SWISS MOBILITY MONITOR 2024

SELECTED INSIGHTS: THE COST OF NEW MOBILITY

The Swiss Mobility Monitor 2024, a study conducted by the Institute of Marketing and Analytics (University of Lucerne) and the Institute for Mobility (University of St. Gallen) is the third edition of a representative study across Switzerland titled "The Cost of New Mobility". This edition provides insight into the status quo of the use and perception of innovative mobility solutions. These innovative mobility solutions include electromobility, sustainable mobility solutions and autonomous mobility. The study results also provide a detailed insight into the mobility requirements of the population living in Switzerland.

This year's publication focuses on the cost of new mobility. In addition, for the third time, the study report contains comprehensive findings on the use of innovative mobility solutions. To get the full study report, go to the University of Lucerne website (link). A selection of insights from the study report is provided below:

Part 1 – Autonomous mobility: great opportunities, high cost

1. As it stands, one third of those surveyed would not purchase an autonomous car

Currently, approximately one third of the people living in Switzerland cannot see themselves buying an autonomous car. Willingness to buy an autonomous car is very low, particularly in the lower price segment. In fact, it is even lower than the willingness to buy a non-autonomous car in the same price segment. In the upper price segment (over CHF 40,000), by contrast, the willingness to pay for autonomous and non-autonomous cars is more or less equal.

2. People living in Switzerland associate autonomous vehicles with a loss of control

Autonomous forms of mobility (whether a car, taxi or public transport) are associated with a greater loss of control than their non-autonomous counterparts. The Swiss are less concerned about a loss of control when it comes to autonomous public transport and fear a greater loss of control when it comes to their own autonomous cars and autonomous taxis.

3. Respondents would still use autonomous public transport

The motivation to use autonomous mobility largely depends on the form of mobility. Respondents are already demonstrating a greater willingness to use autonomous public transport, but are still more reluctant when it comes to using their own autonomous vehicle.

4. Autonomous mobility reduces sense of responsibility

People generally have a low sense of responsibility when travelling by taxi or public transport, regardless of whether the vehicle is autonomous or non-autonomous. By contrast, the Swiss feel most responsible for their vehicle when driving their own non-autonomous car. It's worth noting that the sense of responsibility decreases significantly when it comes to people driving their own autonomous car.

5. The use of autonomous mobility is still low, but is on the rise

The number of people in Switzerland who already use autonomous mobility remains small, but is quickly growing. Compared to 2022, usage has risen from just under two per cent to over three per cent of the Swiss population. Fully autonomous mobility, such as the SkyMetro at Zurich Airport, is currently only a reality in a handful of instances in Switzerland. Autonomous cars without drivers are still a long way off on the roads of Switzerland.

Part 2 – Sustainability: caught between ambition and reality

6. Sustainability needs to be affordable

When asked about the most important characteristics of environmentally friendly modes of transport, respondents ranked cost as the most important factor. Even when respondents are prepared to spend more money on environmentally friendly modes of transport, their initial expectation is that journeys would take less time and only later do they expect them to be more sustainable.

7. Respondents tend to perceive the prices for electric cars as unfair

Prices for electric cars tend to be viewed as unfair, while prices for trains, buses and conventional cars are seen as being fairer. Only 14% of those surveyed are prepared to spend CHF 45,000 or more on an electric car. This is in line with the price of the current top-selling electric car in Switzerland (Tesla Model Y).

8. For Generation Z, switching to an electric car is not just a question of cost, but also a question of lifestyle

Lower prices and charging costs, a longer range and good charging facilities remain the most important factors for switching to an electric car across all generations. But Generation Z also believes it is important that the electric car aligns in with their lifestyle and personal convictions.

9. Hybrid cars are more popular than electric cars

The number of hybrid vehicles is growing faster than the number of electric cars. By comparison, the number of cars with petrol or diesel engines continued to decline compared to the previous year, dropping from 87% to 82%. Electric vehicles, including full hybrids (6%), plug-in hybrids (5%) and fully electric vehicles (5%) can benefit from this in particular.

10. Owning a car becomes less important for commuting to work

Fewer people use their own car to get to work than in previous years, with the figure dropping to 43% compared to 47% in 2023 and 52% in 2022. The combined use of trains, buses and trams remains high at 73% (2022: 63%, 2023: 75%). Car sharing is becoming more popular, increasing from two per cent (2022) to just under three per cent (2024).

Sample demographics

- Average age: 45.6 years old
- Gender 48.4% female
  50.7% male
  0.9% other
- Language region 70.3% German
  23.8% French
  5.9% Italian

Study design

- YouGov online panel from the three language regions of Switzerland
- Representative sample of 1,037 people in Switzerland
- Survey period: 28 February 2024 to 11 March 2024

Detailed study report

These and many more insights can be found in the detailed study report on the Swiss Mobility Monitor 2024. Among other things, the results presented in the report provide insights into the adoption of mobility innovations. Detailed results on electromobility innovations, the sharing economy, the car-subscription model, 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 issues of autonomous mobility, sustainability and price acceptance.

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 and environmental awareness).

The detailed study report is part of **Swiss Consumer Studies.** The "Selected Insights" and the complete study report are available at the following link:
www.swissconsumerstudies.ch

For any questions about the study please contact: **swissconsumerstudies@unilu.ch**

Citation

Schakols, F., Giger, P., Greifenstein, M., Herger, P., Zazo, A., Hofstetter, R., Herrmann, A. (2024). Swiss Mobility Monitor 2024, University of Lucerne.

Acknowledgements

The study partners would like to express their sincere thanks to YouGov for their support with the study.

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