

MEKO

The Mobility Barometer

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Understanding changes in mobility

A photograph of two young boys riding a bicycle together outdoors. The boy in the front is wearing a dark t-shirt and light blue jeans, and is looking forward. The boy in the back is wearing a grey t-shirt and light blue jeans, and is looking up at the sky. They are riding on a paved path with trees and a fence in the background.

“There is
nothing permanent
except change”

You may have heard this famous quote before, said by the Greek philosopher Heraclitus. He lived some 2 500 years ago, and he was right. But even if we live in an ever-changing world, there are some permanent needs.

One of them is the need of interaction, the need for humans to meet. The need for goods to be sent – short distances and overseas. We can refer to this as the need for mobility.

The need for mobility has been constant throughout history, although the means of mobility have varied. New technology has changed habits and societies. From the invention of the wheel to the first car powered by an internal combustion engine.

For us, it's not only about adapting to this shift - we want to contribute to it, enabling a more sustainable kind of mobility. A part of fulfilling this aim is to conduct The Mobility Barometer.

You are reading the first comprehensive report of its kind on opinions, trends and facts around mobility in Sweden, Norway, Denmark and Finland.

What are the habits today? Thoughts about tomorrow?
What pattern do we see? How did we get here? And what does all this imply when looking ahead? In short, the mobility barometer aims to increase knowledge - to better understand the constant changes in the permanent need of mobility. I hope you enjoy reading it.

Pehr Oscarson,
President & CEO
MEKO AB

Facts about the survey

The survey is conducted online with randomly chosen respondents over 18 years old, between the 25th of March and April 4th, 2022. In every country more than 1 000 people completed the survey, with the total number of respondents being over 4 000.

To correct for potential sampling biases and to account for the difference in country population size, the data is weighted on gender, age, and country population size.

Analysis is focused on showing the aggregated results for the people in the Nordics, as well as differences between countries and certain groups. The survey is conducted by Demoskop.



This is the Mobility Barometer

Through this barometer, we explore mobility patterns in Scandinavia. The aim is to give a comprehensive overview on how the people choose to transport themselves, why they choose to do it, the underlying factors that determines their decisions, and their wishes about personal transportation.

The mobility barometer is composed of two sections. The first focus on the results of a cross-national survey conducted in Denmark, Finland, Norway, and Sweden with more than 4 000 respondents.

The survey contains a broad range of questions about current habits in everyday life connected to personal transportation.

In the second section, we find the mobility Indicator, an index showing the difference between wants and use, between how one actually travels today and how one would like to move from A to B.

Summary

We spend a lot of time on the move. Every third spend up to an hour every day moving from A to B. We go to work, shopping and to work out. When we chose means of transportation, we want it to be available, comfortable, affordable and reliable. It can also be environmentally friendly, but that comes further down the list. In sum, the car ticks many of our boxes.

The car is by far the number one mean of transportation for the people in Denmark, Finland, Norway, and Sweden. However, there are significant differences between groups in how we use the car.

Bikes are our second choice. Almost four out of ten sits on a bicycle at least once every week. Danes use it more than others, and we think of the bike first and foremost as being healthy and environmentally friendly.



Public transport is our number three, even if quite few of us associate it with pleasure. On the other hand, we think it is environmentally friendly and available (if you live in cities). Further down the list comes other means of transportation like motorcycles, mopeds and electric scooters. Around 5 percent of us use these alternatives on a weekly basis.

What we do and what we want is not always the same thing. The report shows that we want to bike more than we do today and use the car a little bit less, especially in Sweden. This desire is true for all countries except for Norway. The Norwegians are pleased with their current driving. In general, the northerners embrace the green shift in mobility with more environmentally friendly type of fuels and vehicles. Cars powered by gasoline are still the number one choice, but electrical cars are clearly number two (not in Norway, however, where it is number one).

Many would like to drive an electric vehicle, but price, short mileage and lack of charging stations worry the sceptics. New habits and behaviors in mobility are emerging, like car sharing and mobile car services.

These trends seem to be in the beginning with a future potential. Younger people are clearly more positive to new solutions than others. A majority of the northerners believe in a future where the car is still important. Again, Norway stands out. No other people are as positive as the Norwegians about the future of the car.

The situation in Norway provide an interesting lesson. Norway has an ambitious strategy to encourage people to switch to electric vehicles. Emissions are reduced, car users are satisfied, and Norwegian drivers seems convinced that it is possible to combine driving with a sustainable future.

Mobility patterns in the Nordics

**Section
one**



We spend quite some time on the move

(especially if we're young)

We all live our lives different. In hectic, major city centers or in the quiet country-side, in small towns or remote suburbs. But regardless of our different choices, we have one thing in common: We spend quite some time on the move every day.

On average, four out of ten in the Nordics spend up to half an hour transporting themselves on a daily basis. Every third spend up to an hour. Looking closer at the separate countries, Finland stands out. In Finland, 65% of the population spend more than 30 minutes going from A to B. After the Finns comes the Norwegians (57%), the Danish (51%) and the Swedes (42%).

The group of Finns who has to transport themselves up to one and a half hour consists of 14% of the population, which is clearly more than the peer groups in the neighboring countries.

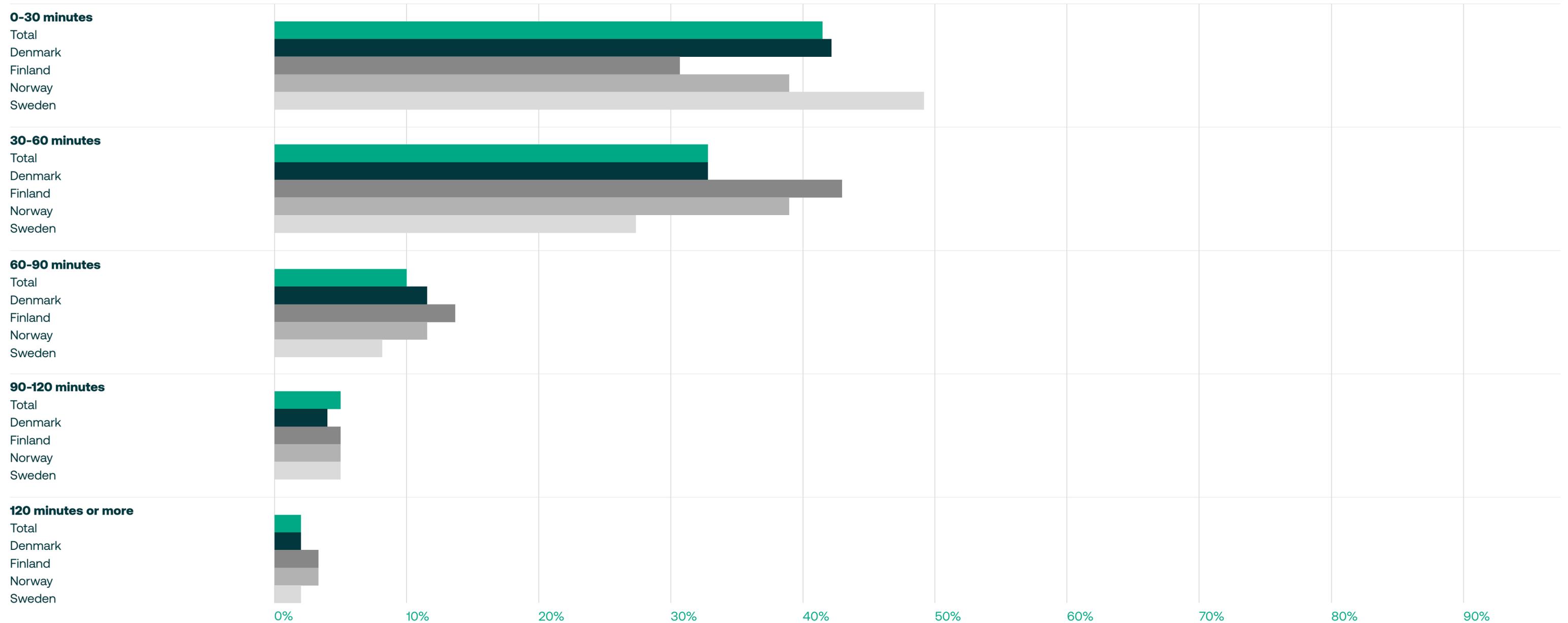
On the other hand, looking at trips under 30 minutes gives a mirrored image. In Sweden, shorter trips are more common than elsewhere in the Nordics. Every second Swede (49%) spend up to a maximum of 30 minutes per day on the move, compared to 43% for Denmark, 39% for Norway and only 31% for Finland.

Northerners share the need for transport, but spend different amounts of time on it depending on where they live. It is more common that people outside major cities have shorter distances from A to B, or at least an easier way to get there. Around every second person in small towns (50 000 inhabitants) spend 30 minutes or less on the move on a daily basis, compared to 38% in cities with more than 100 000 inhabitants. In big cities, on the other hand, the standard is to travel up to an hour.



Longer transportations are more common in Finland

How much time would you say that you spend transporting yourself on a daily basis?



Small towns, less commuting

How much time would you say that you spend transporting yourself on a daily basis?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (-10 000)
0-30 minutes	38%	42%	47%	44%
30-60 minutes	39%	35%	29%	29%
60-90 minutes	11%	9%	9%	12%
90-120 minutes	5%	4%	6%	5%
120 minutes or more	2%	3%	2%	3%
Uncertain/don't know	5%	7%	7%	8%

Young versus not so young

You are only as old as you feel, as the saying goes. But the fact is that age does matter when it comes to spending time on the move. More people between the ages of 18 and 34 spend up to an hour transporting themselves compared to all of the other age groups.

One in four under 35 spends between one or two hours moving from A to B every day. The comparable number for those over 65 is 8%, and 13% for people between 50 to 64. The most common transporting time in these groups is a maximum of 30 minutes every day.

Younger spend more time on the move

How much time would you say that you spend transporting yourself on a daily basis?

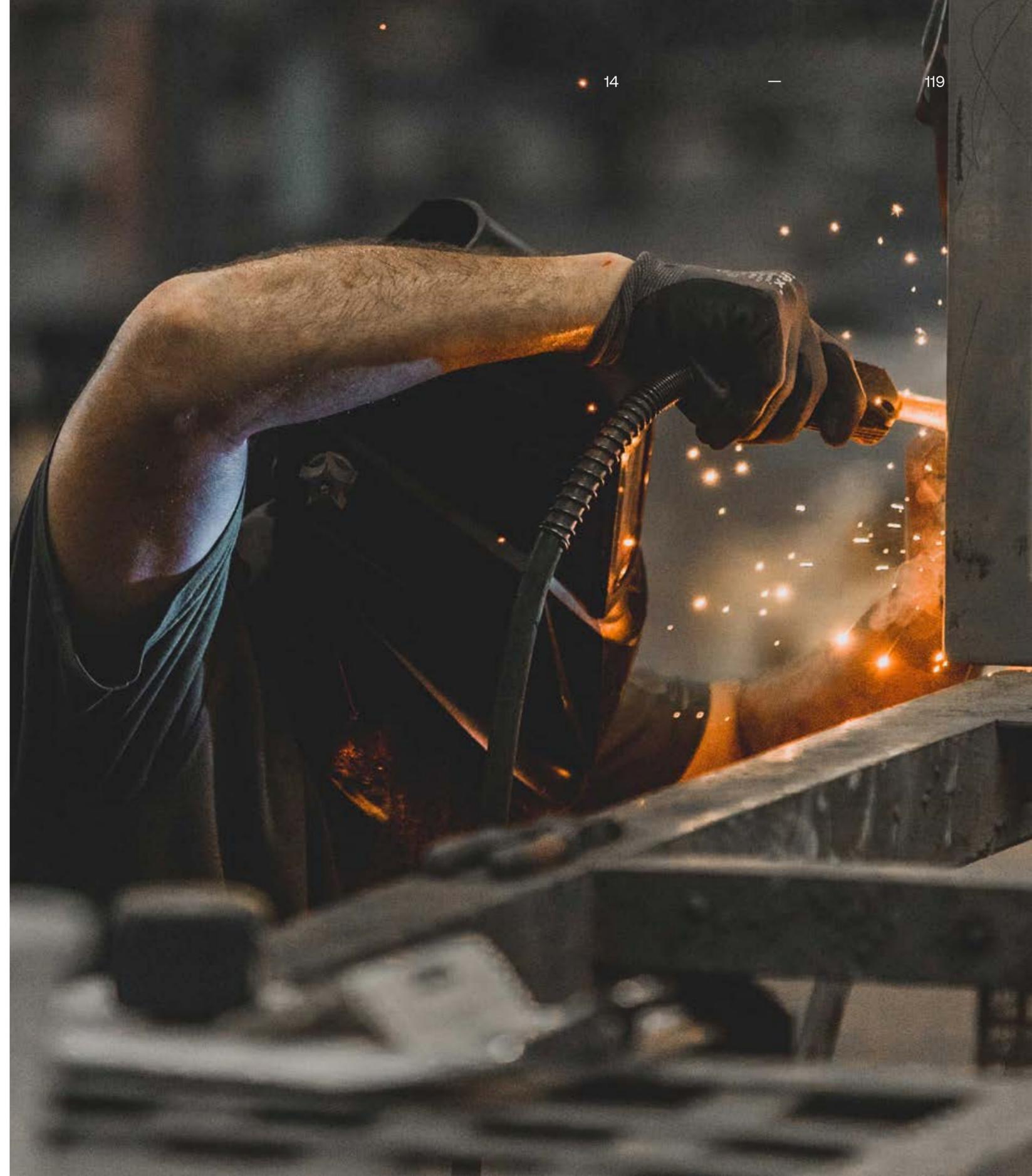
	18–34	35–49	50–64	65+
0-30 minutes	32%	38%	45%	53%
30-60 minutes	40%	37%	34%	24%
60-90 minutes	14%	11%	11%	6%
90-120 minutes	8%	7%	3%	2%
120 minutes or more	2%	3%	3%	1%
Uncertain/don't know	4%	4%	4%	14%

Why we leave home

So, what are the main motivations for moving from A to B?

To get the job done, basically. Getting to work is by far the most common reason for leaving home in all the Nordic countries.

In total, every second person indicates this as the main reason. In Sweden and Denmark, the figures are 52% and 51%, respectively. In Norway and Finland, the number is slightly lower at 46% and 41%. More men than women say they are leaving for work, as well as people between 35 and 49.





We do indeed share the need for mobility every day, and a closer look in the category “other main motivations for transportation” shows other common needs. One is to go to the store. Many of us do this every day, which make this category the second largest with 17%.

But life is more than working and shopping - it’s also about working out. In fact, getting to the gym or the training facility is one of the most common reasons for leaving home. This is the case for all the Nordic countries, where the Finns stands out with 14% indicating work out as the motivation for transportation (twice as many as in the other countries).

There are many logic and relevant reasons for us moving from A to B. But living also means being spontaneous, without structures or plans. As one Norwegian said: “Sometimes I just want to go to town”.

We commute to work

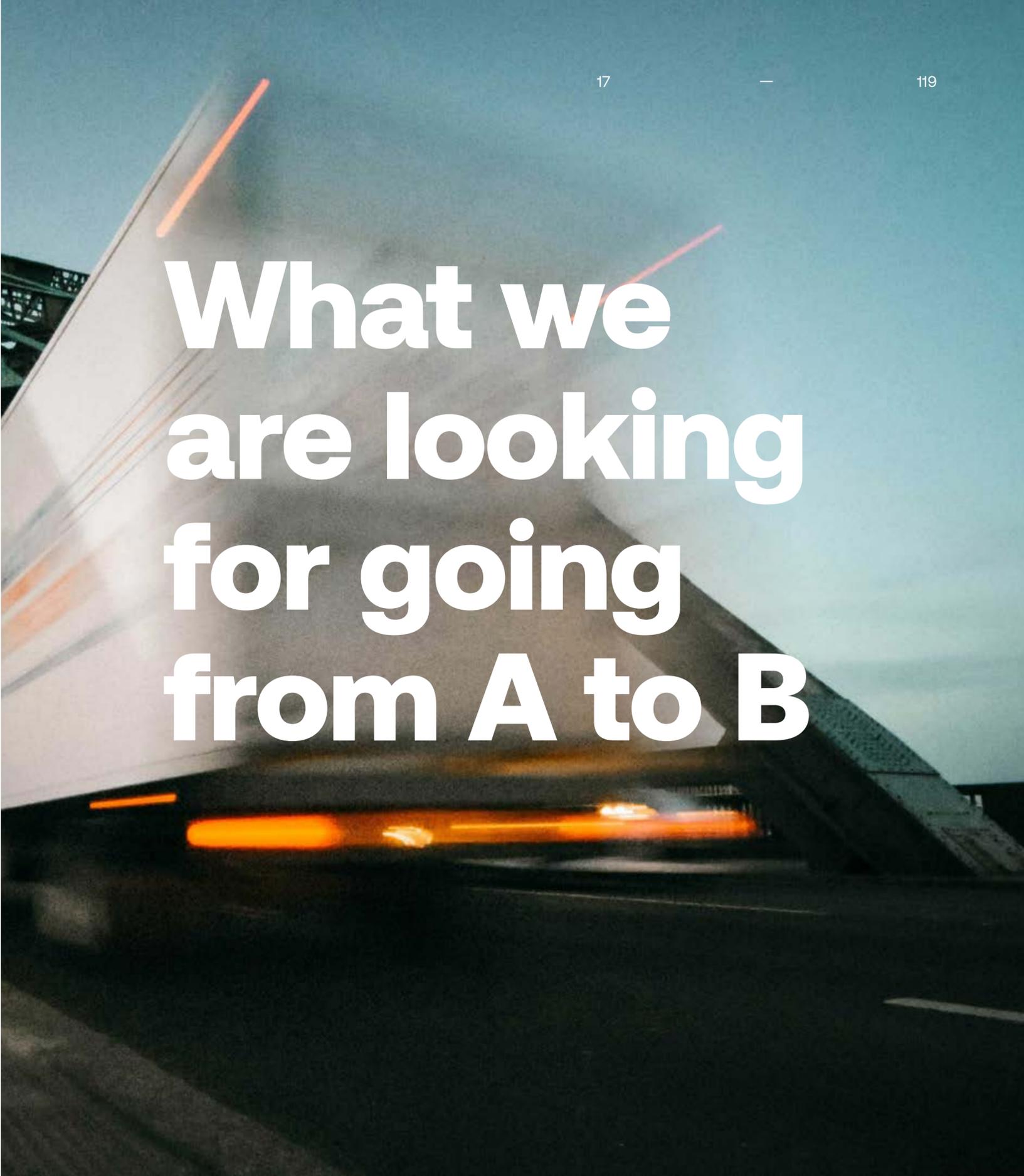
What's your main motivation for transportation on a daily basis?

