



MEKO

The Mobility Barometer 2023

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Intro

Words from the CEO

Increasing the lead - into the future of mobility

The need of mobility is timeless – no matter the way we transport ourselves. With the insights and data from the barometer we have all the answers to what people think and feel about mobility, and how they prefer to transport themselves. Between bikes, motorcycles, electric scooters, public transportation, and cars we do see one method of transportation that stands out. Last year we concluded that the car is king. In this year's Mobility Barometer, it's clear that the car has strengthened its position.

Today we say 'electric car' but in the future, we might just say 'car'

People in general are more open to electric cars – it's the surrounding parameters that makes us hesitant. Yet, the number of electric vehicles keep rising and more people becomes electric car owner – mostly in the bigger city areas. The electric car industry continues to grow and adapt to the demands of consumers. Leading industry players in the automotive industry are switching their focus towards electrification and new players

are entering the market. Consumers want electric cars to become more sustainable, affordable and safe.

The green transition and a more sustainable future

With the knowledge from the Mobility Barometer we at MEKO continue to develop our business with new services and products. It's hard to predict the future but regardless of how car ownership might look like in the future; one thing will remain – and that's MEKO's mission to enable safe and sustainable mobility for all. And according to the barometer – most of us will be taking the car into the future - regardless of the fuel type.

Enjoy!

Pehr Oscarson
President & CEO
MEKO



This is the Mobility Barometer

The Mobility Barometer sets out to explore and explain mobility patterns in Sweden, Denmark, Finland, and Norway. 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 decision, and their wishes about personal transportation.

The report is composed of three sections. In the first one, the report focus on mobility in the Nordics as a broad concept, answering the why, who, and how of being mobile. The last part of the section also includes The Mobility Indicator, where our wishes and our actions are mapped, and how we transport

Facts about the survey

ourselves relate to how we would wish to transport ourselves. The second section digs a bit deeper and start looking at specific means of transportation. Why do we choose one over another and what explains the mobility patterns we saw in the first section? This sections also starts to really focusing on the most used mean of transportation of them all, the car.

Lastly, the green revolution and looking towards the future. The Mobility Barometer 2023 finishes with looking specifically at the attitudes towards electric cars, car-sharing, making cars last longer through servicing them and the hottest new trends in car-usage. What will the future be like, and who are leading the change?

The survey is conducted online with randomly chosen respondents over 18 years old, between the 16th and 22nd of January, 2023. 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.



SECTION

Understanding mobility in the Nordics

The Mobility Barometer sets out to answer question of mobility in the Nordic countries; Why do we need to get from A to B? Who needs to get there the most? How much are we mobile? And lastly, how are we mobile? Before we get into the details, we start with painting out the general lines of mobility in the Nordic with a broad brush.



1. Insights

These insights guides The Mobility Barometer 2023. It gives a full and detailed look on how the people in the Nordic countries choose to be mobile, and why.

- 1 Car is still king but the economy matter
- 2 Electric cars speed up in general but slows down in tougher times
- 3 Car fits the preferences and needs of the people

INSIGHT #1

1.1 Car is still king but the economy matter

The car increases the lead as the most widely used mean of transportation on a daily basis, but increasingly hard economic times has a negative effect on average car use.

Why?

The trends supporting car usage are contradictory where some speaks towards an increased use of the car while some speaks against it. On the one hand we find that more and more people are returning to their office which should lead to an increase in commuting.

On the other hand, rising interest rates and higher fuel prices are having a negative impact on the purchasing power of the average car user. The days of joyrides might be coming to an end for some people, as the car is increasingly only being used for when it absolutely must be used. Taken together, the overarching trend should be that people are less likely to use their car overall but more likely to use it on a daily basis, which is exactly what we find in the study. Car usage on a weekly basis has decreased by two percentage points while car usage on a daily basis has increased by four percentage points.

INSIGHT #2

1.2 Electric cars speed up in general but slows down in tougher times

We are witnessing the first major setback for electric vehicles. But is it a historical unprecedented set back or just a small notch in the curve?

Why?

There is no doubt about the new trend; The ever-increasing popularity of electric cars slows down as times get tougher. But is it a bump in the road or a long-lasting slowdown?

