ Germany · 32%

% who drove daily

● Before COVID-19

● During COVID-19





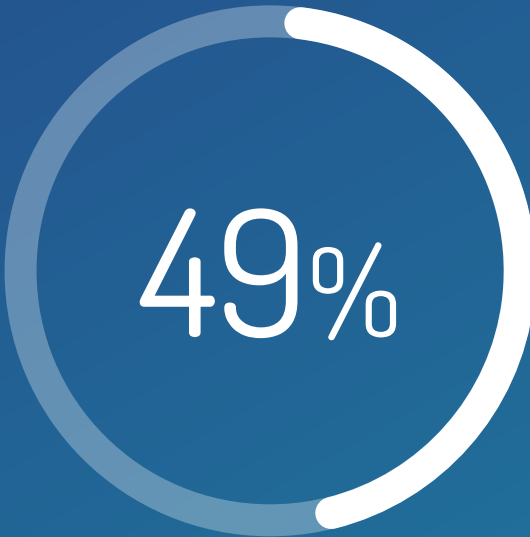
# The car has become a cocooning space providing physical and mental comfort.



Became more aware of the importance of maintaining good overall health.

▲ Spain · 75%

▼ Germany · 57%



Said that their mental health suffered during the pandemic.

▲ Spain, France · 52%

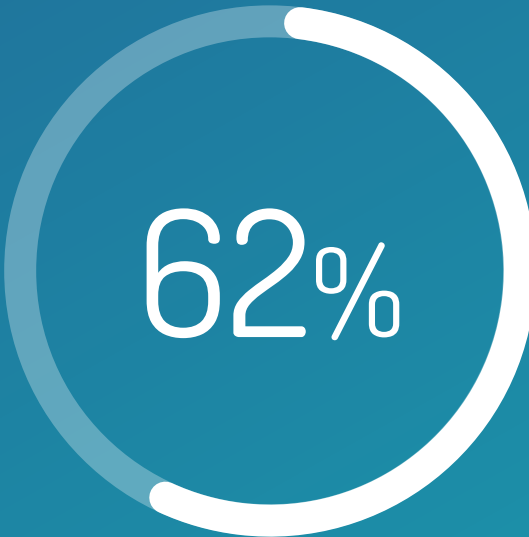
▼ Germany · 40%



Gained peace of mind through everyday access to the car.

▲ France · 77%

▼ Spain · 63%



Worried less about hygiene and safety when being in the car.

▲ UK · 67%

▼ Germany · 58%

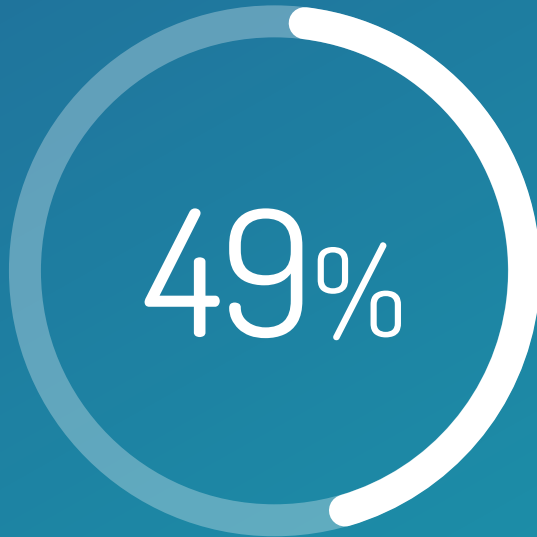
As mobility is limited, it has taken on an element of escapism.



Said that driving made them feel free at least for a little while.

▲ Spain · 70% | UK · 68%

▼ Germany · 52%



Said that driving allowed them to escape mentally from the daily challenges.

▲ Spain · 59% | UK · 60%

▼ Germany · 40%

New self-care habits are emerging and mobility is one of them.  
People want to keep these habits post-pandemic.

50%



Have increased walking.  
22% of them did so significantly.

55%

Did so because it is  
the healthier option.

33%



Have increased the use  
of their personal bicycle.