	Total	Denmark	Finland	Norway	Sweden
Get to work	48%	51%	41%	46%	52%
Get to my education	5%	6%	4%	6%	5%
Take my kids to school	2%	2%	3%	3%	2%
After school activities	5%	1%	1%	3%	11%
Work out	7%	7%	14%	7%	4%
Go to a friend's house	3%	1%	6%	3%	1%
To see my family	4%	5%	2%	7%	3%
Uncertain/don't know	7%	4%	7%	6%	11%
Other reasons	17%	21%	23%	19%	11%

We know we spend a significant amount of time on the move every week. But how do we get around? What is important for us when we choose means of transportation?

A broad range of factors determine what mean of transportation we use. The most important one is availability. Interestingly, many of us want to do what we can to reduce emissions in our everyday life. We sort our waste, use canvas bags instead of plastic ones, and a lot more.

But when we choose means of transportation, environmental concerns are not even top five. It comes at seventh place. More people in Denmark say this is important (17%), and the least in Sweden (11%).



**What we
are looking
for going
from A to B**

The preferences that determine what type of transportation we use.

Which of the following factors determines what you use as a mean of transportation?

● Preference

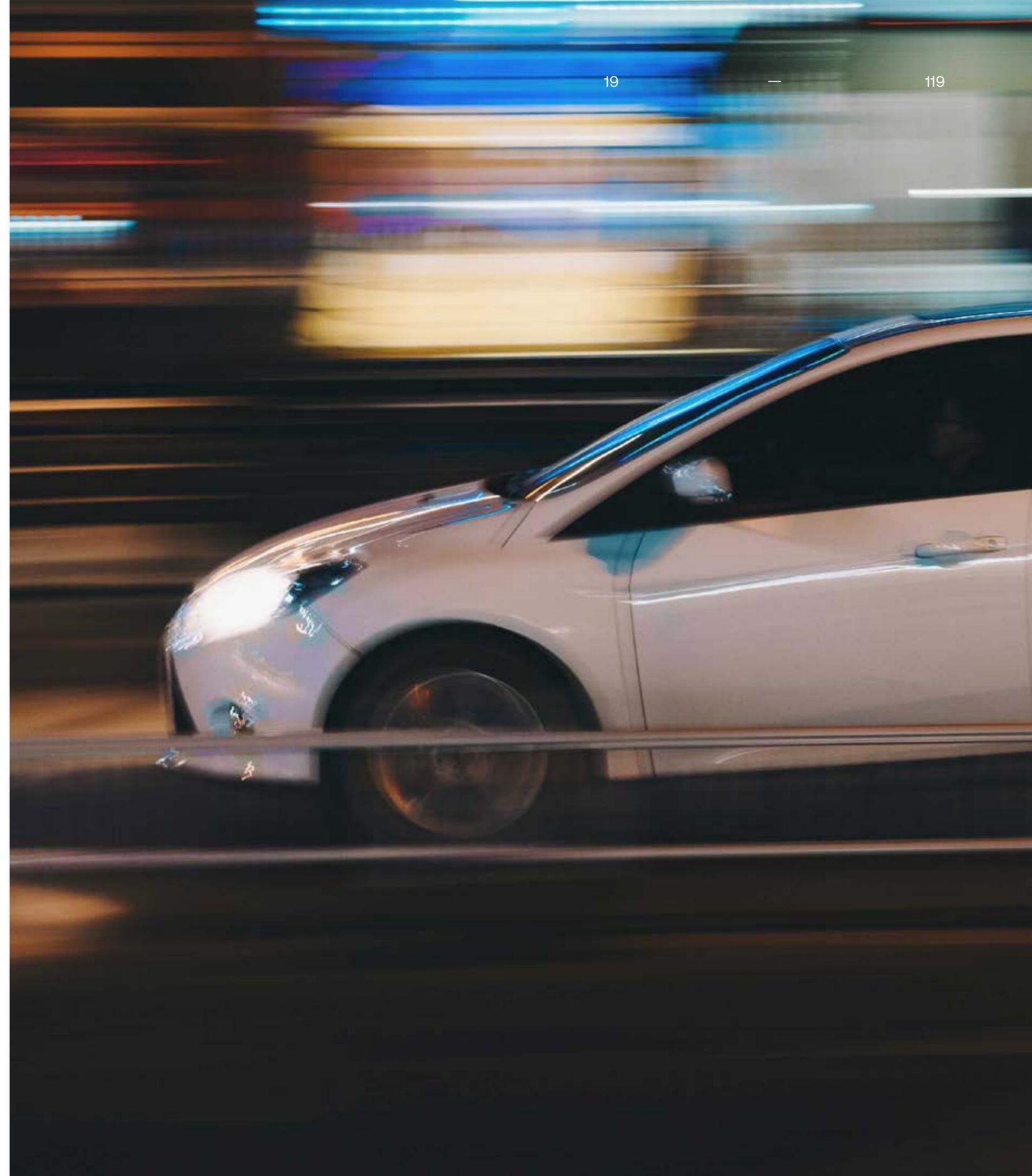


Car is king

The findings are clear: The car is still king. No other means of transportation comes near the popularity of the car. Eight out of ten northerners chose the car sometime every week. Four out of ten use the car several times a week and 25% use it every day. Only 8% say they rarely or never use the car.

The main reason for those who not use a car is simply that they lack access to a car. The second most common reason is that they have no driver's license, and thirdly that it is too expensive. Fourth, they mention environmental reasons.

The car is dominant in all four countries. The Danish and Norwegians uses the car most frequently, with 27% daily users. Then comes the Swedes (24%) and the Finns (23%). The differences are smaller on a weekly basis. 81% of all Swedes sits behind the wheel at least once a week, followed by the neighboring countries with 79%.



The car is dominant in the Nordic region

Consider transporting yourself from place A to B. On average, how often do you use a car?

	Total	Denmark	Finland	Norway	Sweden
Every day	25%	27%	23%	27%	24%
Multiple times a week	39%	38%	39%	38%	40%
Once a week	16%	14%	17%	14%	17%
Once a month	8%	9%	8%	8%	6%
Once a year	4%	3%	3%	3%	5%
Rarely/never	8%	7%	10%	9%	8%
Uncertain/don't know	1%	2%	1%	2%	1%



Striking differences between user groups

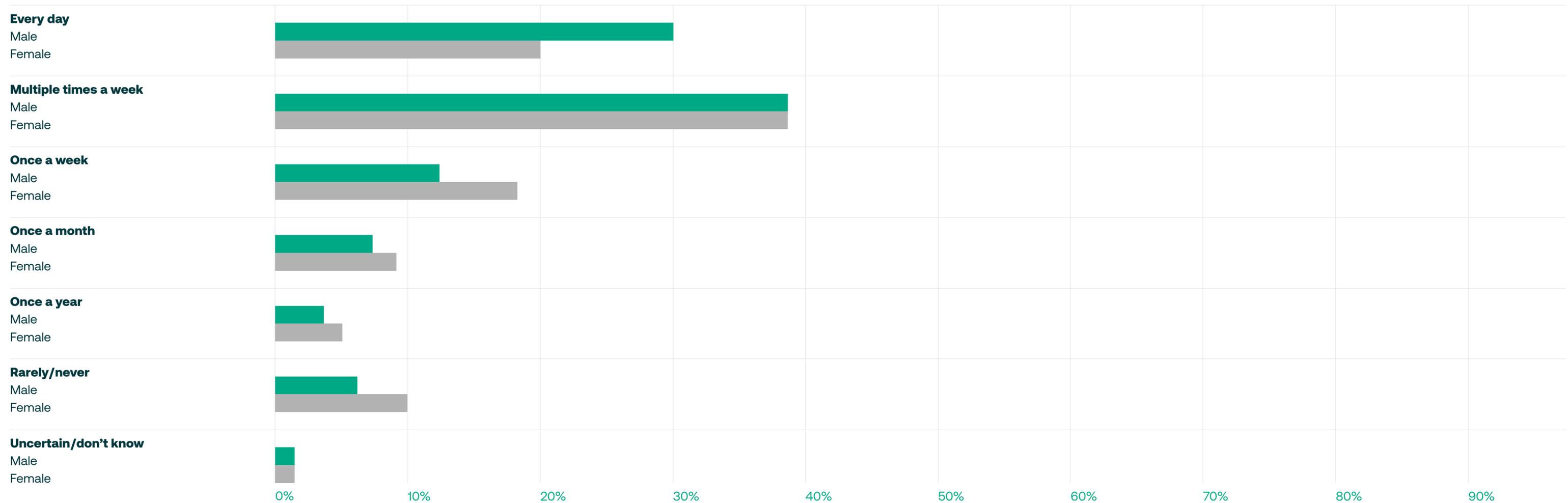
Do all groups use the car? Yes, the car is number one for everyone. But there are some interesting discrepancies between groups.

Men tend to drive more on a daily basis than women. If you live in the countryside, you spend significantly more time on the road than if you live in large cities. This is perhaps what you could expect - but the difference is striking. 83% in rural areas drives every day or multiple times a week, compared to 48% in the cities.

Another clear pattern is political ideology. People who consider themselves as politically “right” drives more than those who identify themselves as “left”. Still, no matter how you vote, the car is still your number one choice.

Men drives more often

Consider transporting yourself from place A to B. On average, how often do you use a car?



Countryside versus cities

Consider transporting yourself from place A to B. On average, how often do you use a car?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (<10 000)	Other
Every day	17%	24%	28%	34%	24%
Multiple times a week	31%	38%	43%	49%	32%
Once a week	19%	17%	14%	11%	25%
Once a month	12%	8%	5%	3%	11%
Once a year	7%	3%	2%	1%	0%
Rarely/never	12%	10%	5%	3%	4%
Uncertain/don't know	2%	1%	2%	0%	5%

Ideology matters

Consider transporting yourself from place A to B. On average, how often do you use a car?

	Left	Center	Right	No answer
Every day	18%	25%	34%	20%
Multiple times a week	34%	41%	41%	37%
Once a week	17%	16%	13%	15%
Once a month	12%	7%	4%	8%
Once a year	7%	3%	1%	3%
Rarely/never	11%	6%	6%	14%
Uncertain/don't know	2%	1%	1%	2%



Why we choose the car

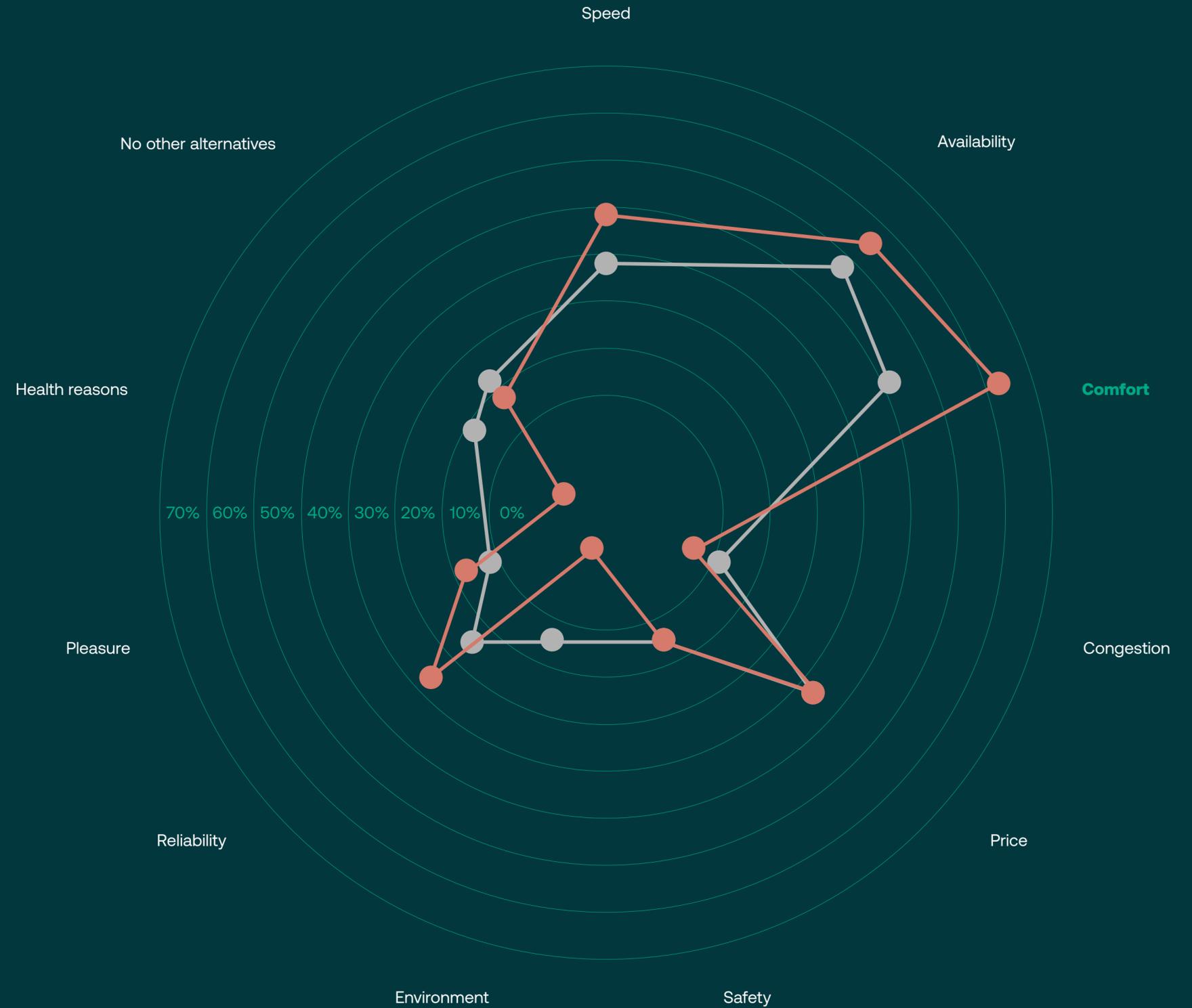
We all have our reasons for choosing our favorites, from ice cream to political parties. This also applies to choosing a car before the bike, public transport, electric scooters, motorcycles or mopeds. The car seems to tick almost all of the boxes for what is important for us when we choose means of transportation.

The Nordic people think the car is available, fast, reliable – and not least comfortable. Six out of ten associate the car with comfort. No other mean of transportation has a number that high. Men, women, younger, older – all have the same perception. The only ones that to a greater extent associates the car with something else are people who live in the countryside. With no nearby trams or buses, they primarily associate the car with availability (62%).

Put in another way, the car means freedom for many people. As one person said: “I can go from work when it suits me, not when the bus arrives”.

What do you associate car as a mean of transportation with?

- Preference
- Car



What is most important when we buy a car

25% of the Nordic people says that price is most important, which makes it the most important factor by far. Money isn't everything though. We also want a safe ride.

Safety is ranked number two at 13%, followed by how long the car will live at 10%. Only a few of us, 3%, claim the importance of the car being electric and about as many say the brand is the most important.



This matters the most when we choose our car



When choosing a car, what matters the most to you?

	Total
Price	25%
What brand it is	13%
Uncertain/don't know	11%
How durable it is/how long it will live	10%
How far you can get on a full tank/fully charged	8%
The size of the car	8%
How environmentally friendly it is	6%
Other reason	5%
That it uses traditional source of fuel (gas/diesel)	5%
What brand it is	4%
If it's electric	3%
Speed/power/horsepower	2%

If you don't sit behind the wheel going from A to B, you might be holding a handlebar feeling the wind in your face. The bike is the second most popular means of transportation in the Nordics, and as we will see later this vehicle is gaining ground.

Almost four out of ten sits on a bicycle at least once every week. One fifth of us use a bike several times a week, and about one out of ten rolls on the streets every day.

The Danes lead the two-wheeled race in the Nordics. 18% in Denmark use the bike every day, and an additional 20% several times a week. That adds up to four out of ten.

In Norway, only 4% choose the bike every day, and 14% every week. In total, not even three out of ten. Finland and Sweden come in between.



**Bikes
are
speeding
up**

The Danes are leading the two-wheeled race

Consider transporting yourself from place A to B. On average, how often do you use a bike?

	Total	Denmark	Finland	Norway	Sweden
Every day	9%	18%	6%	4%	9%
Multiple times a week	19%	20%	23%	14%	18%
Once a week	10%	12%	12%	10%	9%
Once a month	16%	12%	16%	18%	18%
Once a year	11%	7%	12%	11%	13%
Rarely/never	31%	28%	28%	40%	31%
Uncertain/don't know	3%	3%	2%	4%	2%

Differences between user groups

There are similarities in how men and women use cars and in how they use bikes. As when using cars, men tend to be more interested than women in rolling the streets, at least they use the bike more. Around four out of ten men use the bike every week, compared to every third woman.

Another clear pattern is connected to population density. Around four out of ten living in major or medium sized cities bikes every week. In rural areas, only 24% do.



Men bike more often

Consider transporting yourself from place A to B. On average, how often do you use a bike?

	Male	Female
Every day	11%	8%
Multiple times a week	21%	16%
Once a week	11%	10%
Once a month	18%	15%
Once a year	10%	12%
Rarely/never	27%	36%
Uncertain/don't know	2%	3%

Where we live matters

Consider transporting yourself from place A to B. On average, how often do you use a bike?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (<10 000)	Other
Every day	13%	11%	7%	5%	10%
Multiple times a week	21%	19%	20%	13%	25%
Once a week	9%	11%	12%	10%	3%
Once a month	15%	19%	16%	18%	4%
Once a year	10%	10%	10%	13%	0%
Rarely/never	30%	26%	30%	39%	50%
Uncertain/don't know	2%	3%	4%	2%	7%



Why we choose the bike

Choosing the car is much about choosing comfort, as we have seen. But what is the attraction of the bike? The answer is completely different and has really nothing to do with comfort.

