

# SWISS MOBILITY MONITOR 2023

## – SELECTED INSIGHTS –

The Swiss Mobility Monitor 2023, a study conducted by the Institute of Marketing and Analytics (University of Lucerne) and the Institute for Mobility (University of St. Gallen) is the second edition of a representative study across Switzerland, which provides insight into how innovative mobility solutions are currently used and perceived. These innovative mobility solutions include electromobility, car-sharing and digital mobility purchasing. The study results provide a detailed insight into the mobility requirements of people living in Switzerland.

This year's publication focuses on generation-specific mobility preferences. In addition, for the second time, the study report contains comprehensive findings on the use of innovative mobility solutions. To get a copy of the study report, go to the University of Lucerne website ([link](#)). A selection of insights from the study report is provided below:

### Part 1 – Generation Z's openness towards new mobility solutions

#### 1. People's attachment to their own car remains strong

Generation Z feels a significantly greater sense of ownership towards car-sharing and cars using a subscription-based model than any other age group. However, Generation Z also attaches much more importance to having their own car than to car-sharing, car subscription models and leasing. Study participants were asked about four forms of car ownership: (1) owning your own car, (2) leasing a car, (3) car subscription and (4) car-sharing.

#### 2. People's own car remains a source of identity

More than any other age group, Generation Z perceives using a car in any form as an important factor in shaping their self-image. And yet, across all generations, owning their own car still influences their personal identity most.

#### 3. Perceived loss of control without car ownership

People belonging to older generations (e.g. baby boomers) feel a significantly greater loss of control when car-sharing than Generation Z. When it comes to owning their own car, all generations have a similar perceived sense of control.

#### 4. Young people have the highest hygiene standards when it comes to cars

While Generation Z is more open to using car-subscription models and car-sharing, they also demand a higher standard of hygiene when it comes to these models than they do for their own car or a leased car. Generation Z also has the highest hygiene standards of all generations when it comes to subscription-based cars and car-sharing.

#### 5. Not all automotive innovations appeal to Generation Z

«Pay-as-you-drive» insurance models are gaining in popularity. For this type of car insurance, the insurance rate is calculated on the basis of driving habits and kilometres driven. Here, Generation X and baby boomers are more innovative than Generations Y & Z. They demonstrate more trust in the new insurance model and indicate a higher willingness to adapt.

### Part 2 – Further insights into the use of innovative mobility solutions

#### 6. Are we returning to «pre-Covid mobility»?

The number of people walking to work is lower in 2023 (29%) than in the previous year (35%). At the same time, using public transport to commute to work is becoming more popular again. For example, 34% of commuters use the train to get to work (compared to 28% in the previous year) and 29% use the bus (compared to 23% in the previous year).

#### 7. Purchasing means of mobility online is gaining momentum

9% of respondents (compared to 7% in the previous year) said they had already bought a car online. For bicycles, the figure increased from 8% to 11% and the purchase of e-bikes online rose from 3% to 4%.

#### 8. Money isn't the only consideration when switching to an electric car

A lower purchase price is not really the most important factor when it comes to purchasing a car with an electric motor. A well-developed charging infrastructure and a longer range for electric cars are more important.

#### 9. The number of cars with a petrol engine is decreasing

The number of cars with a petrol engine fell from 64% to 61% compared to the previous year. The number of electric cars nearly doubled, increasing from 3% to 5%. The number of hybrid cars also increased slightly (from 6% to 7%).

#### 10. Car subscriptions aren't very common yet

2% of respondents have already used a car subscription. Car subscriptions are currently most popular with Generation Z and with people who don't own a car. Where people live (urban vs. rural area) has no significant impact on the preference for car subscriptions.

#### Sample demographics

- Average age 45.1 years old
- Gender 49.1% female  
50.5% male  
0.4% non-binary
- Language region 70.5% German  
23.8% French  
5.7% Italian

#### Study design

- LINK online panel from the three language regions of Switzerland
- Representative sample of 1'052 people in Switzerland
- Survey period: 30 January 2023 to 9 February 2023

### Detailed study report

These and many more insights can be found in the detailed study report on the Swiss Mobility Monitor 2023. Among other things, the results presented in the report provide insight into the adoption of mobility innovations. Detailed results on electromobility innovations, the sharing economy, car-subscription models, multi-modality, digital mobility purchasing, autonomous mobility as well as connected mobility and digital vehicle services are presented. The report also highlights a number of aspects underlying the issue of ownership and possession, as well as the perceived flexibility of different forms of mobility.

The report consistently applies the perspective of people living in Switzerland and applies segmentation at selected points based on demographics, generation and other characteristics (e.g. car ownership).

The detailed study report is part of the **Swiss Consumer Studies**. The «Selected Insights» and the complete study report are available at the following link:

[www.swissconsumerstudies.ch](http://www.swissconsumerstudies.ch)

For any questions about the study please contact: [swissconsumerstudies@unilu.ch](mailto:swissconsumerstudies@unilu.ch)

#### Citation

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