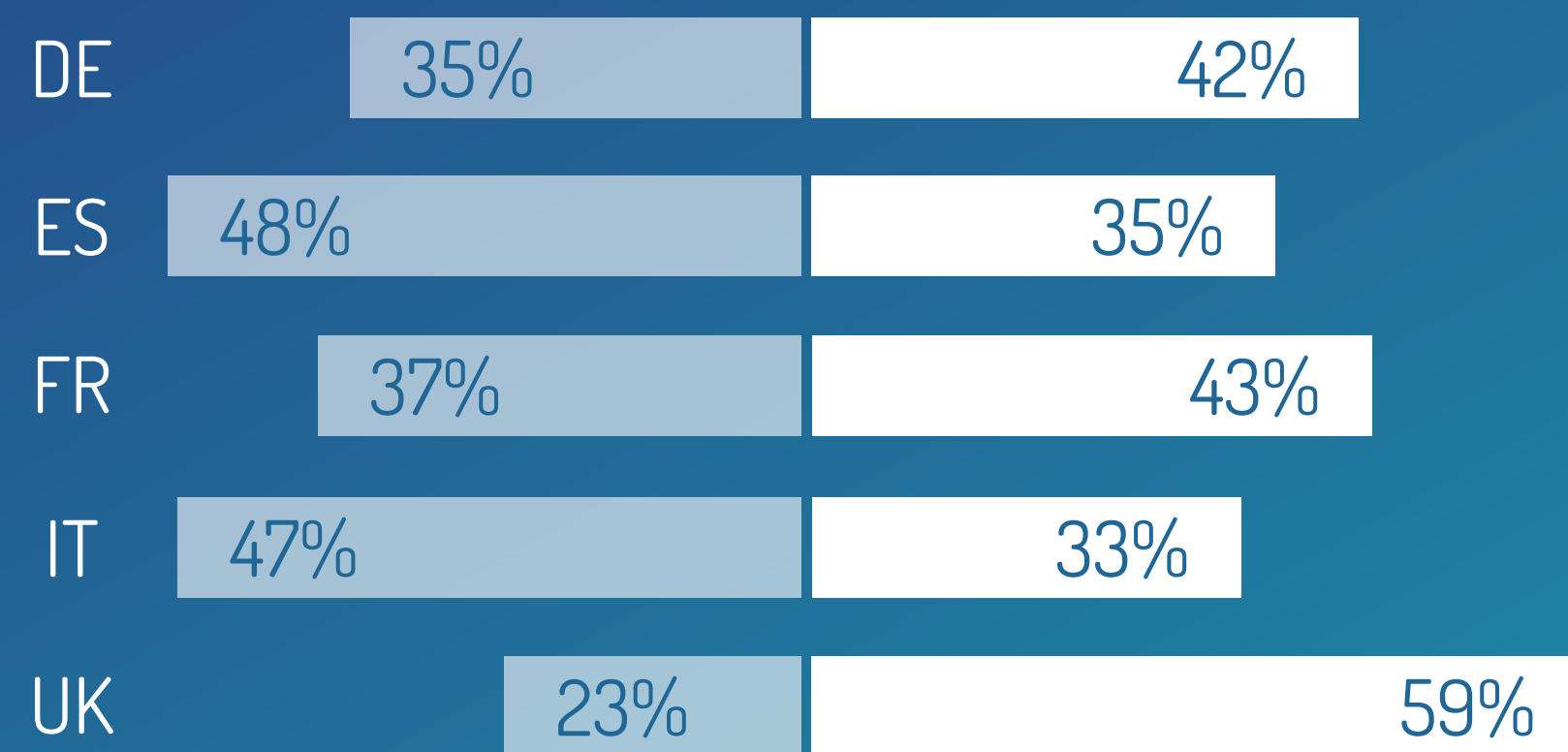
40%

Did so because it is  
the healthier option.

# The dust is yet to settle on new transportation habits.

*After the pandemic,*

I WANT to use different types of transportation in the same way as...