Biking is more about health and the environment. In fact, six out of ten associates the bike with being environmentally friendly. That together with health, is the most common association amongst the northerners.

Biking is also quite fun. 17% associates biking with pleasure. Again, however, some interesting differences can be noted between the countries. The bicycle-friendly Danes are more positive than the others, especially the Swedes. Only 13% of the Swedes associate biking with pleasure, which clearly stands out as the lowest number among the Nordic countries.

Availability is also an important advantage, three out of ten have this as an association. In this case, the geography and climate seem to matter. 44% of the ones living in flat and milder Denmark think the bike is an available alternative, but only 29% of Norwegians and Finns.

When choosing a bike, what matters the most to you?

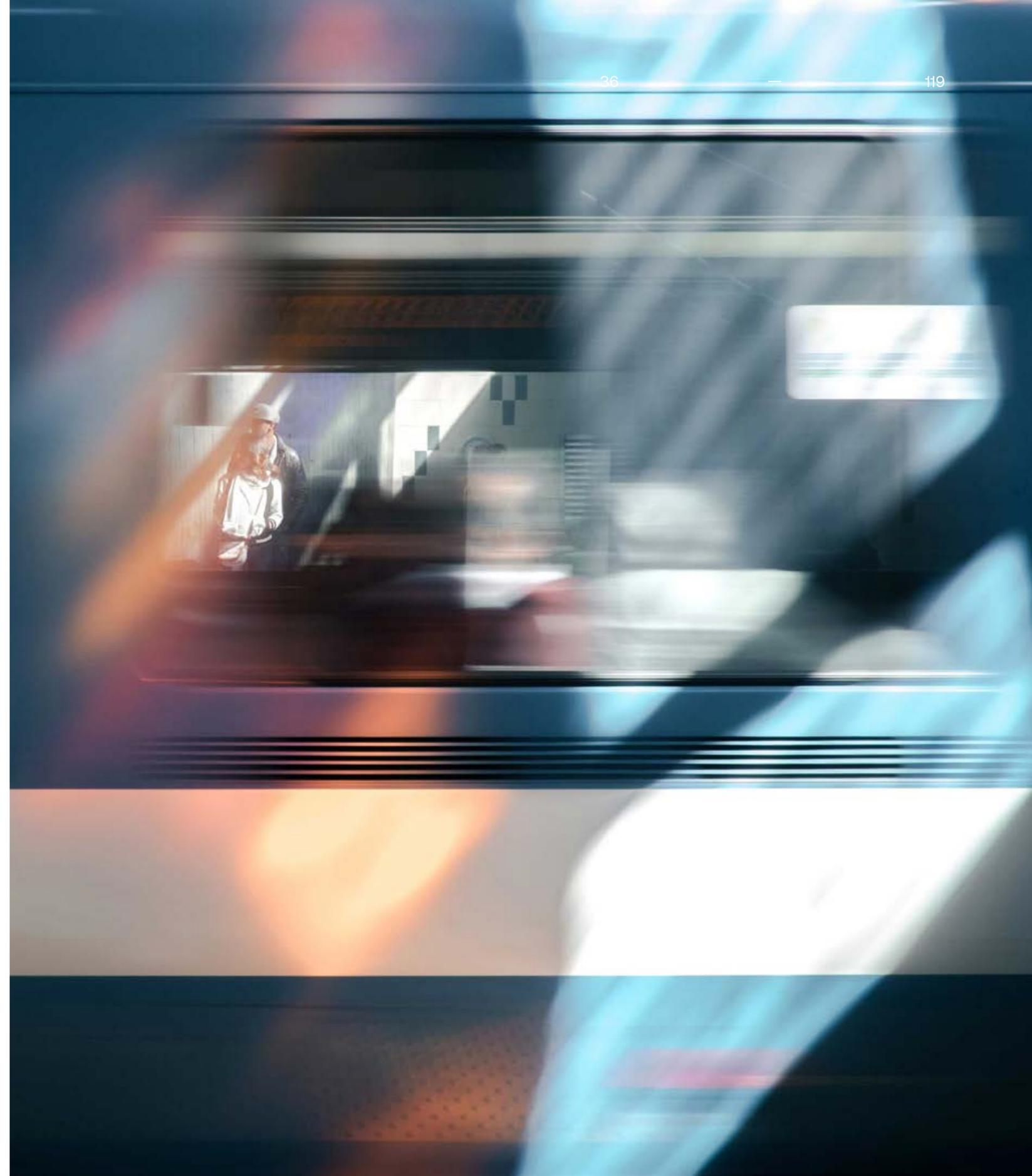
- Preference
- Bike



Public transit divides us

Actually, we are not that excited about public transport. We seem to dislike using it. Only 4% of us associate it with pleasure, which is by far the lowest number compared to how much we associate pleasure with driving a car (14%) or a bike (17%).

Interestingly, women are more negative than men, with only 3% feeling pleasure travelling with public transport compared to 5% of men. Perhaps this is related to the fact that more women than men use public transport several times a week.



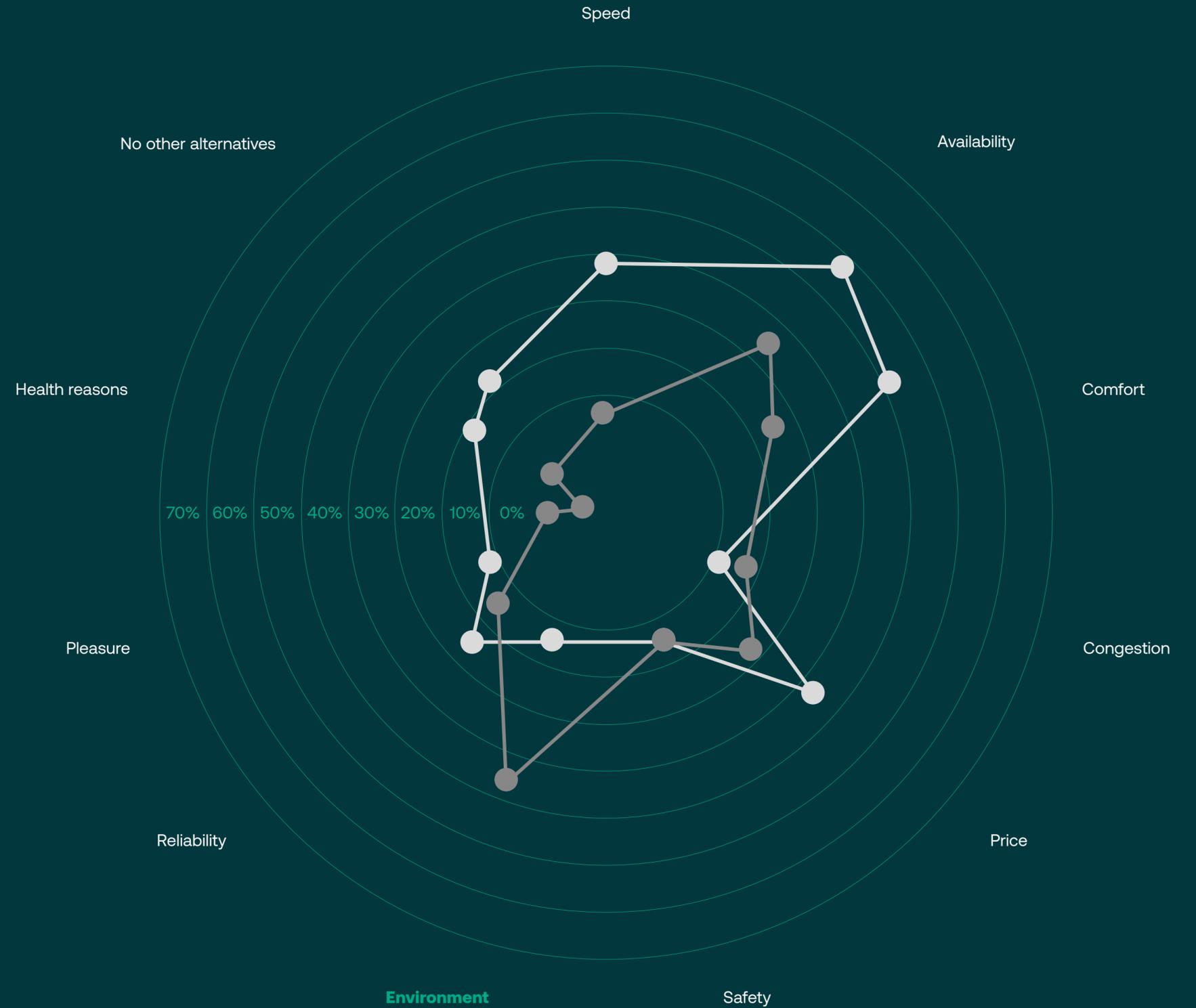
It's there and its working

On the positive note, northerners associate public transport with two important factors; It is environmentally friendly, and it is available. More than 40% think of public transport as a green way of travelling, and around one out of three label it as available. In addition, one out of five think it's comfortable, especially in Sweden. The Danes, however, are not as impressed about the comfort.

Still, what the northerners thinks about availability naturally depends on where you live. Only 18% in rural areas think that public transport is available, compared to 43% in major cities. The ones living on the countryside also clearly think that public transport is less reliable compared to those who live elsewhere.

What do you associate public transit as a mean of transportation with?

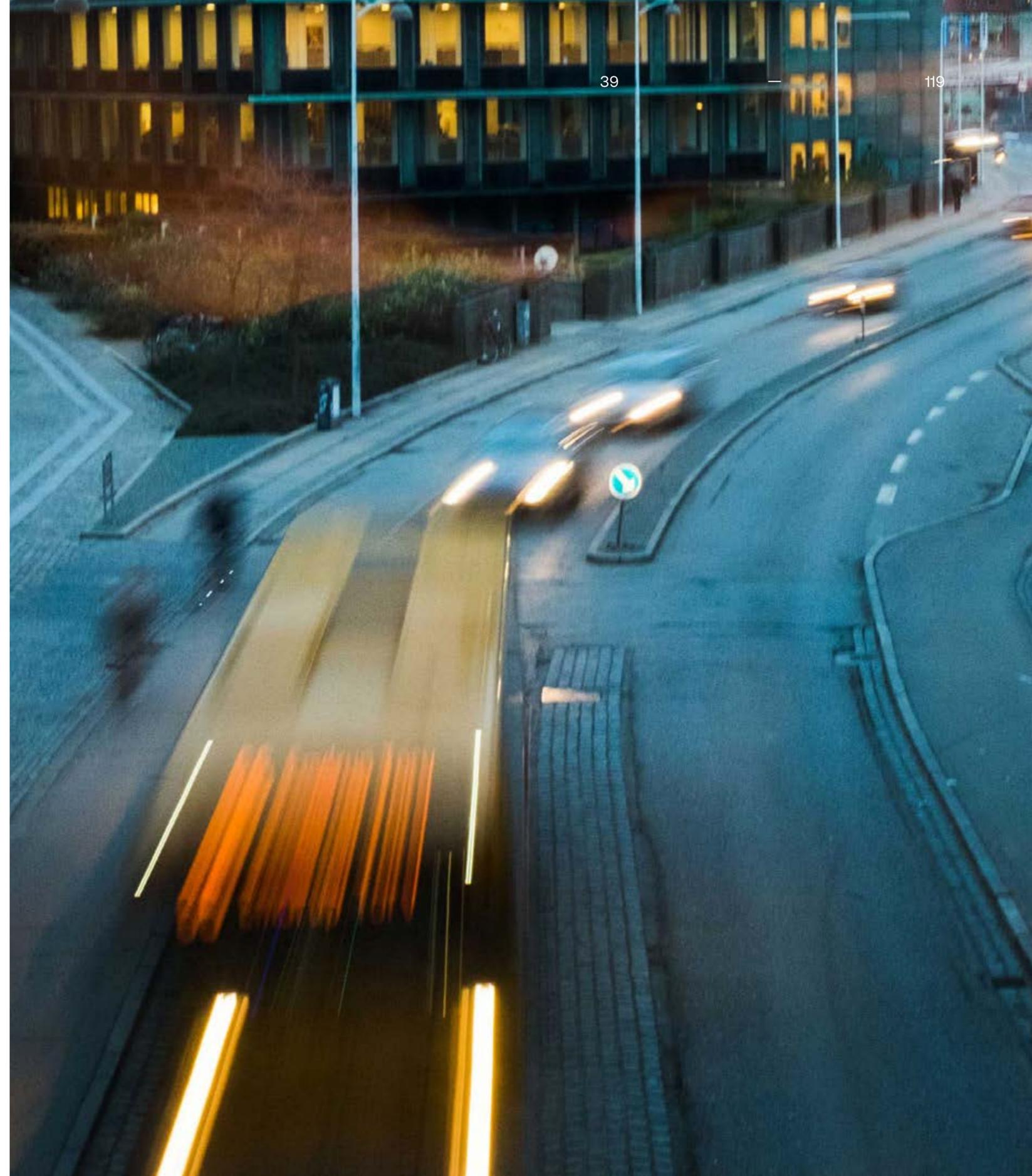
- Preference
- Public transit



Maybe not a pleasure, but we still use it

We do take buses, trams and use the subways. One third of the northerners use public transport every week.

It seems clear that we first and foremost use it to get to work or school, as most of us use public transport once or several times a week and not every day. Only 6% do, compared to 25% that travel once or several times a week.



One third of us use public transport

Consider transporting yourself from place A to B. On average, how often do you use public transit (tram, subway, bus, train, boat)?

	Total	Denmark	Finland	Norway	Sweden
Every day	6%	5%	5%	8%	7%
Multiple times a week	14%	10%	13%	17%	16%
Once a week	11%	12%	10%	12%	10%
Once a month	24%	24%	24%	25%	22%
Once a year	19%	20%	22%	16%	17%
Rarely/never	25%	27%	25%	20%	26%
Uncertain/don't know	2%	2%	1%	2%	2%

Differences between user groups

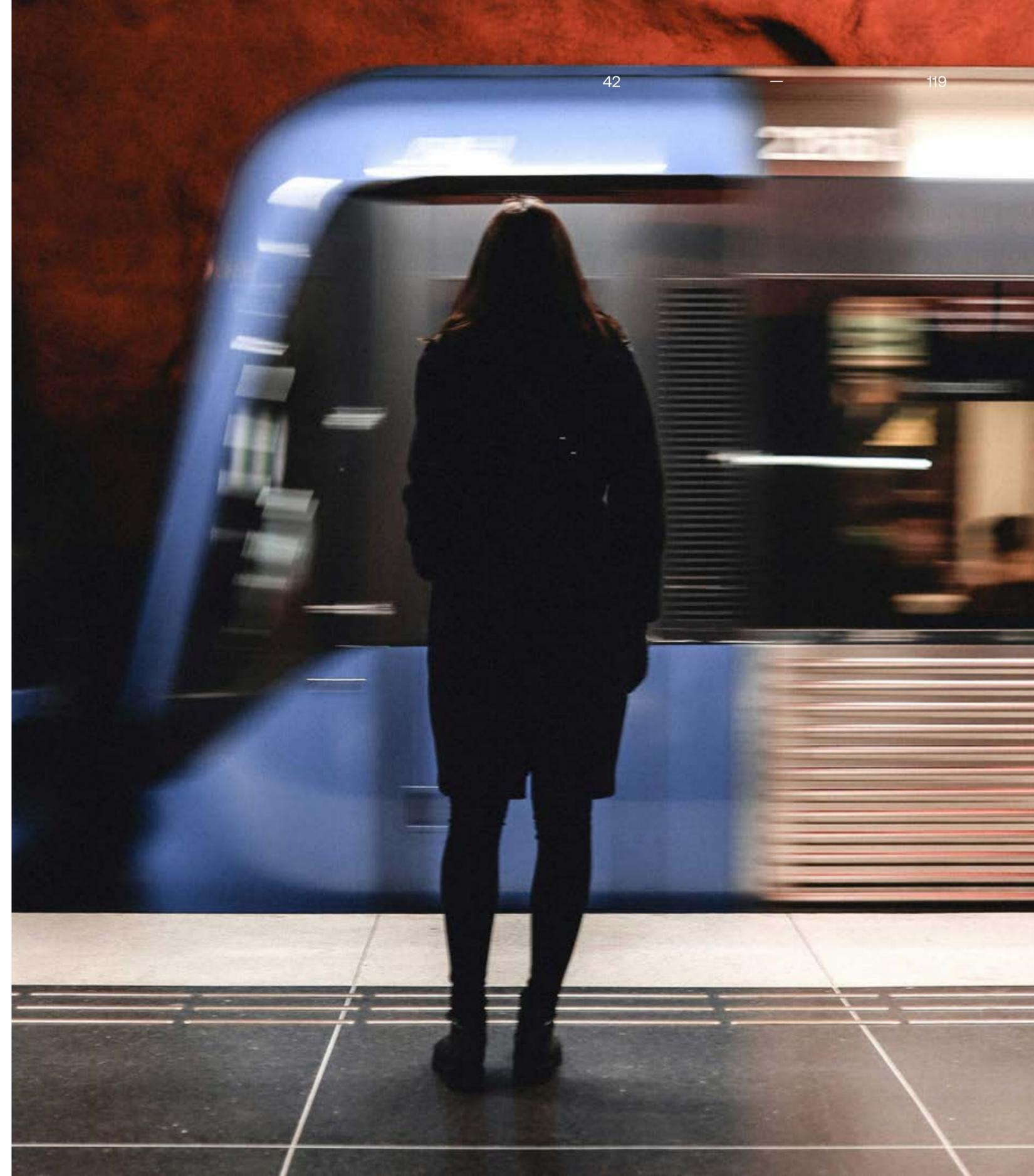
If the northerners to a large extent share habits using the car, the opposite is true for using trams, buses and subways. No other mean of transportation divides us as much.

Geography is a key divider. There are significant differences in habits between cities and rural areas. In major cities, every second person use public transport at least once a week. In rural areas, only one out of ten do. Looking closer, the connection is clear; The smaller the city, the fewer people use public transport.

Not only do geography matter. There also seems to be a connection to where we stand politically. Regarding political orientation, almost 40% of the ones regarding themselves as left use public transport at least once a week. On the right side of the spectrum, the number is 26%. In between, we have 31% of the “center”-voters using public transport every week.