INSIGHT #3

1.3 Car fits the preferences and needs of the people

The car has the best shot of continuing to be the preferred mean of transportation, as it fits the preferences and needs of the Nordic people the most. Real car usage is nearing a perfect match with preferred car usage.

Why?

This study is crystal clear; The car ticks almost all the boxes for what we want out of a means of transportation. But at a time when fuel prices are rising, people are more likely to really think about what they use to transport themselves. This means that people only use the car as much as they want and need



2. The Mobility Barometer 2023

Last year we proclaimed that “Car is King” and that still reigns true, maybe even increasingly so this year. More and more people are using the car on a daily basis and the gap between how people want to use the car and how they use the car is shrinking. However, there are some contradictory trends where a smaller portion of people are using the car on a weekly basis. Why? Well before we set out to answer this question - which we (attempt to) do in chapter 2 - we linger a little bit longer on the general question of mobility in the Nordics.



How mobile are we?

People in the Nordics spend a lot of their time on the move, and even though we are on our separate paths in life there's still plenty of things that unites us in why and how we move. We have things to do, places to go and people to see. And we want to get to where we need to be as efficiently and pleasant as possible.

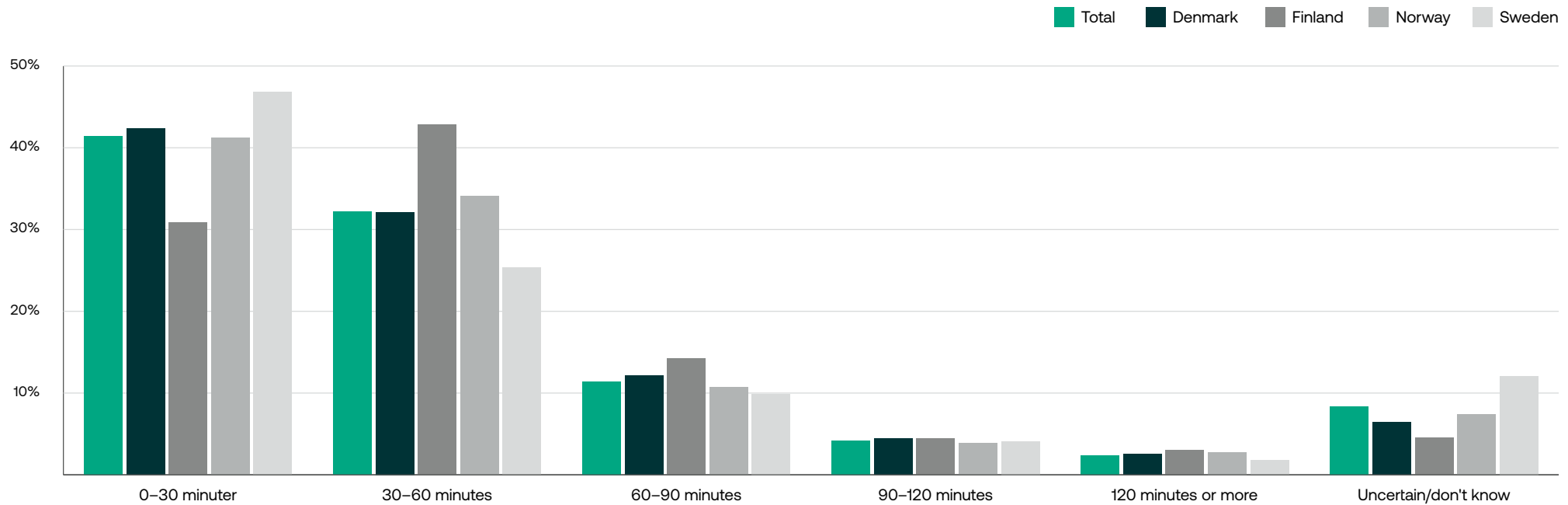
In general, almost half of people spend more than 30 minutes a day being mobile while 4 out of 10 spend less than that. Finland is continuously the country where people spend the most time transporting themselves, something that was confirmed last year as well. Meanwhile, Swedes still spend the least amount of time on the move. The difference between them is quite large, as only 31 percent of Finns spend up to a maximum of 30 minutes a day transporting themselves, while the same number for Swedes is 47 percent.