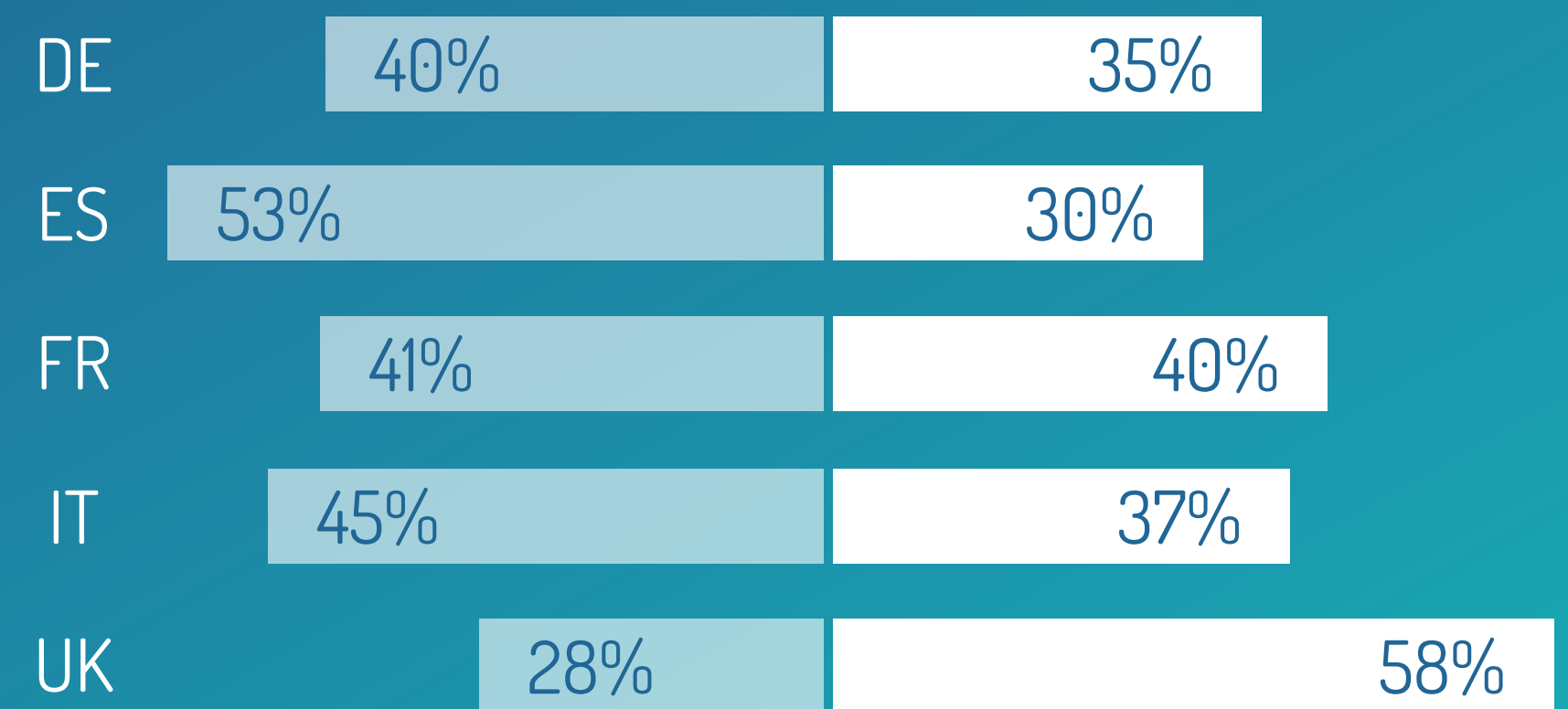


● Before COVID-19

● During COVID-19

*After the pandemic,*

I AM MORE LIKELY to use different types of transportation in the same way as...



So, what will remain?

Aside from personal choice, policies by companies and governments will influence which behaviour will stick.

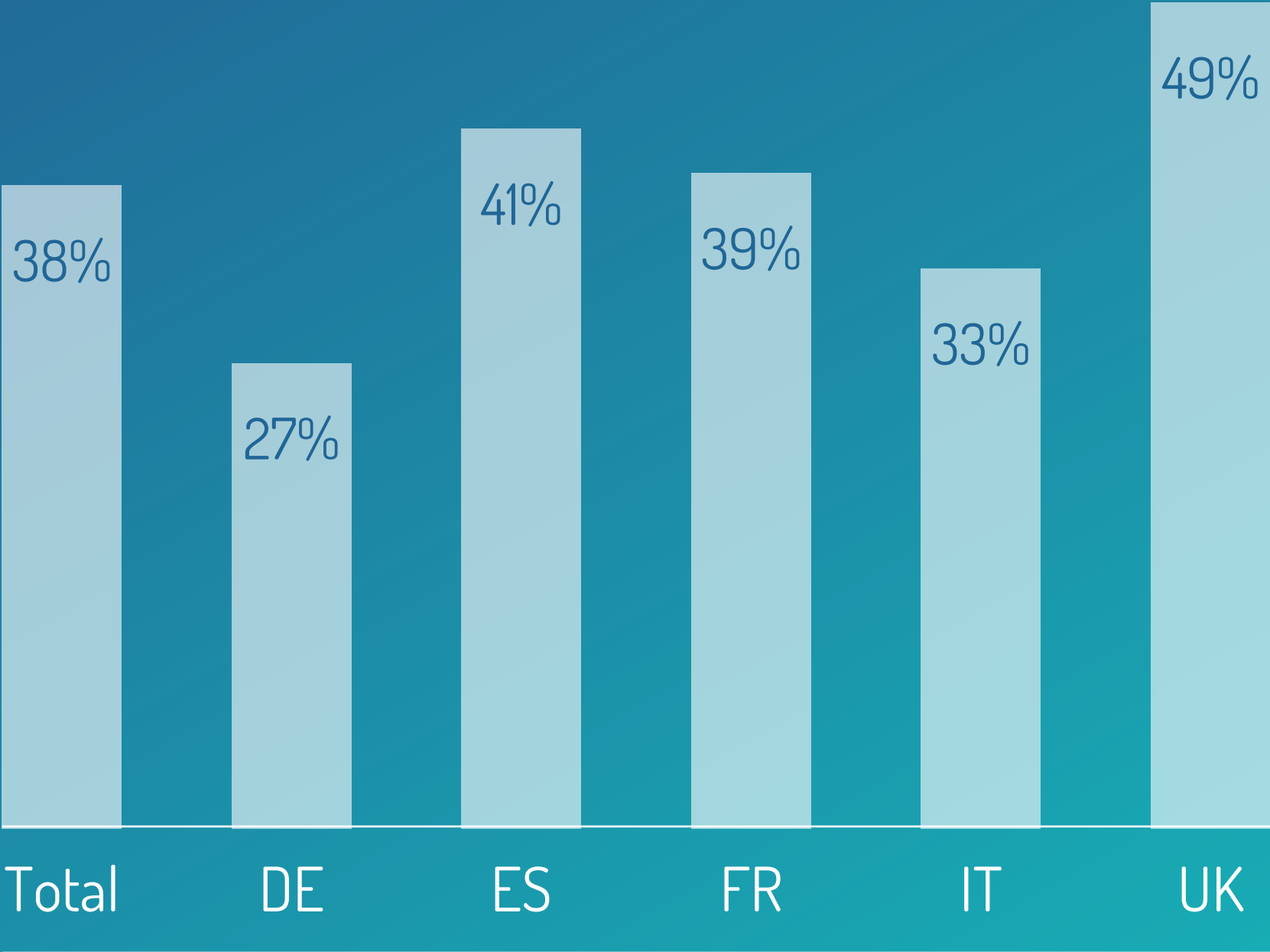
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So, what will remain?