However, this doesn't mean that political orientation has a direct effect on public transportation usage. It might just be that groups that use public transportation more often than others. Young people, women and people with lower than average income - tend to position themselves on the left side of the political spectrum to a higher degree.

Younger spend more time on the move than others. And they especially use trams, buses and the subway. Every second person between 18 and 34 use public transport at least once a week. No other age group is near that number.



Vast geographical differences

Consider transporting yourself from place A to B. On average, how often do you use public transit (tram, subway, bus, train, boat)?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (<10 000)	Other
Every day	11%	6%	3%	2%	8%
Multiple times a week	24%	11%	9%	4%	14%
Once a week	16%	11%	8%	4%	20%
Once a month	26%	25%	25%	18%	6%
Once a year	10%	22%	24%	25%	14%
Rarely/never	12%	21%	28%	44%	39%
Uncertain/don't know	1%	3%	3%	2%	0%

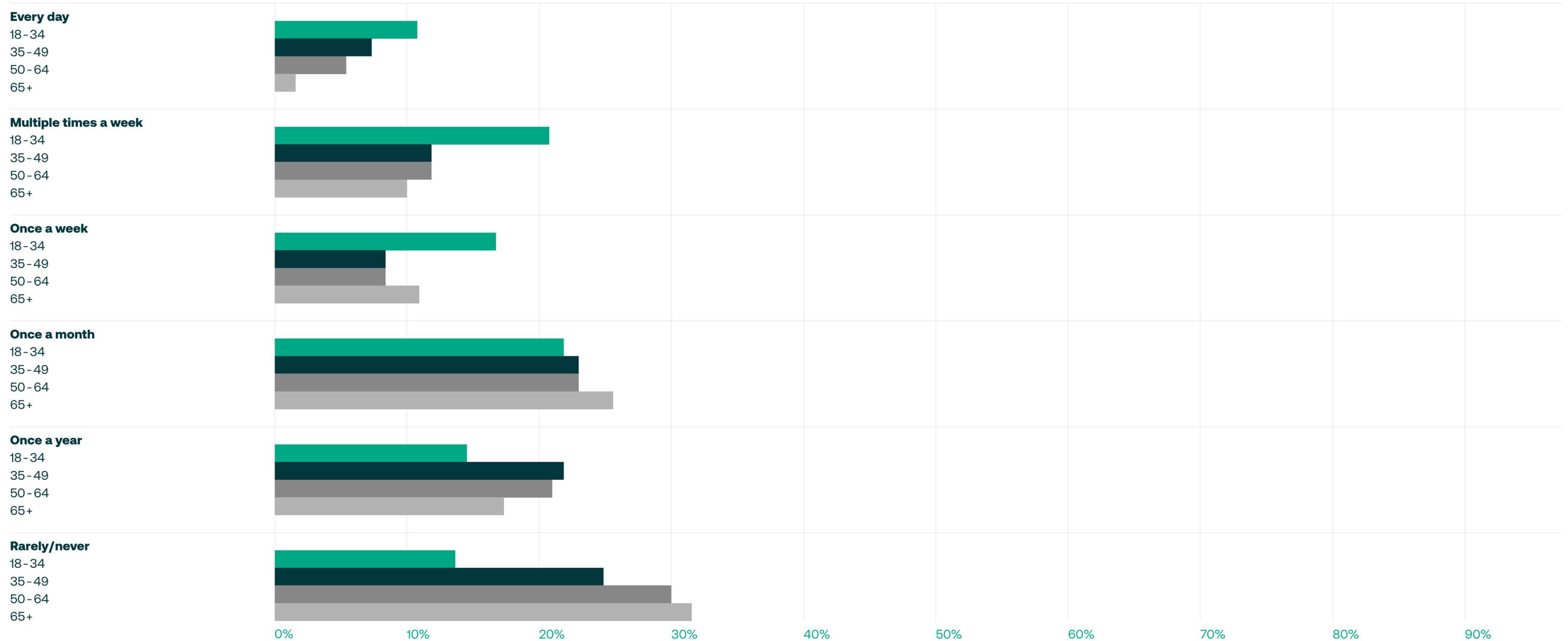
More passengers to the left (political)

Consider transporting yourself from place A to B. On average, how often do you use public transit (tram, subway, bus, train, boat)?

	Total	Left	Center	Right	No answer
Every day	6%	8%	6%	6%	7%
Multiple times a week	14%	19%	14%	11%	12%
Once a week	11%	12%	11%	9%	8%
Once a month	24%	24%	25%	24%	18%
Once a year	19%	17%	19%	20%	18%
Rarely/never	25%	19%	23%	29%	33%
Uncertain/don't know	2%	2%	1%	1%	4%

Younger are more frequent passengers

Consider transporting yourself from place A to B. On average, how often do you use public transit (tram, subway, bus, train, boat)?





The other ways of getting around

We have seen that many people sit behind the wheel, roll on the bike, or stand in the tram on a daily basis.

But there are options. You can choose other ways of transporting yourself. The most popular alternatives are used by 5% of the northerners at least once a week - motorcycle, moped and electric scooter. Very few northerners fly that often.

The motorcycle, is in the same way as cars, going through a shift in how it is powered; turning away from the combustion engine to more environmentally friendly alternatives like electricity.

As indicated, 5% of the northerners ride an MC every week. 1% use it daily; 4% sits on it at least once a week. Interestingly, as many as use it every week also use it once a month or once a year.

We find the most dedicated bikers in Norway. 8% of the Norwegians roll the streets every week, clearly the highest number in the Nordics. The bicycle-loving Danes are not as fond of the motorized version. Zero percent use an MC every day, and only 3% on a weekly basis.

As with bicycles, men use MC's more than women. 9% of men ride it every week compared to 2% for women. But the archetype of a typical biker as a grey haired 50+ male on a Harley Davidson is wrong. The typical one is between 18 and 35 (gray-haired or not).

The motorcycle



The dedicated minority of bikers

Consider transporting yourself from place A to B. On average, how often do you use a motorcycle?

	Total	Denmark	Finland	Norway	Sweden
Every day	1%	0%	1%	1%	0%
Multiple times a week	2%	1%	3%	4%	2%
Once a week	2%	2%	2%	3%	3%
Once a month	3%	1%	2%	4%	3%
Once a year	2%	2%	3%	2%	3%
Rarely/never	86%	89%	85%	83%	87%
Uncertain/don't know	4%	5%	4%	3%	3%

The typical biker is younger

Consider transporting yourself from place A to B. On average, how often do you use a motorcycle?

	18—34	35—49	50—64	65+
Every day	2%	0%	0%	0%
Multiple times a week	5%	1%	2%	1%
Once a week	5%	1%	1%	0%
Once a month	5%	1%	2%	1%
Once a year	4%	2%	2%	2%
Rarely/never	74%	92%	89%	91%
Uncertain/don't know	5%	2%	3%	5%

The moped

Turning to the moped it is not the fastest motorized bike there is, but often regarded as effective and smooth. This alternative is undoubtedly most popular amongst the younger.

13% of the population between 18 and 35 drives a moped at least once a week, compared to the average usage of 5%. One explanation might be that younger more easily can afford a moped but not a car, and that it is easier to get a license.

Again, men's stronger attraction to motorized two-wheeled vehicles is reflected in the habits. 7% of all men use a moped on a weekly basis compared to 2% of the women, and the Norwegians are more interested than others. Looking at where you live, it is clear that the moped is most popular amongst city dwellers and least attractive in the countryside. One possible explanation may be that frustrated car commuters have had enough of time-consuming traffic jams and have jumped on the moped instead.

The Norwegians use the moped most

Consider transporting yourself from place A to B. On average, how often do you use a moped?

	Total	Denmark	Finland	Norway	Sweden
Every day	1%	1%	1%	1%	0%
Multiple times a week	2%	1%	2%	2%	2%
Once a week	2%	1%	1%	3%	2%
Once a month	3%	1%	2%	3%	3%
Once a year	2%	2%	2%	2%	3%
Rarely/never	87%	89%	88%	85%	86%
Uncertain/don't know	4%	5%	4%	4%	3%

The moped is most frequently used in cities

Consider transporting yourself from place A to B. On average, how often do you use a moped?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (-10 000)	Other
Every day	1%	2%	0%	0%	0%
Multiple times a week	2%	2%	1%	1%	10%
Once a week	2%	4%	1%	1%	0%
Once a month	2%	3%	4%	3%	0%
Once a year	2%	3%	2%	3%	0%
Rarely/never	88%	82%	87%	89%	79%
Uncertain/don't know	3%	6%	4%	2%	11%

The electric scooter

The electric scooter might be perceived as a newcomer, but it is not. This vehicle is claimed to be almost as old as the car, even if it has lived a secluded life for a long time and is differently fueled now than in the early 20th century. Back in the days, it was powered by gas.

Today, we power it with batteries. The electric scooter is a city-phenomenon and a part of what is called micromobility. To qualify into this category the vehicle must be small, light, not too fast, and steered by one single person (which also qualify bikes, electric bikes and electric skateboards).





But even if electric scooters are common in the cities, only 5% of the northerners use one every week. Obviously, city dwellers are the ones that use them on a regular basis, and the electric scooters are most popular in medium sized cities. Here, 9% use it at least once a week. In the major cities, the number is 5.

Again, the Norwegians tend to be most interested with 9% weekly users, followed by the Swedes at 6%. The Danes are far less attracted. Only 1% of the Danes use an e-scooter every week.

An interesting age pattern also emerges. Or put this way; Electric scooters are quite hot for those under 35, but ice cold for the ones that has turned 50. 13% under 35 use an e-scooter at least once a week, compared to zero percent for those over 50.

Micomobility with electric scooter

Consider transporting yourself from place A to B. On average, how often do you use an electric scooter?

	Total	Denmark	Finland	Norway	Sweden
Every day	1%	0%	1%	2%	2%
Multiple times a week	2%	0%	2%	3%	2%
Once a week	2%	1%	1%	4%	2%
Once a month	3%	2%	2%	4%	3%
Once a year	3%	2%	3%	4%	3%
Rarely/never	86%	89%	87%	79%	86%
Uncertain/don't know	4%	5%	4%	4%	3%

Most popular in medium sized cities

Consider transporting yourself from place A to B. On average, how often do you use an electric scooter?

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (<10 000)	Other
Every day	1%	2%	1%	0%	3%
Multiple times a week	2%	3%	1%	0%	6%
Once a week	2%	4%	2%	0%	0%
Once a month	4%	3%	2%	2%	0%
Once a year	4%	3%	2%	2%	0%
Rarely/never	84%	80%	86%	92%	83%
Uncertain/don't know	3%	5%	5%	3%	7%

Not so attractive for those over 35

Consider transporting yourself from place A to B.

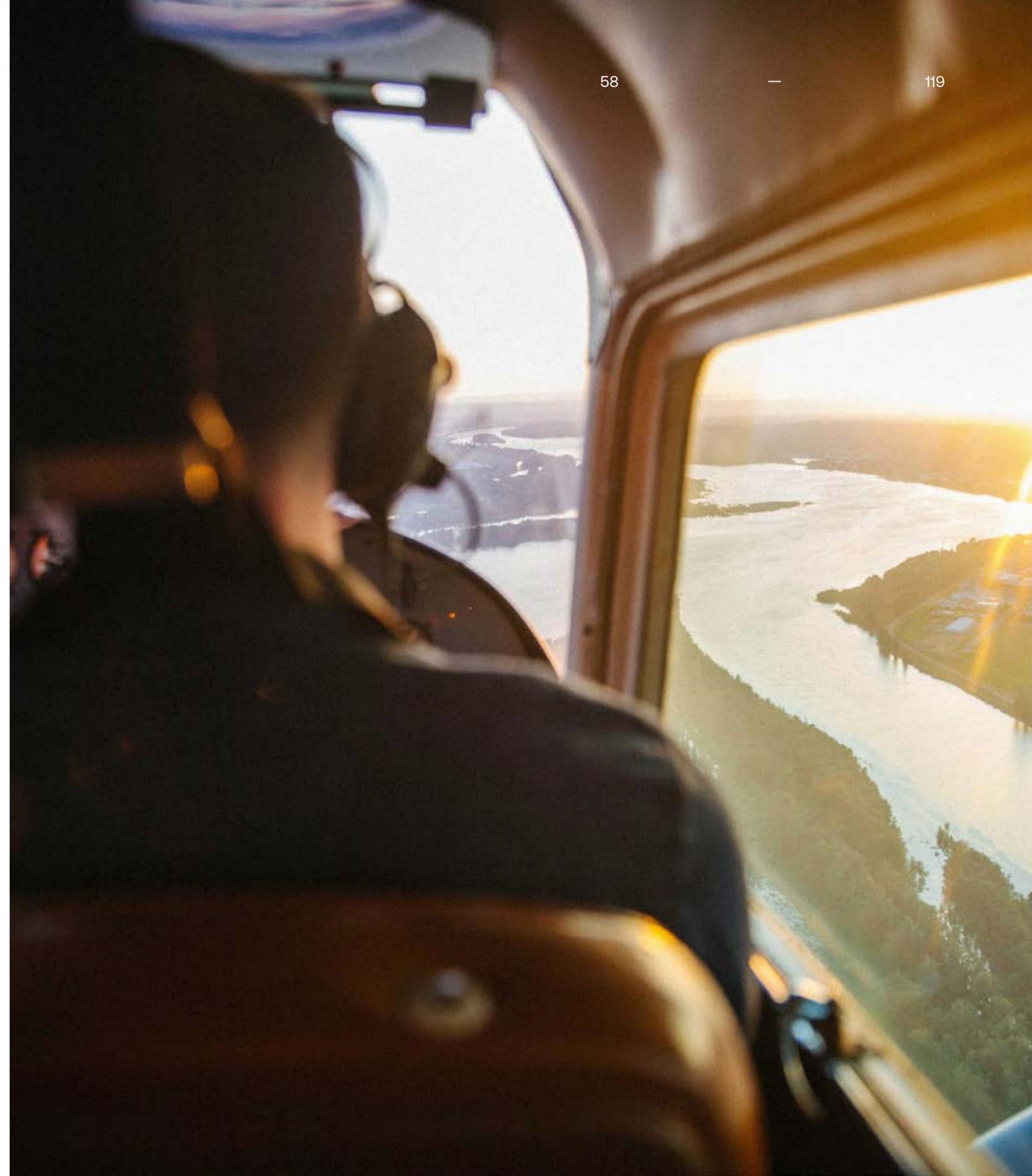
On average, how often do you use an electric scooter?



Airplane

Very few in the Nordics use airplanes to move from A to B on a daily basis. We count to 1% daily users and only in Norway and Finland. (In Norway, however, 5% use airplane on a weekly basis).

It is far more common that the northerners fly sometimes a year. 44% of the Nordic people indicate that they fly once every twelve months. The Norwegians fly more than others with 52% yearly travelers followed by the Danes at 46%. Only a third of the Finns fly every year. In Sweden, the number is four out of ten.



We don't fly that often

Consider transporting yourself from place A to B. On average, how often do you fly with an aeroplane?

	Total	Denmark	Finland	Norway	Sweden
Every day	0%	0%	1%	1%	0%
Multiple times a week	1%	1%	0%	2%	1%
Once a week	1%	1%	1%	2%	1%
Once a month	6%	4%	3%	12%	5%
Once a year	44%	46%	36%	52%	42%
Rarely/never	46%	44%	57%	28%	50%
Uncertain/don't know	3%	3%	2%	4%	1%

Section two

**We don't always
act like we
want to.**

The Mobility Indicator reveals the gap

What we want and what we do is not always the same thing.

Sometimes you have a good reason - it might be impossible to act the way you wish. Sometimes you just don't have the energy or will.

This also applies when we look at how we transport ourselves. Do we use the means of transportation that we really want to use? To find out, we turn to the Mobility Indicator.

The Mobility indicator is built up on two questions

First, a question about how often one uses a specific mean of transport. Secondly, how often one would like to use it. The answers are compared, which results in an index that provides an overview of the relationship between the two.

A positive number indicates that we would use a specific mean of transportation more than we do today for a specific timeframe. Consequently, a negative number reveals that we use it a bit more than we desire.



We want to use the car slightly less — except in Norway

As seen, the car is by far the number one choice for all groups when we leave home. No other mean of transportation is near the popularity of the car. At the same time, we seem to think that the four-wheeled vehicle could rest a little more in the parking lot.

In general, 5 percentage points less wants to use the car multiple times a week compared to how many that actually uses it multiple times a week. This is true especially in Sweden where the difference is 8 percentage points. No other country has such a high number, or let's call it "bad conscience", for driving a car several times a week.

Norwegians, on the other hand, are clearly more satisfied with their current habits, which almost completely matches their wishes. This, as we will see later, may have an interesting explanation.

City dwellers do want to use the car a bit less, but not to the same extent as the ones living in the countryside.

9 percentage points less of the ones living in rural areas wants to use the car several times a week, compared to how many of them that actually use it this often.

Men, who drive cars more than women, also wish to use them a little bit less than women. This is also the case for the ones between 18 and 34; they prefer the car in relation to all other means of transportation but would like to park it slightly more often during weekdays.

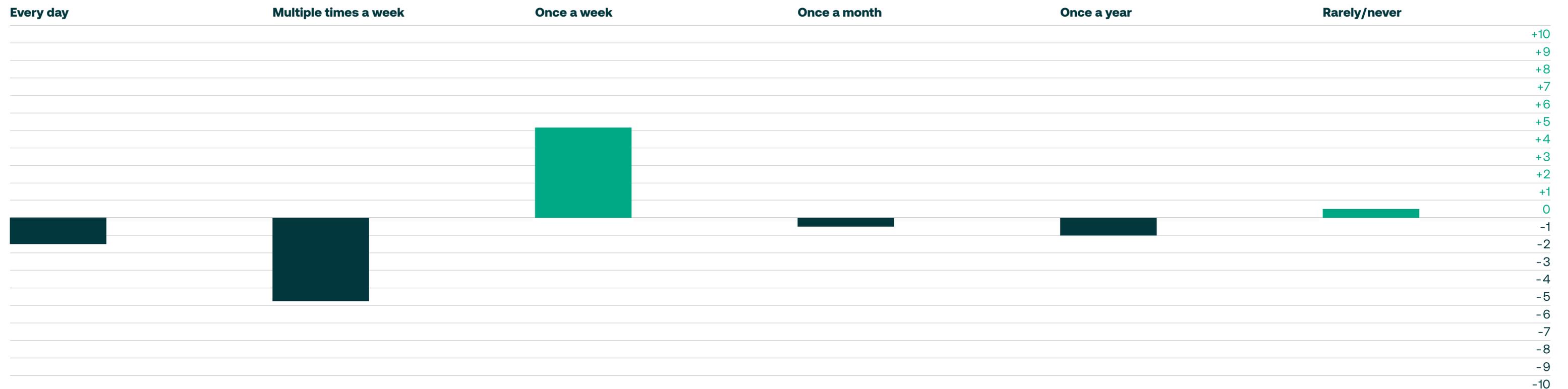
One thing in common for all, however, is a clear wish to decrease the use of the car (again, not in Norway). As we will see, this is definitely not the case with the two-wheeled classic.



