SWISS MOBILITY MONITOR 2022

– SELECTED INSIGHTS –

The Swiss Mobility Monitor, a study conducted by the Institute of Marketing and Analytics (University of Lucerne) and the Institute for Mobility (University of St. Gallen), is the first representative study across Switzerland that looks at how innovative mobility solutions are used and perceived in Switzerland and relates this to consumers' psychological needs.
The results presented in the study report provide a detailed insight into the mobility requirements of the population living in Switzerland. The publication places particular emphasis on the adoption of certain mobility innovations and is concerned with the underlying psychological needs that can either promote or impede the adoption of these innovations. 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:

1. **Mobility status**
   66% of residents in Switzerland use private transport while 32% use public transport. At just 2%, sharing services and ride services are still the least common form of transport in Swiss residents' individual mobility mix. Over 85% use a car and of those, 75% have their own car. The majority of respondents (52%) use a car to get to work or school. One third, the greatest proportion, only use their car to travel to work. On the whole, it is evident that the population is very open to the issue of multi-modality. Almost 50% of respondents are already considering using this for the routes that they travel.
2. **When it comes to individual mobility choices, people's emotions play a key role**
   Psychological needs, such as experiencing a flow state or the feeling of being in control play arelatively important role when it comes to using transport. A detailed analysis of these psychological needs as they relate to the relevant mobility innovations can be found in the study report.
3. **The Swiss want to retain control over their vehicles**
   Respondents prefer a car driven by a person over a self-driving car, not only to satisfy the need for power and control, but also to satisfy the need to achieve a flow state and to have fun.
4. **Those who own electric cars are impressed by them**
   People who own electric cars find them superior to cars with internal combustion engines. Some of the aspects being compared included the sense of power and control, and the price.
5. **The majority of the population will adopt e-mobility at a later stage**
   60% of respondents view themselves as part of the late majority or as laggards when it comes to adopting e-mobility. Only a small percentage of respondents consider themselves innovators (5.6%) or early adopters (8.5%) according to Rogers' Diffusion Theory.
6. **Car-sharing: sustainable and cost-effective**
   People who already car-share consider it a more sustainable and cost-effective alternative compared to using their own car. In terms of the need for power and control, they view car-sharing as being at a disadvantage compared to using their own car.
7. **People are confident in digital vehicle services**
   On average, digital vehicle services are considered useful and trustworthy. However, people do not want to consent to having their data collected by digital services in return for a financial benefit.
8. **The Swiss are adopting driver assistance systems**
   While 72% consider themselves to be part of the late majority or laggards with regard to autonomous mobility, 58% view themselves as innovators, early adopters or part of the early majority with regard to the use of driver assistance systems (according to Rogers' Diffusion Theory).
9. **Bricks-and-mortar retail is very important when buying a vehicle**
   Close to 88% of respondents say they would prefer to buy a car from a garage, while 4% would prefer to buy one on the internet. A crucial aspect here is trust in the dealerships. For 8% of respondents, where they purchase the vehicle (garage or internet) is not a decisive factor.
10. **Bricks-and-mortal retail meets consumers' needs**
   The results of the study suggest that buying a car from a garage aligns with the relevant needs of customers (e.g. social recognition, social justice and trust). This is less pronounced when buying through digital channels.

Sample demographics

– Average age	46.6	years old
– Gender	45.7%	female
	54.3%	male
– Language region	71.2%	German
	24.0%	French
	4.8%	Italian

Study design

- LINK online panel from the three language regions of Switzerland
- Representative sample of 1047 people in Switzerland
- Survey period: 2 December to 13 December 2021

Detailed study report

These and many more insights can be found in the detailed study report on the Swiss Mobility Monitor 2022. Among other things, the results presented in the report provide insight into the adoption of mobility innovations and the psychological needs that may impede adoption (e.g. the need to achieve a flow state, have fun, the need for power, control, trust, social justice and social recognition). Detailed results on electromobility innovations, the sharing economy, multi-modality, digital mobility purchase, autonomous mobility as well as connected mobility and digital vehicle services are presented.

The report consistently applies the perspective of people living in Switzerland and applies segmentation at selected points based on demographics and specific consumer characteristics (e.g. environmental responsibility).

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**

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

Citation

F. Rohlfsen, R. Hofstetter, D. Finken, L. Ilg, P. Herger, D. de Carvalho, A. Herrmann. Swiss Mobility Monitor 2022, University of Lucerne.

Acknowledgements

The study partners would like to express their sincere thanks to LINK.

UNIVERSITY OF LUCERNE · IMA Institute of Marketing and Analytics · University of St.Gallen Institute for Mobility · smg swiss marketplace group · AUTO SCOUT24 · ZURICH