The push to remote working let many to start to think about a life outside the big cities.

During the pandemic, I started thinking about moving out of the city and living in a suburban/rural area.



# So...do people still want to own cars in 2021?

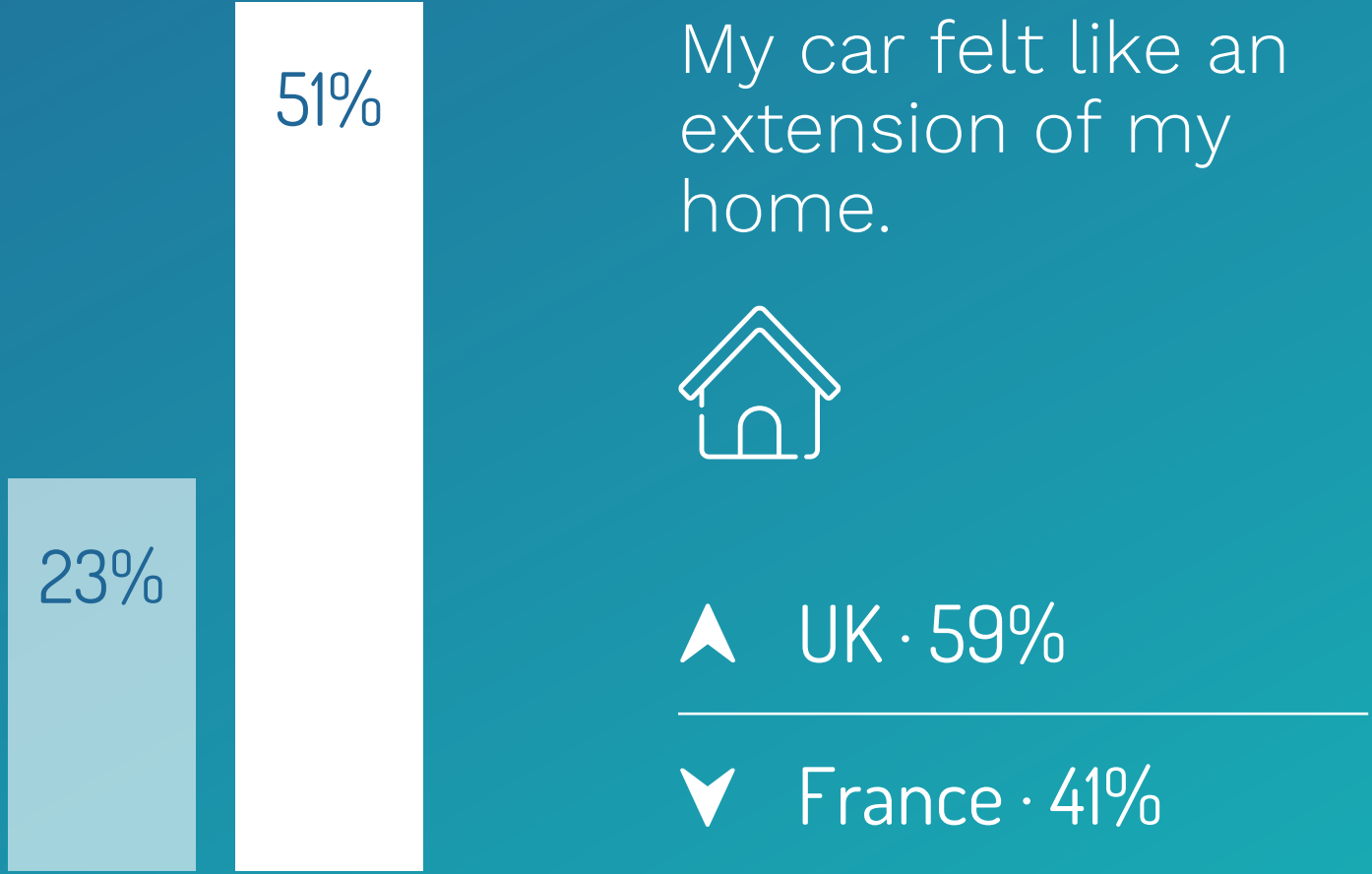
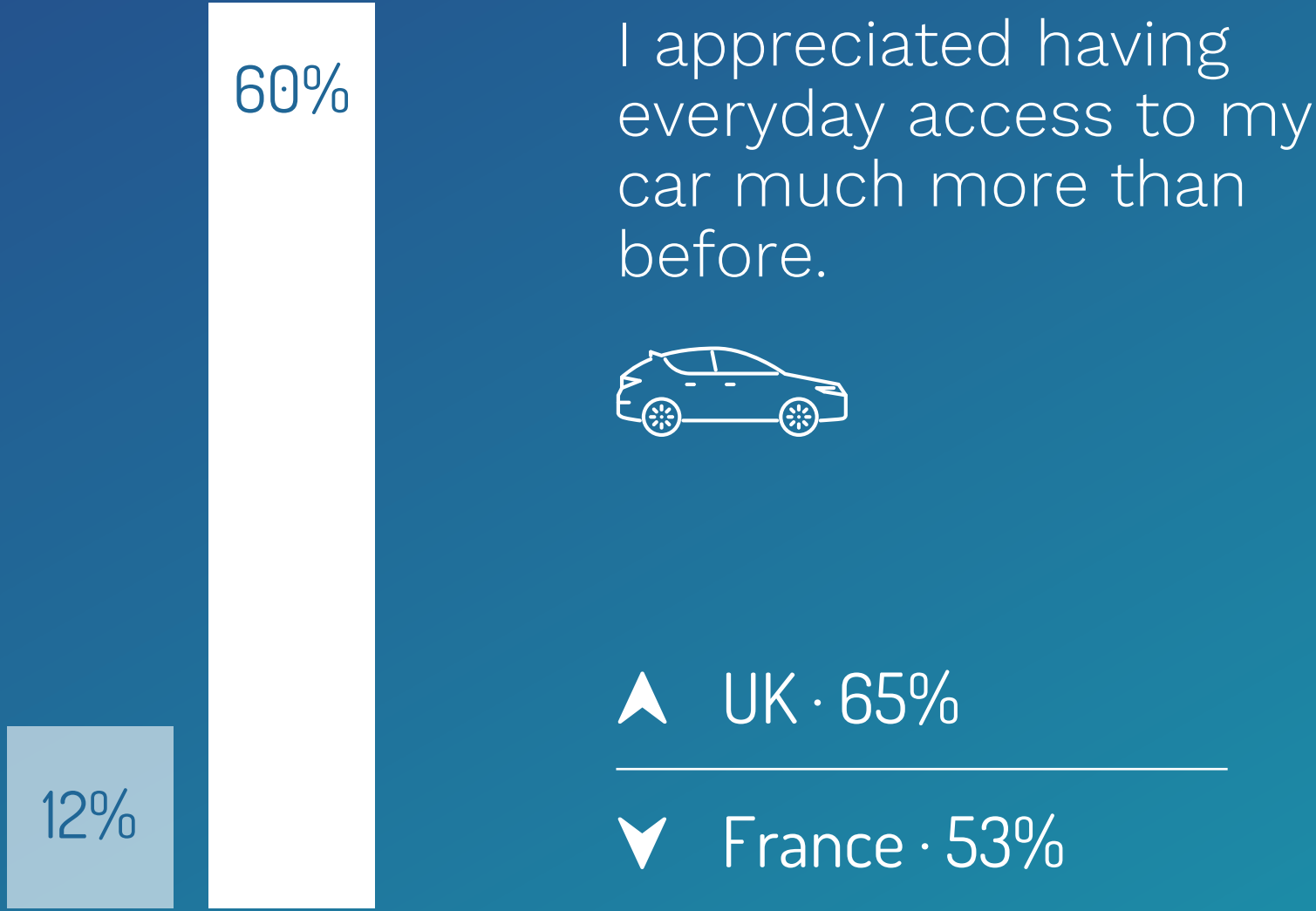
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# The pandemic has inspired a re-evaluation the car and a high appreciation of having independence.