**Significant
differences
between
groups**

The diagram shows the difference between how many people say; how often they use the means of transportation vs. how often they wish to use the means of transportation.

Consider transporting yourself from place A to B. On average, how often would you wish to use a car?
Consider transporting yourself from place A to B. On average, how often do you use a car?



The closer to 0, the happier people are with how they use the means of transportation.

+ Want to use more.

- Want to use less.

We yearn for more cycling

It is crystal clear: Everyone would like to bike more than they do today. Men, women, younger, older, left, right, townspeople and rural residents; there are no exceptions.

Is it the dream to get healthier? Or the urge to reduce emissions? Maybe both, but the numbers are high. Around 9 percentage points more want to take the bike every day compared to how many that bike daily today.





The Swedes are most eager to change habits. 11 percentage points more want to get on the bicycle every day compared to how many that actually uses the bike every day today. Then comes the Finns (10), the Danes (9) and the Norwegians (6). The numbers are roughly the same when looking at the wish to bike more several times a week, and not just daily.

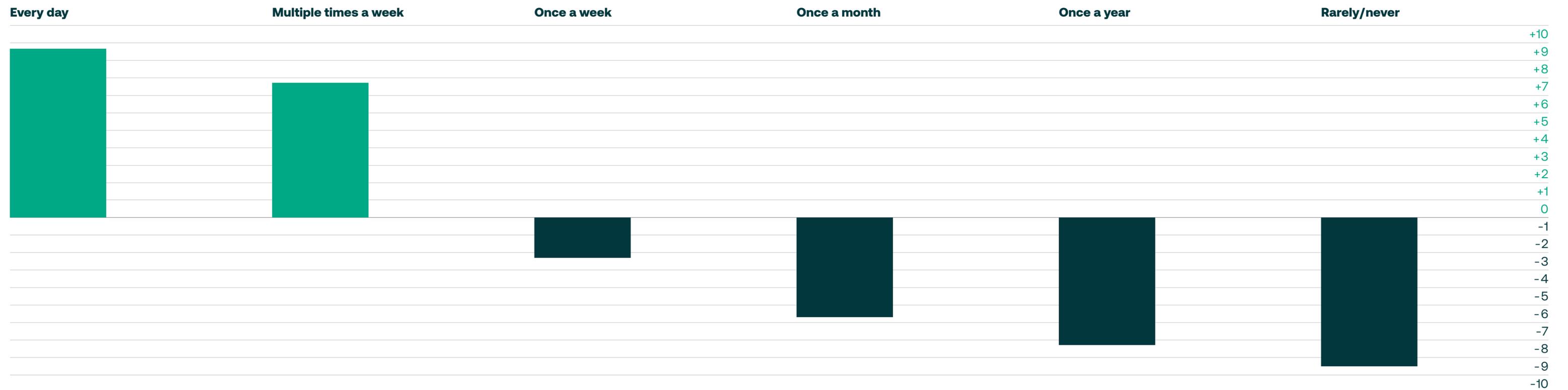
Notably, people between 35 and 49 are more eager than others to bike more every week. Also, people in rural areas have a stronger wish than most of the ones living elsewhere. A striking difference exists between women and men, even if both want to bike more. Women seem to be more interested than men.

Do politics matter? Yes. 11 percentage points more of the left-voters would like to cycle every day, compared to how many of them that actually do it today. The number for right-voters are not half of that; 5%.

Despite the differences, the bike seems to be underused. That goes for trams, buses and subways as well.

The diagram shows the difference between how many people say; how often they use the means of transportation vs. how often they wish to use the means of transportation.

Consider transporting yourself from place A to B. On average, how often would you wish to use the bicycle?
Consider transporting yourself from place A to B. On average, how often do you use the bicycle?



The closer to 0, the happier people are with how they use the means of transportation.

+ Want to use more.

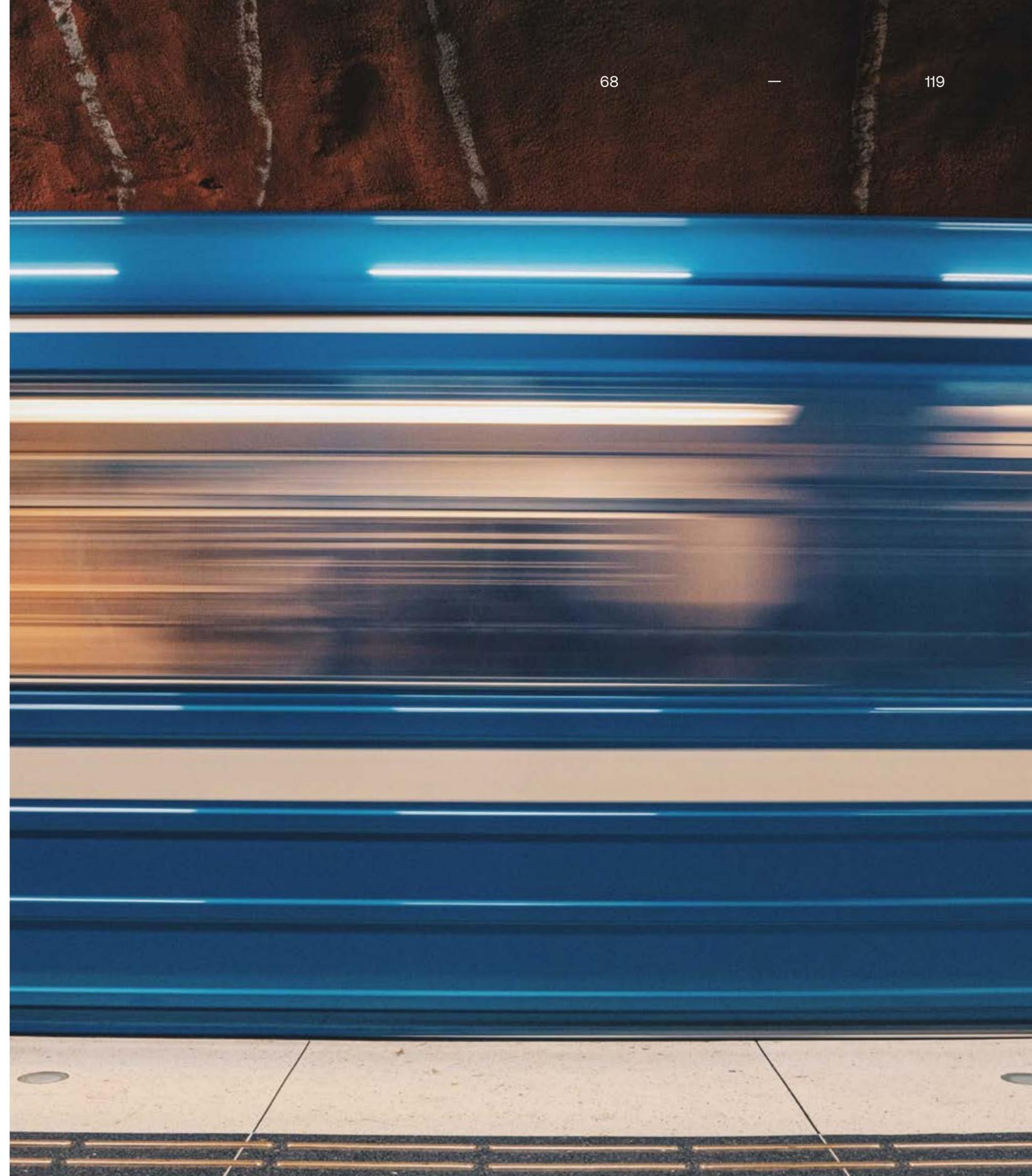
- Want to use less.

A potential for public transportation

Public transport is clearly associated with being environmentally friendly, as shown in the first section.

And maybe it is the attraction of being a slightly better, “green” citizen that we can sense in the Mobility Barometer as well.

3 percentage points more want to use public transport every day compared to how many people that use it daily today. Looking at using public transport several times a week, the figure is 5 percentage points.





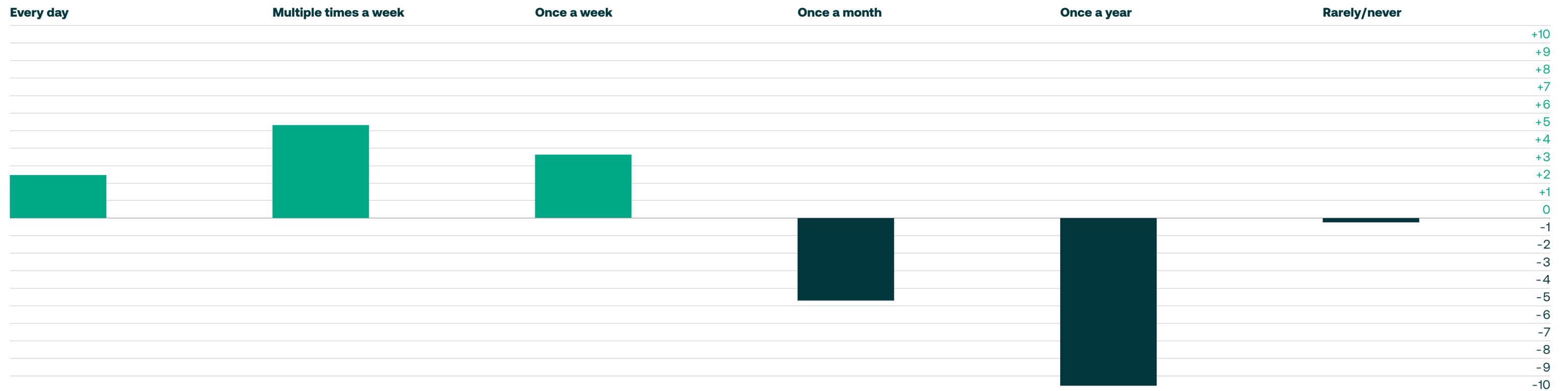
As we have seen, Swedes in general tend to be most keen on changing current habits, in good company with the Finns. That goes for public transport as well. 6 percentage points more of these nationalities want to use public transportation several times a week compared to how many that frequently use it today.

The Danes, however, are happier. Here, the difference is only 3 percentage points. In between we find the Norwegians (5)

Interestingly, the younger ones are completely fine with things as they are. Persons between 18 and 34 already use public transport most of all groups and have no desire to increase the lead. Rather, it is the middle-aged that have slightly more bad conscience. The higher the age, the greater the gap between reality and the desire to use buses and trams.

The diagram shows the difference between how many people say; how often they use the means of transportation vs. how often they wish to use the means of transportation.

Consider transporting yourself from place A to B. On average, how often would you wish to use public transit?
 Consider transporting yourself from place A to B. On average, how often do you use public transportation?



The closer to 0, the happier people are with how they use the means of transportation.

+ Want to use more.

- Want to use less.

The green revolution

Today, we are indeed in the middle of a shift where fossil fuels are being phased out. Biofuels, hydrogen, electricity and more; all major car manufacturers are focusing on greener alternatives and the electric car manufacturer Tesla has grown to become the world's largest car manufacturer by market cap.





The popularity of electrical cars

Regarding electrical cars, there is no doubt that many northerners are embracing the green shift.

On the aggregate level, the northerners are positive to the idea of owning an electric car. Only one out of four can't consider doing that. The Swedes are most positive, followed by Norwegians, Finns and Danes.

High attraction of electric cars

Would you consider renting, leasing or owning an electric car?

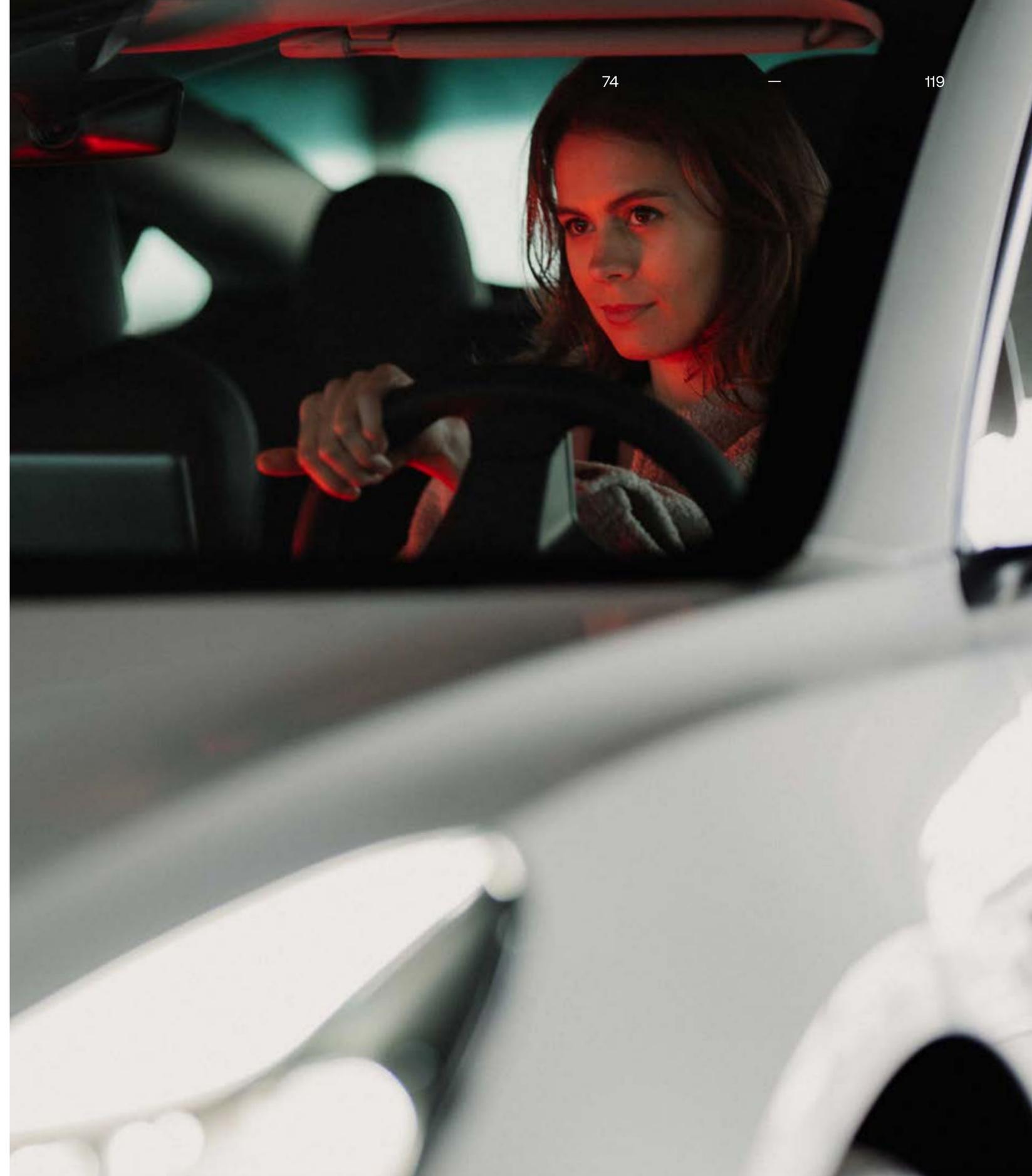
	Total	Denmark	Finland	Norway	Sweden
Rent	11%	5%	11%	10%	15%
Lease	19%	14%	17%	11%	27%
Own	39%	39%	32%	44%	39%
Can't see myself doing so	27%	29%	40%	28%	18%
Uncertain/don't know	18%	20%	15%	16%	20%

Striking differences

Norway stands out

The overall pattern is clear but looking closer, there are interesting differences. The electric car might be number two at an aggregate level for all Nordic countries.

But breaking up the numbers, Norway stands out. More Swedes than Norwegian do eager for an electric car, but more Norwegians prefer an electric car than any other type of car.



A black Tesla Model S is shown from a rear three-quarter view, driving on a paved road. The car's taillights are illuminated with a red glow. The background consists of a dense forest of green trees, suggesting a rural or wooded area. The lighting is soft, indicating dusk or dawn.

The Norwegian position is unique. It is also in line with the official Norwegian strategy. For years, rules and regulations has aimed at encouraging Norwegians to buy and use electric cars. These cars are exempted from value added tax, for example, as well as certain environmental pollution taxes.

Looking closer at the patterns, there are also an interesting connection to age. Almost 90% of the youngest group between 18 and 34 are positive to electrical cars. The higher age, the less support; 48% of the ones over 65 are attracted by an electric car. The other age groups are in between.

A similar pattern can be seen depending on where you live. The bigger the city, the more positive attitudes. Eight out of ten in the major cities could consider renting, leasing or owning an electric car. In rural areas, the number is six out of ten. We will take a closer look at explanations later but just as with public transport, attitudes are clearly connected to aspects of accessibility.

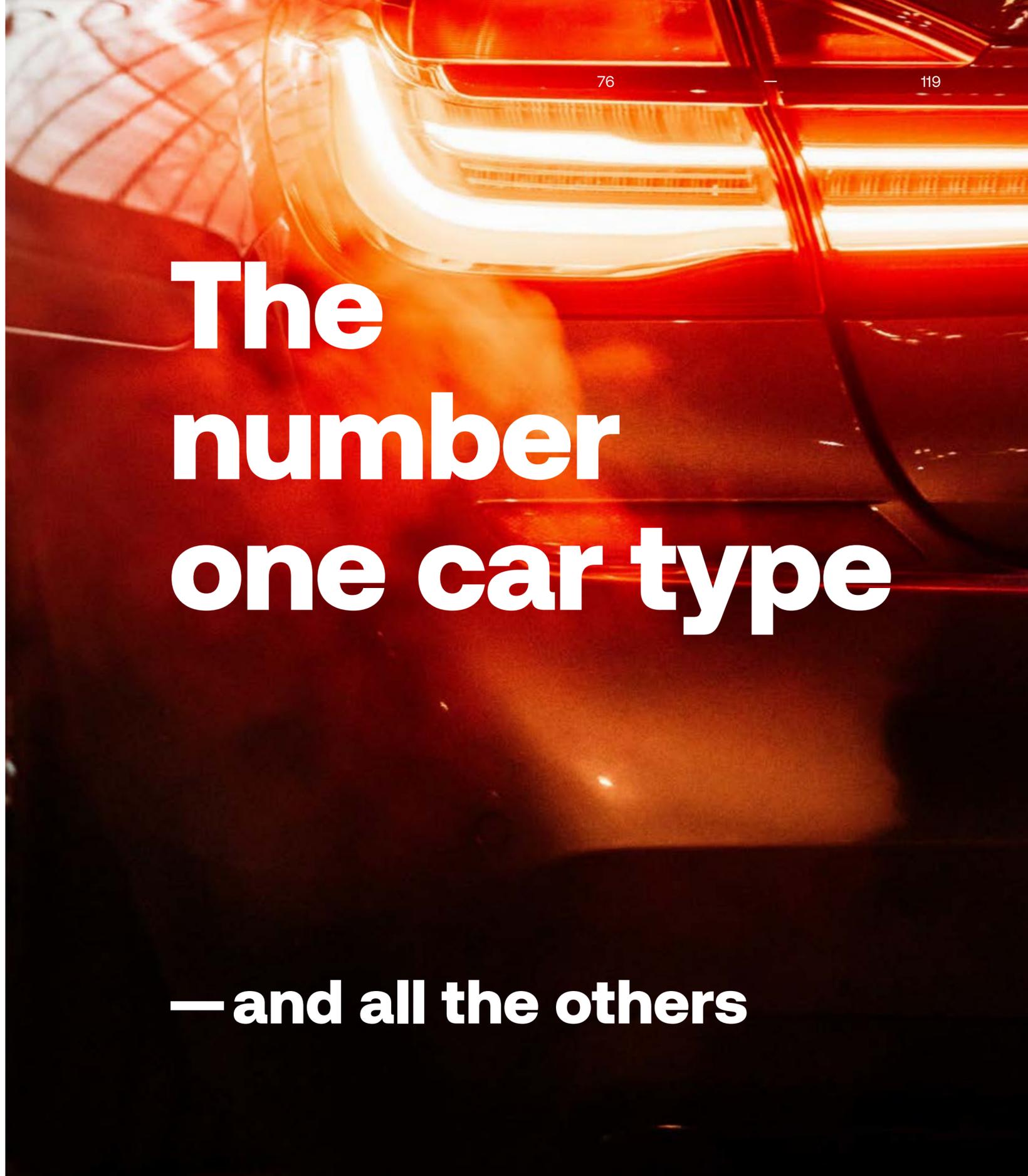
Gasoline

Even though electrical cars are highly popular, traditional gasoline cars are still leading the race on an aggregate Nordic level. Gasoline cars are clearly the number one, despite rising prices at the pump during 2022.

Only one out of five rules out the thought of renting, leasing or owning a gasoline-powered car. And we do want to own them; A clear majority in all countries prefer to own; again, except in Norway.

Swedes are most positive towards gasoline powered cars. After Swedes comes Finns, Danes and Norwegians.

Also, men are more attracted than women to gasoline cars. And the ones living in rural areas are clearly more positive than major city dwellers.



76 — 119

The number one car type

— and all the others

The traditional choice is still number one, except in Norway

Would you consider renting, leasing or owning a gasoline car?

	Total	Denmark	Finland	Norway	Sweden
Rent	8%	3%	7%	7%	12%
Lease	11%	10%	13%	7%	13%
Own	57%	55%	61%	43%	63%
Can't see myself doing so	21%	24%	22%	33%	13%
Uncertain/don't know	14%	14%	10%	16%	14%

Plug-in Hybrid

A Plug-in Hybrid is a car that use batteries to power an electric motor and another type of fuel to power a combustion engine.

Batteries can be charged using wall sockets or by using the breaks. Being more environmentally friendly than a traditional car, Plug-in Hybrid has gained popularity in several markets, also in the Nordics.

The Plug-in Hybrid is the third most popular car type. Almost four out of ten say yes when they are asked if they could consider owning one.

Swedes are clearly more positive than others, men are more positive than women, as well as people living in cities.



The Plug-in Hybrid is number three

Would you consider renting, leasing or owning a plug-in hybrid?

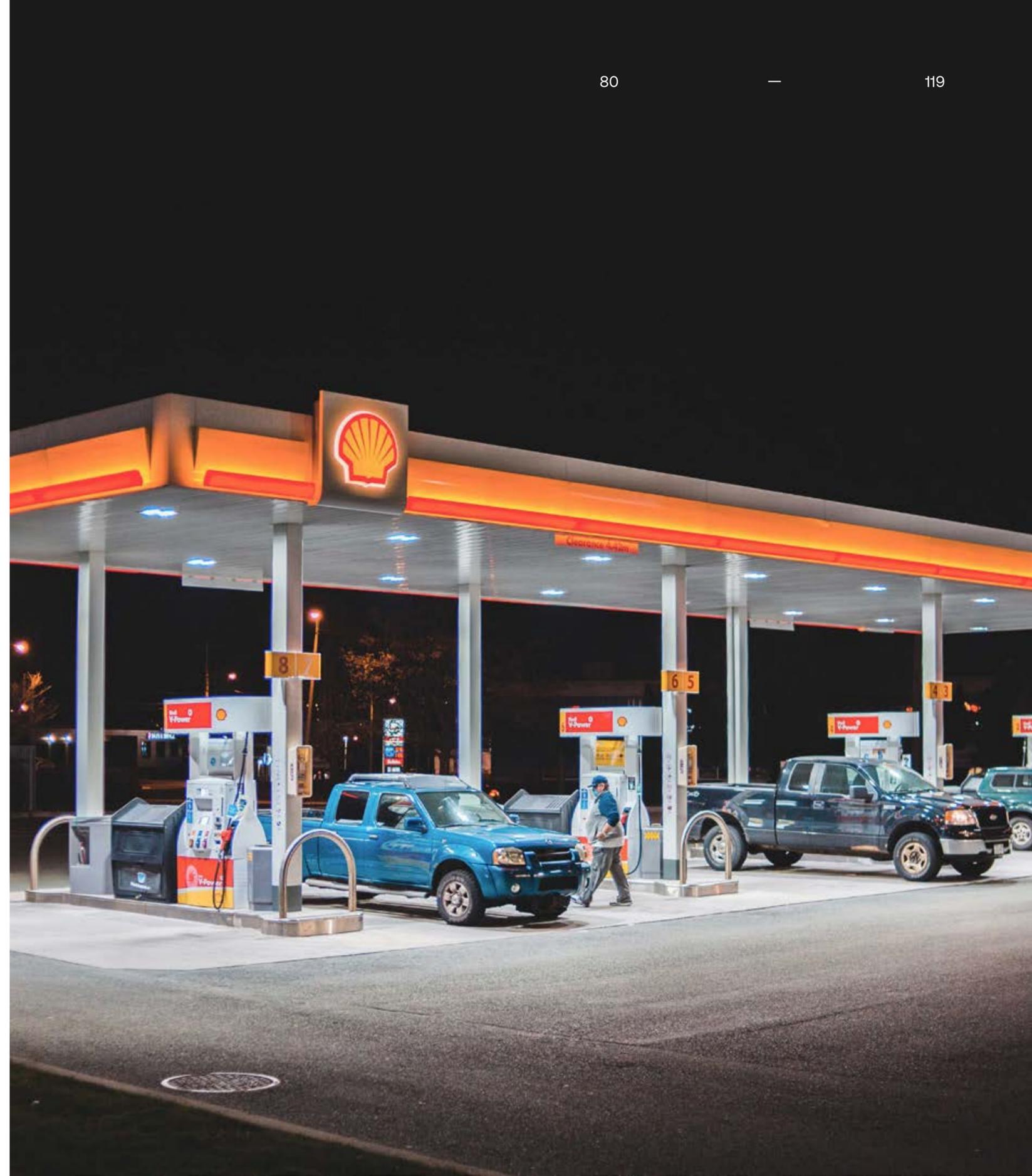
	Total	Denmark	Finland	Norway	Sweden
Rent	9%	3%	8%	8%	13%
Lease	16%	10%	14%	10%	24%
Own	37%	32%	33%	35%	44%
Can't see myself doing so	30%	39%	39%	33%	18%
Uncertain/don't know	20%	21%	18%	19%	21%

Diesel

Extra interesting is the number four; Diesel cars. This type of car is a real classic and still popular but has lost some ground of various reasons.

Today, every second person could consider renting, leasing or buying one. The strongest supporters live in Sweden and Norway. Opinions in Norway and Denmark are more negative, and more than half of the population cannot see themselves opening up their wallets for a diesel-powered car.

Notably, the ones in the countryside are far more interested than others. Every second person in rural areas are willing to own a diesel car; twice as many as the ones living in major cities. The same pattern is true for right-voters, who are significantly more attracted by diesel cars than left-voters.



Diesel cars has been more popular than they are today

Would you consider renting, leasing or owning a diesel car?

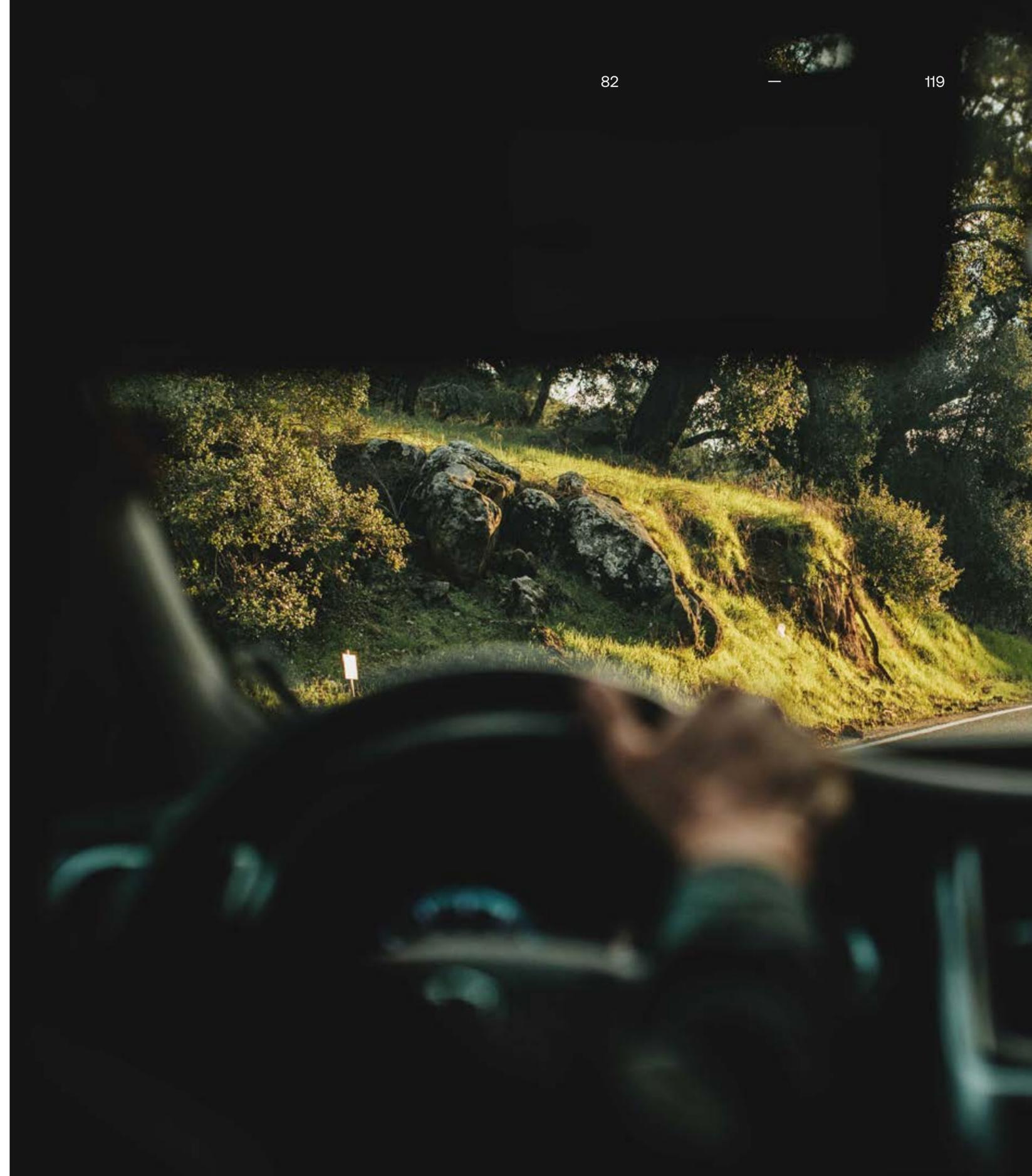
	Total	Denmark	Finland	Norway	Sweden
Rent	7%	3%	6%	7%	10%
Lease	8%	6%	7%	5%	12%
Own	34%	25%	30%	40%	40%
Can't see myself doing so	41%	53%	51%	37%	30%
Uncertain/don't know	17%	17%	13%	16%	20%

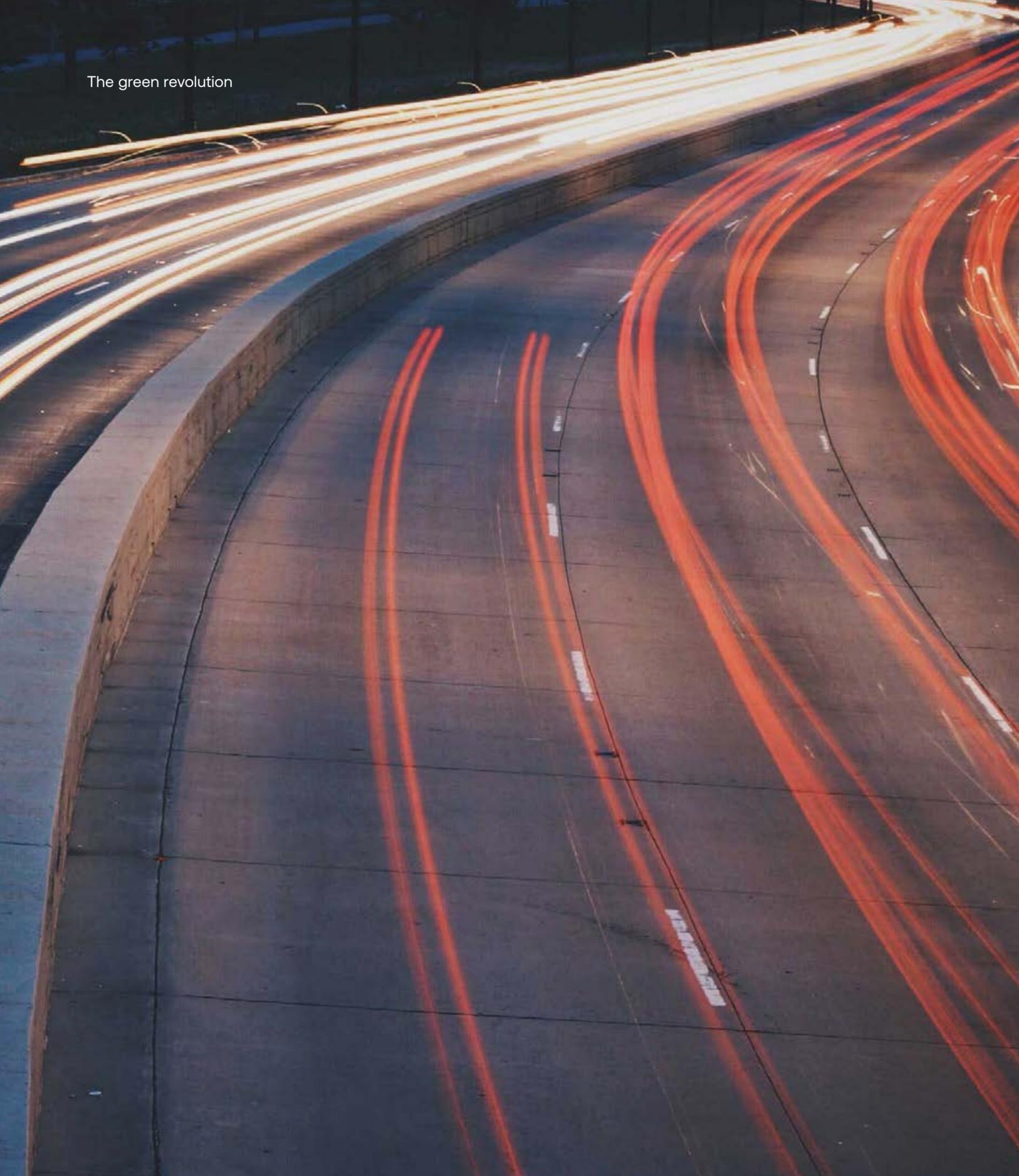
Hydrogen and ethanol

Cars powered by hydrogen are not that common, which has an effect on people's attitudes. There is a big uncertainty among the Nordic people around hydrogen cars.

14% could consider owning a hydrogen car, and almost every second person say no. The support is low in all countries, but there are some differences.

Finns are slightly more attracted than others; the interest is lowest in Norway. Looking at certain groups, men are more positive than women, as well as younger compared to older.





The pattern is similar for ethanol powered cars, even if there are bigger country differences with Sweden and Norway being the most positive towards them. Ethanol is a more environmentally friendly than gasoline or diesel and was widely popular for several years.

However, sales have decreased and today only one out of four are prepared to rent, hire or buy an ethanol powered car. Every second person can't see themselves choosing this kind of car, making it number five in the Nordics.

Lower interest for hydrogen cars

Would you consider renting, leasing or owning a hydrogen car?