*During the pandemic:*

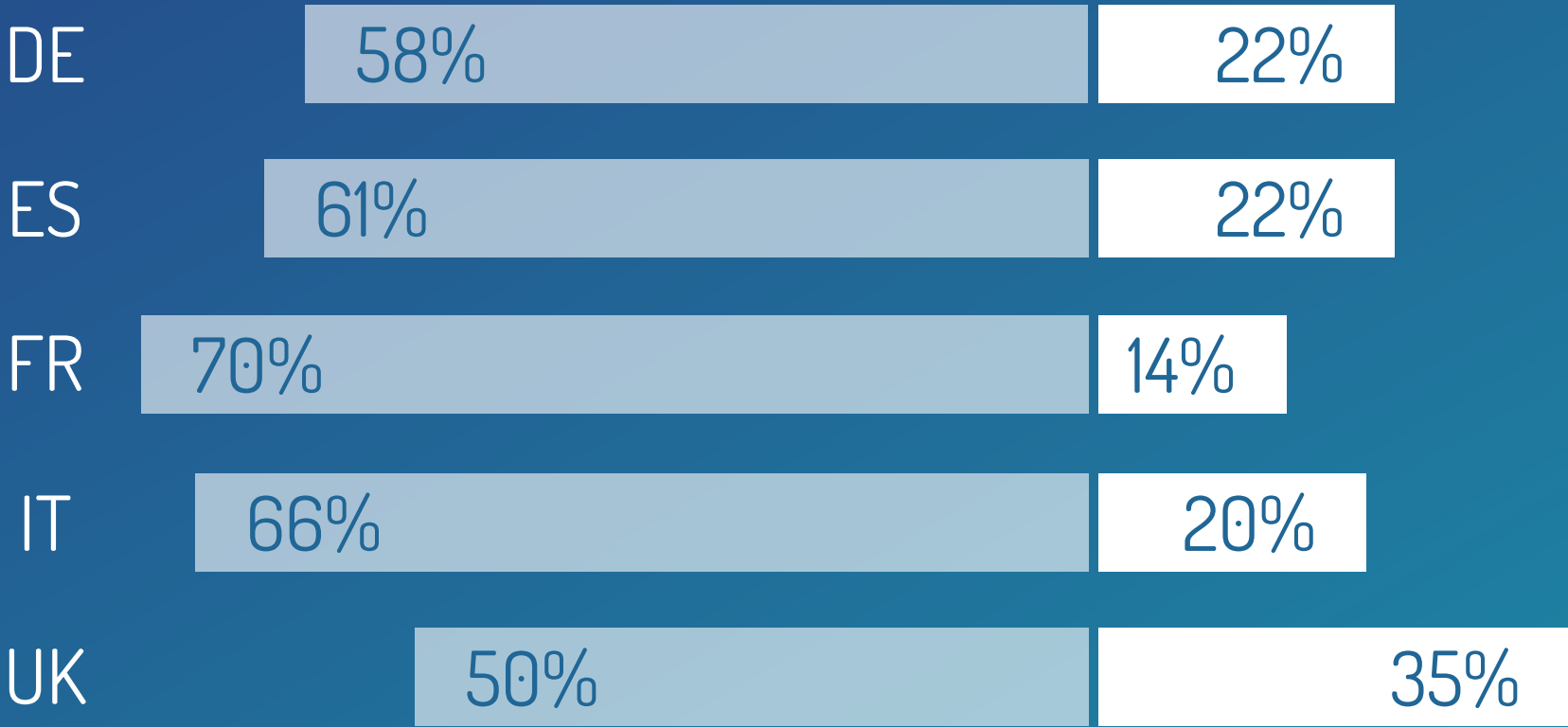
● Disagree ● Agree





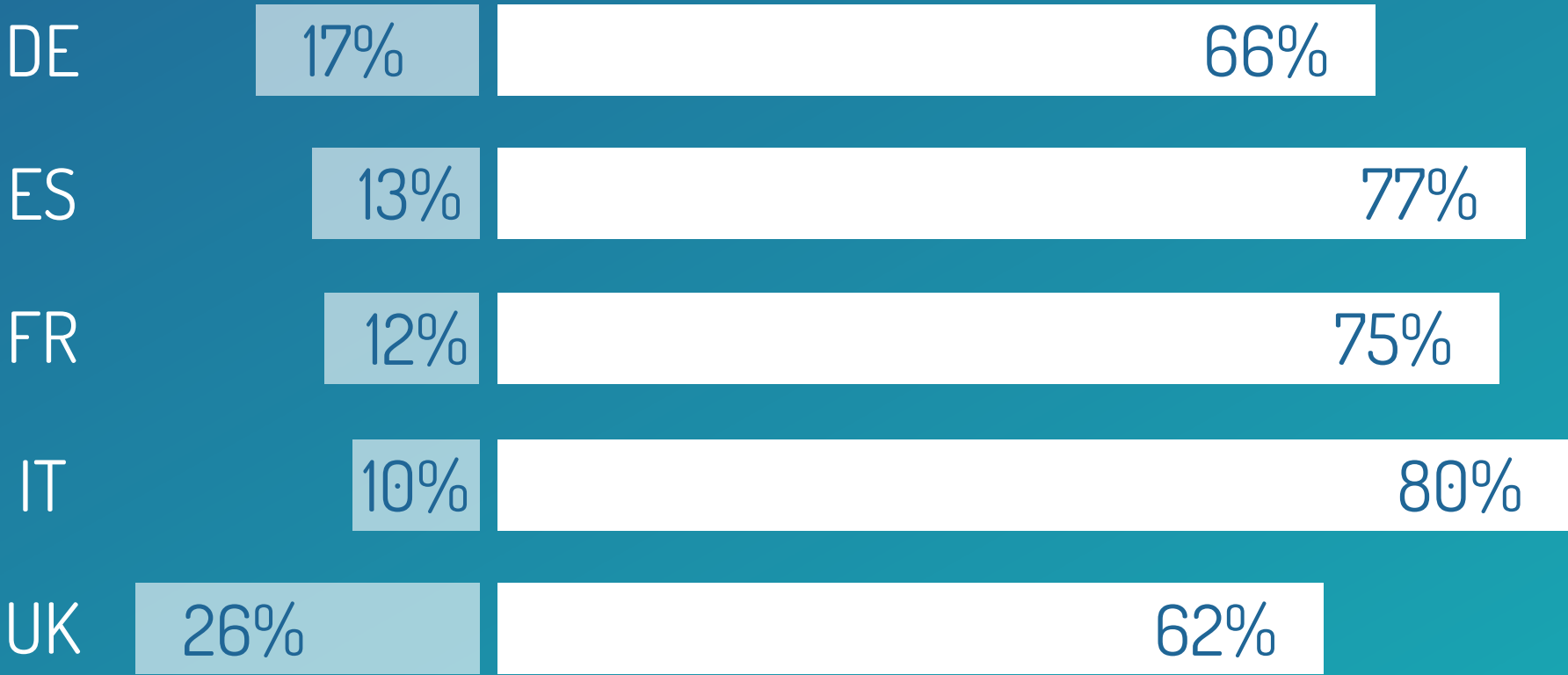
# The idea of owning a car has been reinforced during the pandemic.