	Total	Denmark	Finland	Norway	Sweden
Rent	6%	3%	6%	5%	7%
Lease	8%	6%	9%	6%	10%
Own	14%	13%	19%	11%	13%
Can't see myself doing so	46%	51%	51%	53%	37%
Uncertain/don't know	31%	30%	22%	27%	38%

Lower interest for ethanol cars

Would you consider renting, leasing or owning a ethanol car?

	Total	Denmark	Finland	Norway	Sweden
Rent	6%	2%	5%	4%	9%
Lease	6%	4%	8%	3%	8%
Own	14%	8%	19%	7%	17%
Can't see myself doing so	50%	55%	51%	60%	41%
Uncertain/don't know	29%	32%	23%	27%	32%

Problems and worries

Or why the electric car is still not number one

Even if electric cars are popular, it's not the most popular type of car. People are divided. The survey shows that a significant minority is skeptical; 27% of all could not consider renting, buying or owning an electric car. Finns are most negative with four out of ten rejecting the idea. This is more than double than the number in Sweden.

The question is why? There are several interesting explanations and concerns. Some of the most interesting:



The price

Many wishes that they would have more money, nothing new about that. But electrical cars often have a very hefty price tag. This is the most common reason for the sceptics not to drive one. One out of three simply can't afford an electric car. In Sweden and Finland, the number is around 40% of the ones that reject the electric car, which is significantly higher than in Denmark and Norway.

Short reach

Living in the countryside also often mean travelling long distances. The same goes for everyone who lives in one place and has the summerhouse, friends or relatives in other regions. Electrical cars often have a good reach, but not good enough according to 31% of the Nordic people. This is more or less what all groups think.



Too few charging stations

Related to limited range is the key question of how to charge the car. Around three out of ten indicates this as a reason for not thinking of electric cars as an alternative.

Swedes are most negative with 36% lacking enough charging stations, followed by Danes (31%), Finns (27%) and Norwegians (21%). Not surprisingly, twice as many in rural areas complain about this compared to people in major cities; 40% versus 20%.

Green worries

Many people think of the electric car as a green means of transportation without dirty smoke from the exhaust pipe.

But people also reject this description. 16% state "other reasons" for not considering an electric car, where concerns about electric car's negative environmental impact are common. There is a particular concern about the batteries, which are made of minerals.

As some of the critics said:

"The batteries can't be reused, and they can catch fire."

"Electric cars do no good for the climate at all."

"Their positive impact on the climate is clearly overestimated."

"The batteries are environmental bombs."



High electricity prices

Electricity prices have surged during 2022 and caused problems for many companies and households. This price rally is also an important reason for skeptics not to drive an electric car. One out of five indicates high electricity prices as a reason. In Sweden, the figure is 24%, which is the highest level of all countries.

We need to change attitudes

To make electric cars the number one for everyone, the problems and worries simply need to be addressed.

When asking the electriccar-sceptics, they want cheaper cars that can run longer, more and faster charging stations, and lower electricity prices.

The truth about what makes people hesitant about electric cars

You answered that you can't see yourself renting, leasing or owning an electric car. Why?

	Total	Denmark	Finland	Norway	Sweden
High electricity prices	20%	18%	18%	20%	24%
Can't afford to	34%	26%	42%	23%	40%
Safety concerns	5%	5%	4%	7%	6%
Don't have a driver's license	17%	16%	16%	17%	17%
Not enough charging stations	29%	31%	27%	21%	36%
Can't drive far enough with it	31%	31%	27%	34%	34%
Charging stations that exist are too slow	15%	17%	12%	17%	13%
Available vehicles doesn't fit my need	19%	14%	21%	24%	16%
Not enough knowledge	13%	16%	12%	9%	15%
Other reason	16%	13%	14%	20%	16%

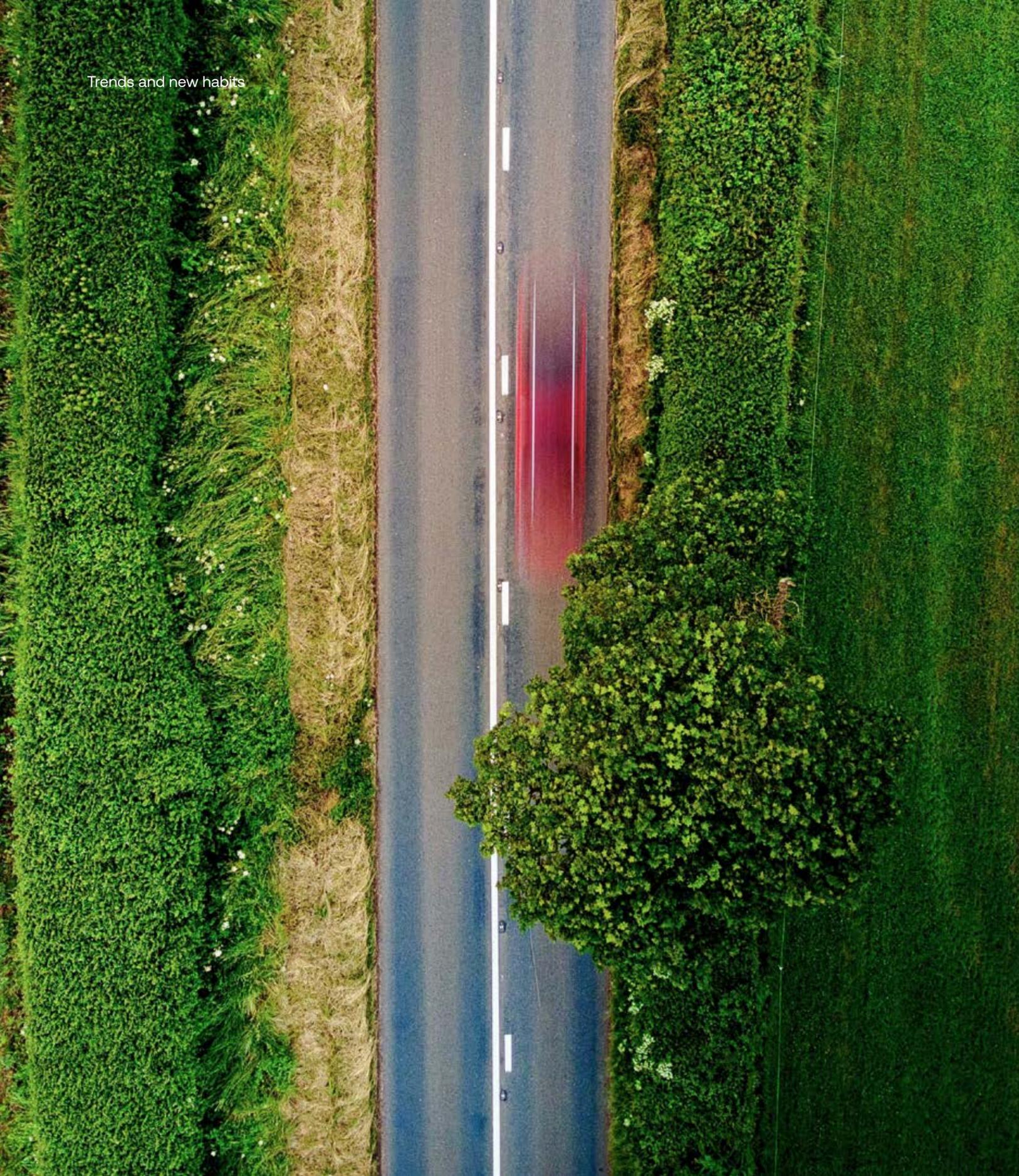
Trends & new habits

There are numerous examples of new ideas with huge impact.

Some of them change our lives fast, others need more time. One mega-trend is the fast-growing interest for electric cars. But there are also other interesting new habits connected to mobility worth having a closer look at.

One trend is car sharing. Instead of owning your own car, you could share it with others. Many car sharing services has seen the light of day in recent years, especially in cities, as a part of a larger shift towards a “sharing economy”.





Looking closer at the Nordic countries, this trend seems to be at the beginning. 8% of all use a car sharing service often or sometimes. A vast majority, 84%, have never used them. The pattern is similar in all countries.

However, car sharing has a clear potential to become more prevalent in the future, looking closer at who actually use them.

One out of four between 18 and 34 use car sharing often or sometimes. This is significantly more than other age groups. The comparable figure is 7% for the ones between 35 and 49. Notably, zero percent of all people over the age of 50 use car sharing services often, only 3 percent do so sometimes. Also, a mere 1% of all over 65 use car sharing services from time to time.

Many has never used a car share-service

Have you ever used any car sharing-services?

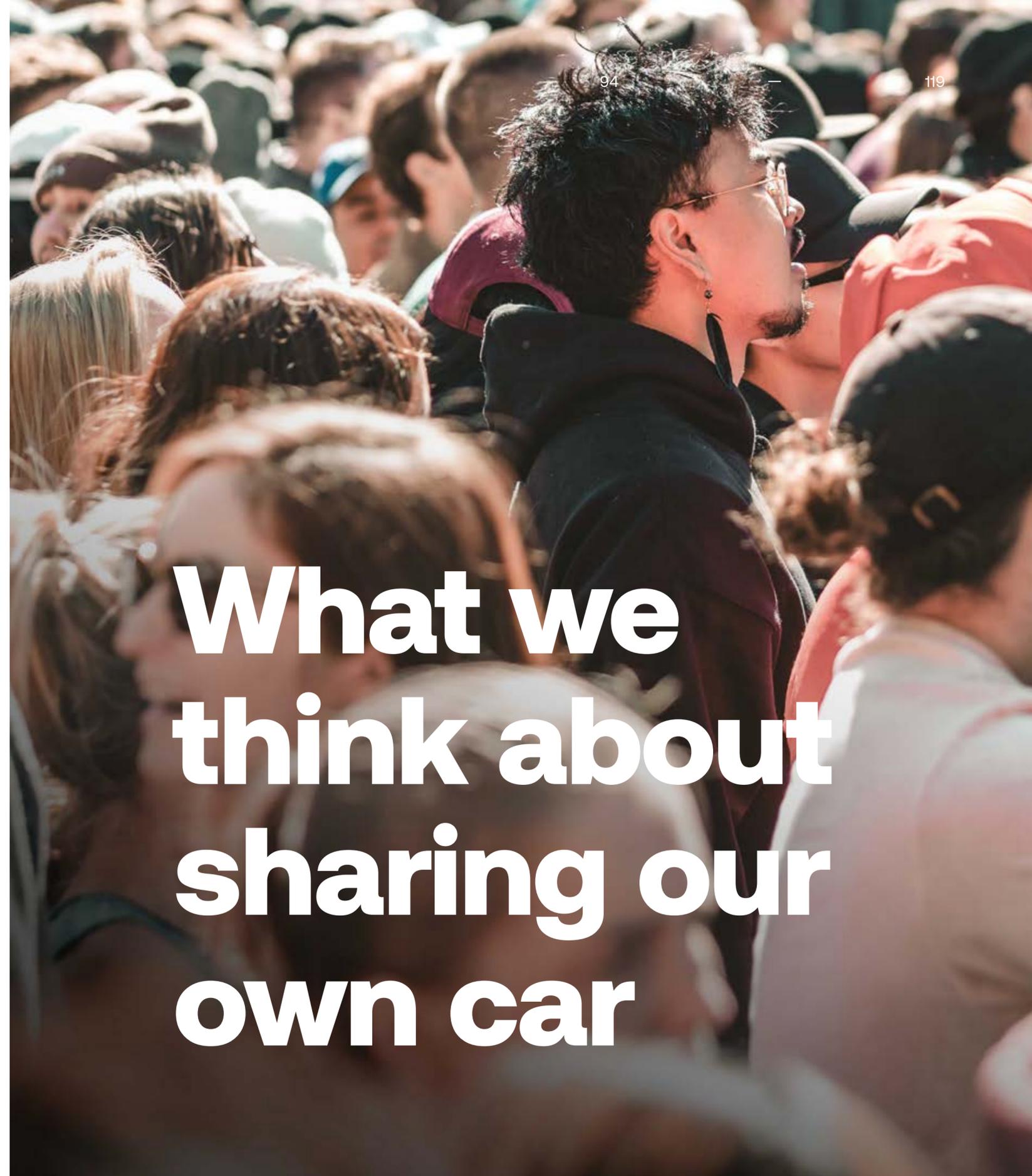
	Total	Denmark	Finland	Norway	Sweden
Yes, I often use them	2%	1%	1%	3%	3%
Yes, I use them sometimes	6%	8%	5%	7%	6%
No, but I've used them in the past	5%	5%	4%	5%	6%
No, I've never used them	84%	85%	88%	83%	82%
Uncertain/don't know	2%	1%	2%	2%	2%

The low use of car sharing services seems to be mirrored in our attitudes towards the idea of sharing our own car.

One out of five can see themselves sharing their own car with others. This goes for all countries; the differences are small.

Again, younger are clearly more positive than others. Every third between 18 and 34 are willing to let someone else borrow their car. Between 50 and 64, the figure is 13%, and even lower if you are older than 65 (11%).

Interesting differences can also be found looking at where people live. The ones living in cities are significantly more positive than the ones living in small towns or rural areas. One out of four in major or medium sized cities can see themselves sharing their own car with others. In the countryside, only one out of ten do.



**What we
think about
sharing our
own car**

A minority are willing to share their car with others

How much you agree/disagree with the statement “I can see myself sharing my car with other people”

	Total	Denmark	Finland	Norway	Sweden
Strongly agree	4%	3%	5%	5%	5%
Agree	15%	13%	15%	13%	16%
Neither agree nor disagree	18%	18%	20%	18%	18%
Disagree	23%	24%	24%	23%	23%
Strongly disagree	30%	34%	31%	31%	27%
Uncertain/don't know	9%	8%	6%	10%	11%

Most car sharers live in cities

I can see myself sharing my car with other people

	Major city (100 000+)	Medium sized city (50 000-100 000)	Small city (10 000-50 000)	Rural area (<10 000)	Other
Strongly agree	5%	7%	4%	2%	0%
Agree	18%	18%	10%	9%	25%
Neither agree nor disagree	20%	17%	18%	17%	20%
Disagree	22%	22%	23%	27%	17%
Strongly disagree	24%	28%	34%	38%	34%
Uncertain/don't know	10%	9%	11%	6%	5%

Thoughts about smarter car services

When streaming a film or a soundtrack, you are probably familiar with getting suggestions of what to consume next. The tips are based on your individual user history. The idea is to improve the service, help you, and make you appreciate the service even more.

This idea of data analysis is also relevant to the use of cars. By knowing more about how people drive, the user can get suggestions and tips on things like how to make the car last longer or how to improve safety.



Mixed emotions on data collection

Is it ok if the car collects data on the driver to improve services that can be provided to them? This question was asked to all 4 000 respondents, and again, the Nordic people is divided. One out of four think it is ok to share personal data, and four out of ten say no. Many either agree or disagree to the statement that it would be ok.

As we have seen with car sharing, the ones between 18 and 34 are more open than others. One out of three think it is ok with data collection, compared to around one out of five for persons that have lived longer.

There is also an interesting difference between men and women. 29% of men are ok with data collection, compared to 20% of all women.

One out of four are willing to share data

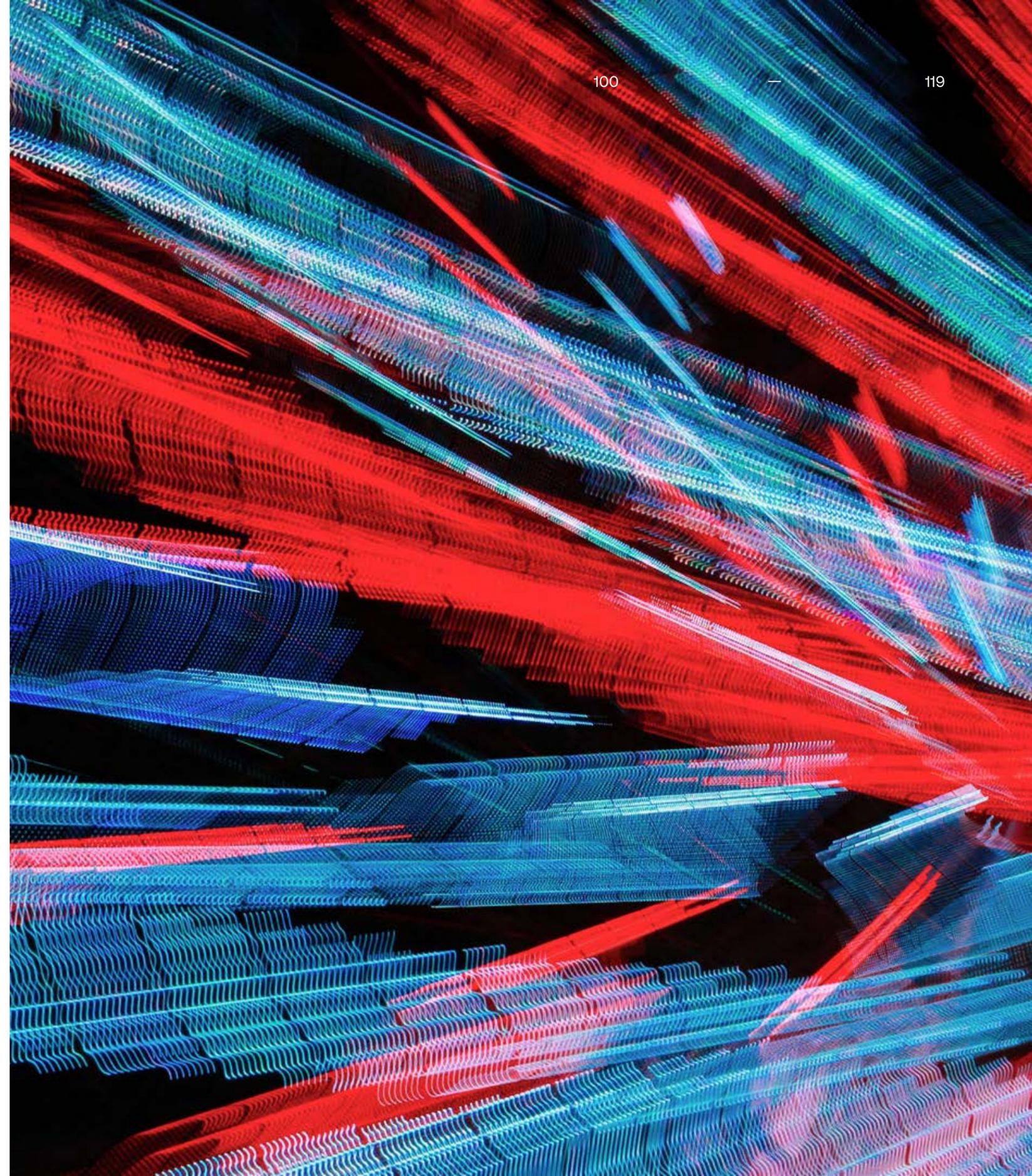
It's ok if my car collects data on me to improve services that can be provided to me

	Total	Denmark	Finland	Norway	Sweden
Strongly agree	6%	7%	4%	7%	5%
Agree	19%	20%	16%	18%	21%
Neither agree nor disagree	28%	28%	27%	29%	28%
Disagree	19%	17%	20%	18%	18%
Strongly disagree	18%	18%	24%	18%	16%
Uncertain/don't know	10%	10%	9%	10%	11%

What we want out of data collection

Fuel prices are soaring, and we might have a case of bad conscience driving our gasoline powered car, thinking about the environment. In short, there are several reasons to drive as fuel efficient as possible.

Advice on how to drive more fuel efficient is also what we would value the most based on the information our car can collect. Almost every second person indicates this.





Many would also appreciate better service; one out of four say so. There are some differences between countries, where Finns are more interested (46%) than Norwegians (45%), Swedes and Danes (34% respectively).

In addition, people say they would benefit from improving the accuracy of their GPS, and to get tips on how to drive more safely.

In sum, economic reasons seem to be key to allow a third party to collect data on how we drive.

We want to get smart advice in return

What type of services would you value the most based on the information that your car can collect?

	Total	Denmark	Finland	Norway	Sweden
Improving accuracy for my GPS	35%	41%	28%	39%	34%
Getting health advice	6%	5%	8%	6%	5%
Getting better service for my car	39%	34%	46%	45%	34%
Getting more accurate ads	4%	2%	3%	5%	5%
Sharing rides on social media	5%	3%	6%	4%	6%
Get advice on safer driving	31%	30%	37%	30%	29%
Get advice to drive more fuel efficiently	46%	51%	45%	43%	44%
Other reason	4%	5%	4%	3%	4%
Uncertain/don't know	20%	20%	19%	19%	22%

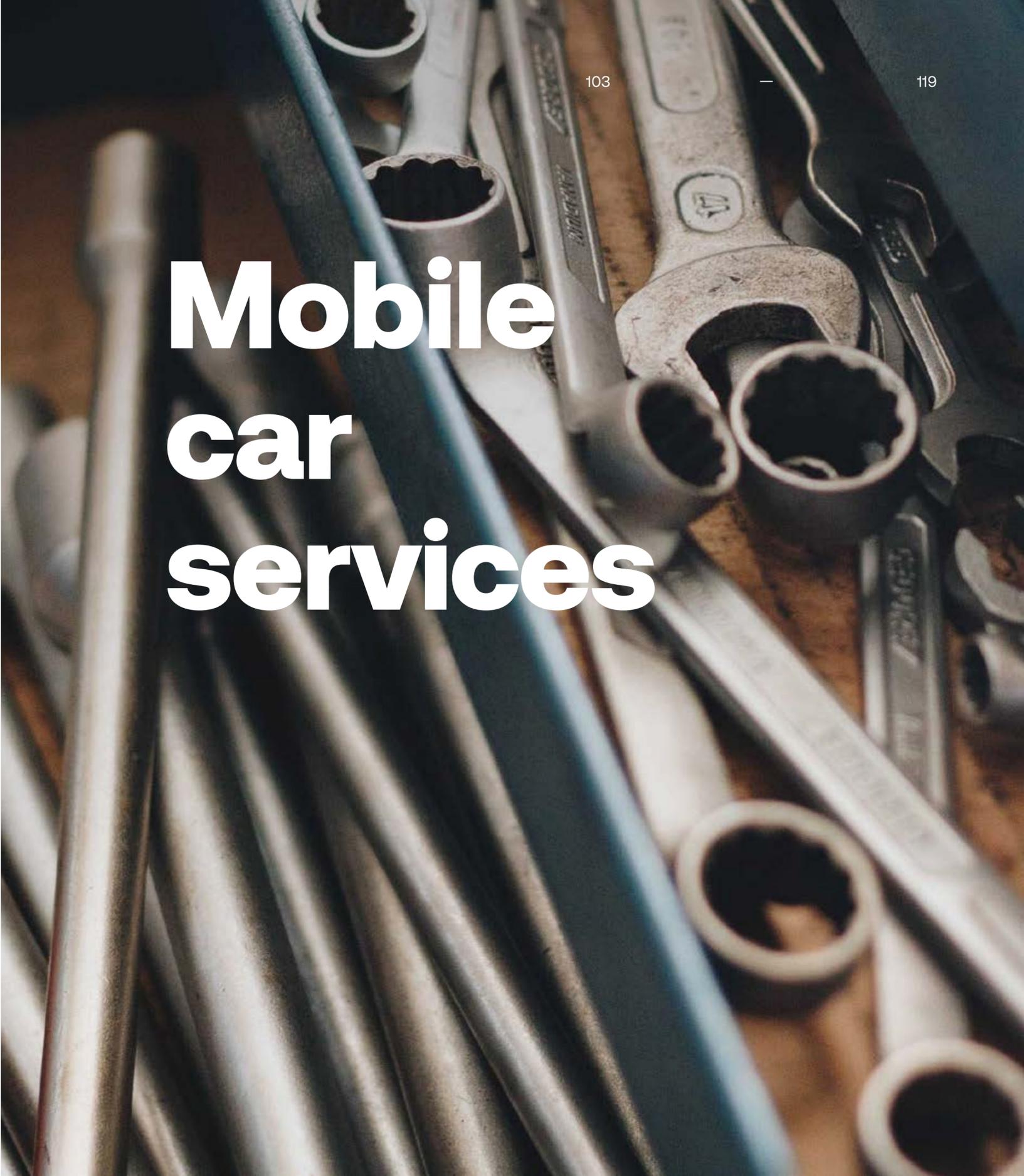
If you have problems with your car, you take it to the workshop.

This is how it works. Well, not necessarily, not anymore.

A new trend is mobile car services, where the mechanic come to you rather than the other way around. One out of four in the Nordics would prefer to service their vehicle at home or in their workplace, rather than at the workshop. Breaking up the figures, Swedes are the most interested; every third Swede would prefer this. Then comes Finns (24%), Norwegians (23%) and Danes (20%).

Still, the first choice for the northerners is having their car serviced at a workshop. A clear majority of 60% prefer to go there. Looking at having service at home, younger are more attracted than older. Slightly over 20 percent of the ones between 18 and 49 like this idea, compared to 14% for the ones between 50 and 64, and 8% for the group over 65.

Once again, the age pattern indicates that this new trend may become more widespread in the future than it is today.



Mobile car services

One out of four would like to have the car fixed at home or at work

If you could choose wherever, where would you like to service your vehicle?

	Total	Denmark	Finland	Norway	Sweden
My home	17%	17%	11%	18%	20%
My workplace	9%	9%	9%	6%	10%
A workshop	60%	60%	67%	60%	56%
A public parking garage	3%	3%	1%	3%	3%
Other reason	1%	1%	1%	1%	1%
Uncertain/don't know	10%	10%	10%	11%	11%

Younger are more interested than others

If you could choose wherever, where would you like to service your vehicle?

	18 – 34	35 – 49	50 – 64	65+
My home	23%	21%	14%	8%
My workplace	13%	13%	8%	1%
A workshop	46%	51%	66%	80%
A public parking garage	6%	2%	2%	1%
Other reason	0%	1%	1%	2%
Uncertain/don't know	12%	11%	9%	9%

The future of the car

And the concluding lesson from Norway

In recent years, there has been a radical green shift in the automotive industry towards more environmentally friendly engines and solutions. The general perception is that this change is necessary and must accelerate to reduce emissions and ensure a healthy, sustainable climate.

The shift towards increased sustainability is of course a global trend and not only happening in the automotive industry. Many companies, industries, states and ordinary people are aiming at becoming more sustainable.





Most of us takes the car to the future

A clear majority of the Nordic people say yes.

They think that cars will be a big part of the future. As stated in the report, six out of ten share this opinion at the aggregate Nordic level.

There is a majority in all groups; men, women, young, old, city dwellers, left, right, people living in the countryside - everyone (except the ones that don't have a driving license, that's the only exception). Only one out of ten disagree with the statement that the car will have a big part of the future.

Looking more closely, men are more convinced than women; 66% of men believe in a future where the car has a large part while 56% of women do. The car also has its strongest support in the countryside. Seven out of ten in rural areas believe in a future where the car has big part.

But the most interesting comparison is between nationalities. Finns are indeed supportive of the car in the future, but not as much as the other nationalities. 52% of Finns think the car has a bright future, compared to 58% in Denmark and 63% in Sweden.

Again, Norway stands out; 69% of Norwegians think positive about cars. That is clearly the strongest support.



The northerners have faith in the car

I think that cars will be a big part of the future

	Total	Denmark	Finland	Norway	Sweden
Strongly agree	21%	19%	15%	30%	22%
Agree	39%	39%	36%	39%	42%
Neither agree nor disagree	22%	25%	27%	16%	20%
Disagree	7%	4%	10%	5%	7%
Strongly disagree	3%	3%	4%	3%	3%
Uncertain/don't know	7%	9%	8%	7%	6%

Why Norway stands out

and what it may teach us

Earlier in this report, we compared wants and behavior in the Mobility Indicator. We scrutinized the difference between how people transport themselves from A to B, and how they desire to transport themselves from A to B.

One key learning was that Finns, Swedes and Danes would like to drive slightly less than they do today. But not Norwegians. They are more or less happy with their current driving.



We have also seen that Finns, Swedes and Danes have gasoline powered cars as the number one choice. But not Norwegians. In Norway, the electrical cars are on top of the list.

In addition; Finns, Danes and Swedes do believe in a future where the car has a big part. But they are not close to Norwegians, who are the strongest car-supporters of all looking into the future.

These findings are interesting when analyzing the facts about what we are looking for when we choose means of transportation. As the Mobility Barometer reveals, we desire availability, comfort, speed, price and reliability; factors that matches our associations with the car more or less perfectly. Environmental reasons come first at seventh place.

That lead us to the Norwegian strategy.

As other countries, Norway want to reduce emissions from cars. The ambitious strategy of encouraging people to shift to electric cars give several interesting results. Emissions are being reduced, car-users are satisfied, and the drivers also believe in the future of the car. In short; the common use of electric cars today seems to convince the Norwegian people that it is possible to combine driving with a sustainable future.

There are pros and cons about the Norwegian strategy, and one may have different views about it. But regardless of one's opinion, Norway has taken a leading position among countries that try to enable long-term sustainable use of cars.



Still, the electric cars of today are not perfect, nor the infrastructure around them. Many feel electric cars are simply unsuitable or impossible to use in everyday life. As seen earlier, there are several challenges to convince more people to rent, lease or buy an electric car. As seen, there are also worries around their environmental impact.

Asking the Nordic people, we get some answers on how to address these issues. The electric cars have to be cheaper, and they have to have a higher mileage. There need to be more and faster charging stations. In addition, the electricity prices can't be too high.

These are all interesting conclusions that may lead us forward. That said, it may be wise to remember the famous words of the American author Mark Twain;

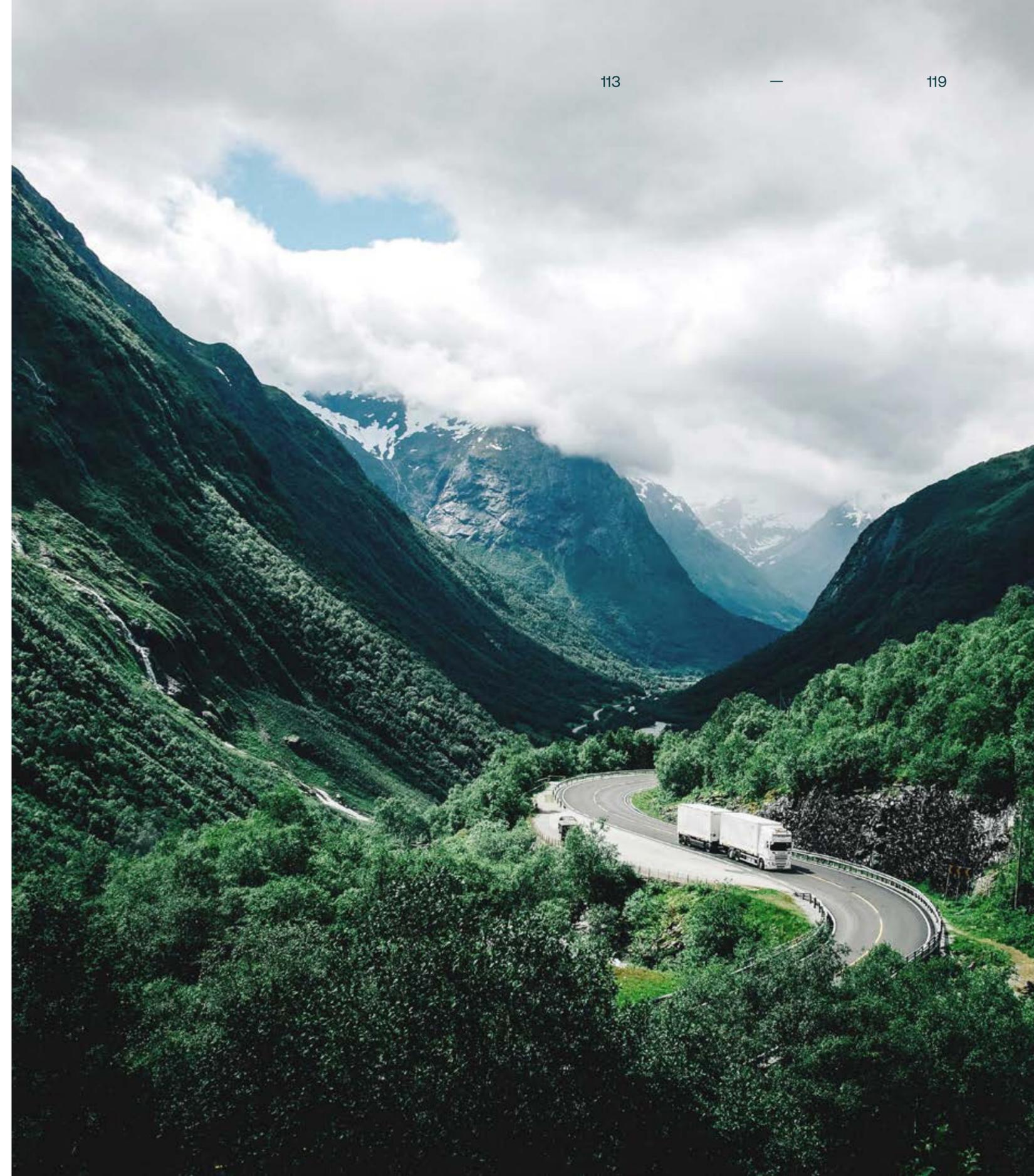
“It's difficult to make predictions, especially about the future”

History has shown that new, unexpected technologies can be developed rapidly and that existing ones can be refined. In conclusion, we simply do not know what will appear around the corner.

What we do know is that the need for mobility is timeless. We will continue to transport ourselves; visit friends, go to work, pick up our grandchildren and escape on vacation.

To do this, we will use vehicles, although the technology in them may change.

We will learn more about the future as early as 2023, when the Mobility Barometer will return.



This is MEKO AB

**Formely
Mekonomen Group**

We enable mobility — today, tomorrow and in the future

We often talk about mobility, but what does it mean? If you pick up a dictionary you can read something like, “the ability to move or be moved freely and easily”.

At MEKO, “we enable mobility”, means that we shall be the best and most comprehensive partner for all who are serving and maintaining cars. We shall meet the needs of workshops and car owners in a way that is convenient for them, without them needing to look elsewhere - today, tomorrow and in the future.

We provide a timeless business concept

MEKO AB (publ.) is the leading spare parts distributor in Northern Europe, with proprietary wholesale operation and well-known workshop concepts and brands. We are market leaders in Denmark, Finland, Norway and Sweden, and among top 5 actors in the Polish market with exports to Germany, the Czech Republic, the Baltics, among others.

We focus on growth, collaboration, creating synergies and driving sustainable and digital development in our industry. Our business concept is timeless and is based on enabling mobility - today, tomorrow and in the future - as technology develops and vehicles are used in new ways. We offer a wide and easily accessible range of inexpensive and innovative solutions and products for workshops and car owners. We seek to be the car owner's first choice regardless of vehicle model or fuel.

The Group has been listed on the Nasdaq OMX Nordic Exchange in Stockholm (MEKO) since May 29, 2000.

“MEKO is the leading player in the aftermarket of spare parts and service concepts in northern Europe.

It is important that we take on an active role to drive the sustainable and digital transformation, to ensure that we meet the customers needs. Through proactive and innovative investments in all our markets, we can continue to lead the development for mobility”

Petra Bendelin,
Director of Strategy and Business Development,
MEKO AB

A sustainable business for the future

MEKO seeks to drive sustainable development in our industry.

We have taken an active role in the transformation towards a less fossil-fuel-dependent car fleet through;

- Increased availability for electric vehicle owners - offering vehicle maintenance and products also for electric and hybrid vehicles in our wide network of workshops and branches.
- Developing E+, the first electric vehicle workshop standard on the Northern European market.
- Electric vehicle training of workshops since 2012, over 2000 workshops now fulfil the standard of E+.
- Full coverage of spare parts for all common electric vehicles.
- Ongoing project to create an optimal portfolio of diagnostic equipment for our affiliated workshops.
- Ongoing project to increase our technical competence around EV batteries, in order to ensure available maintenance of batteries for EV owners.
- In line with coverage for corresponding combustion engine cars.

Our purpose is to enable mobility

The demand for mobility is timeless and constant over time.

We focus on profitable growth and creating value for our customers as technology develops and creates new opportunities. This, together with our strong concepts and well-known brands, makes us well positioned as we enable mobility today, tomorrow and in the future.



MEKO