During the pandemic I realized that I don't really need a car.



● Disagree ● Agree

Because of COVID-19, I prefer...



● Not owning my own car ● Owning my own car

47%

Of those who agree that during the pandemic they realised they don't need a car still say they prefer owning their own car.



People know about alternatives to ownership, but find it hard to give up the idea.



Said they cannot imagine their life without having a car.

▲ France · 75%

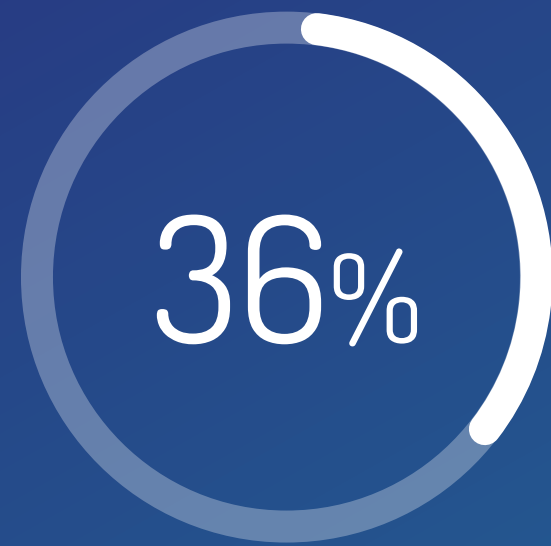
▼ Spain · 65%



Said they are interested in personally using a car subscription service.

▲ Spain · 53%

▼ Germany · 33%



Say they are comfortable purchasing a car completely online, without assistance from a dealership.

▲ UK · 44%

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▼ Germany · 31%

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Of these said they prefer being able to get advice from a person at the dealership when purchasing a car.

▲ Spain · 69%

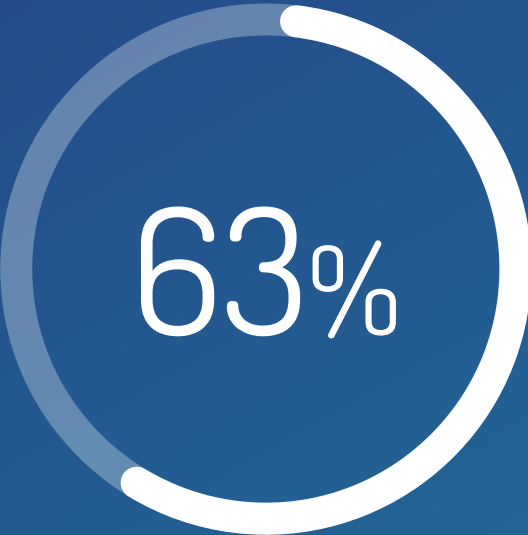
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▼ Germany · 39%

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Consumers are more open to buying a car online, but human support remains key.

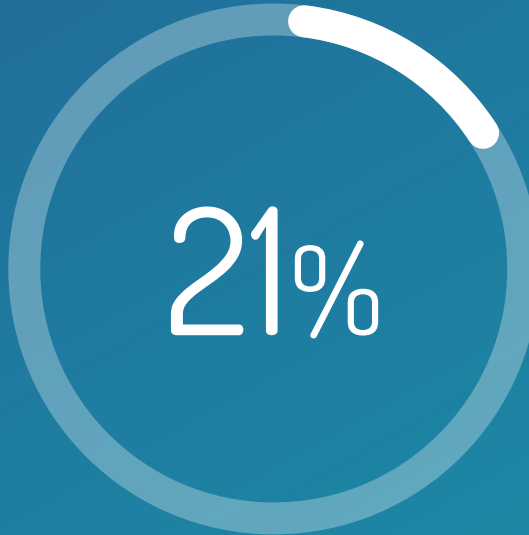
The pandemic accentuated a tension between the need for the car as a safe space and the increased awareness of environmental costs.



Very much enjoyed driving during the pandemic.

▲ UK · 76%

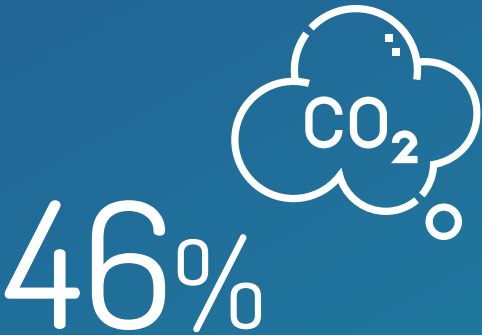
▼ Germany · 49%



Felt guilty when driving during the pandemic.

▲ UK · 37%

▼ France · 11%



Said that the pandemic made them more aware of the environmental impact of combustion cars.



Have given a serious thought to use the car less because of the environmental impact.

# The appeal of electric and shared cars as “the solution to it all” varies across Europe

52%



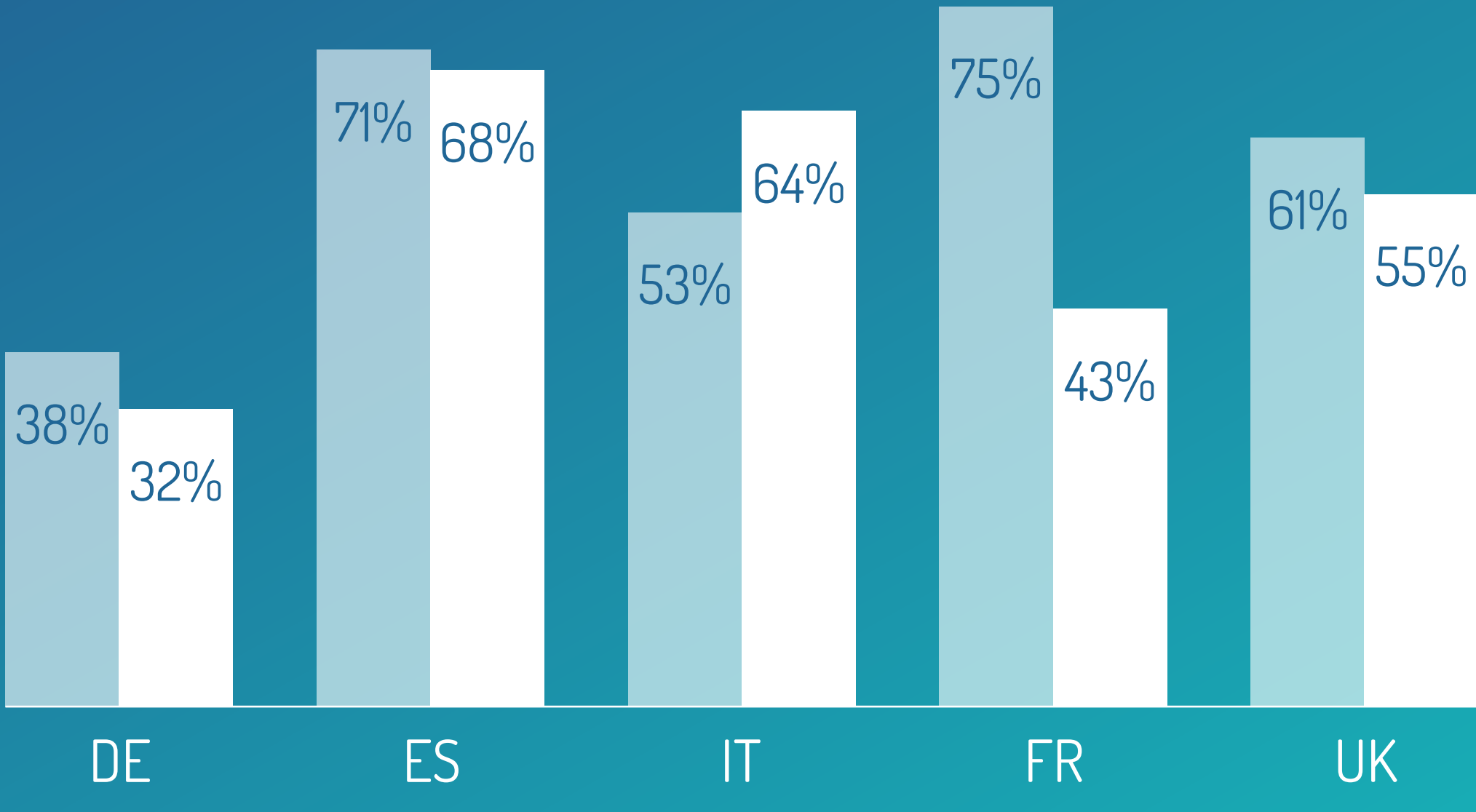
Agreed an electric car is the best solution to reduce the environmental impact of their driving.

60%



Agree that car sharing helps limit the impact of combustion cars on the environment.

- Car sharing helps limit the impact of combustion cars on the environment.
- Having an electric car is the best solution to reduce the environmental impact of my driving.



# Electric cars still retain an aura of luxury but one which almost half aspire to in the short to mid term

## 56%

See having an electric car as a luxury

▲ France · 67%      ▼ Germany · 46%



Half of those plan to buy an EV in the future

## 44%

Plan to buy an electric car in the future

▲ Spain · 54%      ▼ Germany · 27%



45 % Plan to buy an EV in the next 3 years

▲ Germany · 51%      ▼ Italy · 39%

# Key Takeaways

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Mobility is part of an increased awareness to keep mental & physical health.

People are more open to digital tools during the car purchase but want human assistance in key moments.

The EV as the aspirational car of the future of mobility.

Working remotely and leaving the city might increase the use of cars.

The EV is not regarded as the only solution to solve the sustainability problem.

The car as the safe space in insecure times.





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[Automotiveinnovationlab.com](https://Automotiveinnovationlab.com)