The Nordic people are on the move

Question

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



2.1 Facts on who are the most mobile

The poet Samuel Ullman famously said that “Youth is not a time of life; it’s a state of mind.”. When it comes to being on the move though, we do see that age matters.

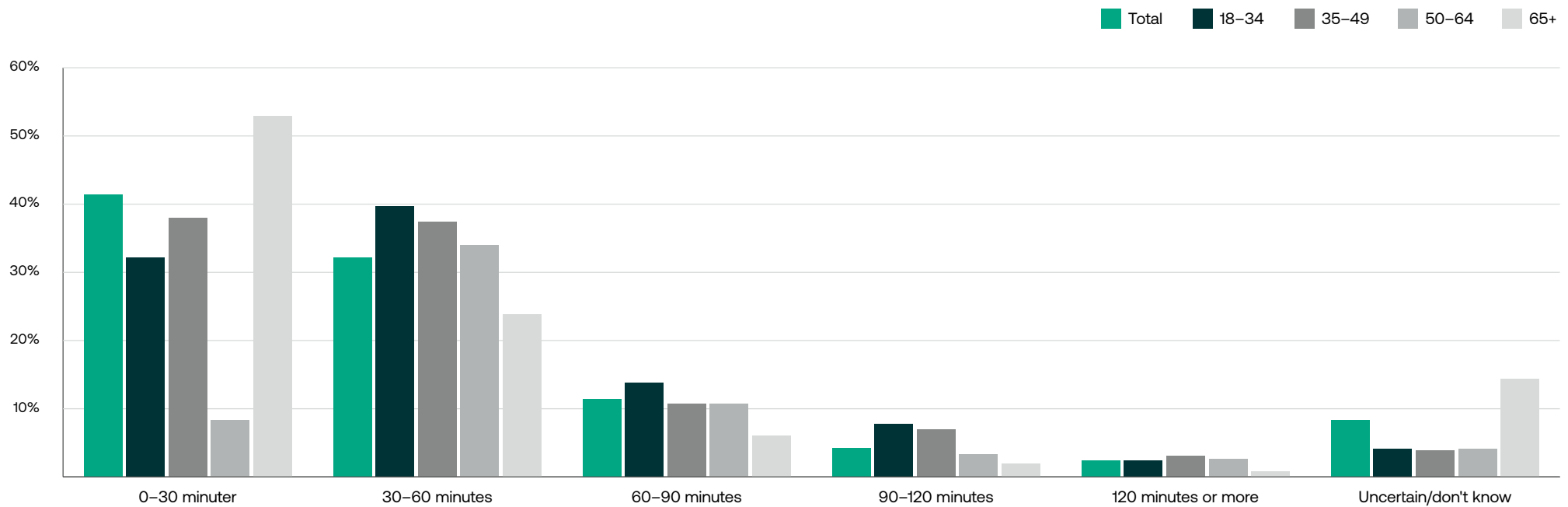
Although there’s some differences between the countries, there’s similar patterns inside every country for which group tends to transport themselves the most on a daily basis. For people between 18-34, less than a third (32 percent) spend a maximum of 30 minutes per day transporting themselves, while the same number for people over 65 is 52 percent. In addition, the older you are the less you move for every age category.



To be young and to be on the move

Question

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



2.2 Regardless of cycles, the need for mobility is stable

No big changes in how mobile we are in 2023 compared to 2022

Question

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

	Total 2022	Total 2023	Change (%)
0-30 minutes	42%	41%	-1%
30-60 minutes	34%	32%	-2%
60-90 minutes	10%	11%	1%
90-120 minutes	5%	4%	-1%
120 minutes or more	2%	2%	0%
Uncertain/don't know	7%	8%	1%

Through the pandemic, people's lives have change drastically. From being used to going into the office every day, many people have had to set up shop at home which of course affects how much they move on daily basis. In 2023, a return to normalcy has come about and this shift settled already in the Nordics in 2022, as it is clear that the time we have spent mobile is quite constant. But as will elaborated later in the study, the bigger shifts are in how we move, not that we move.





Why we are mobile

We often hear that it's about the journey and not the destination. But when it comes to our daily lives, filled with tasks and responsibilities, few people would probably agree with this.

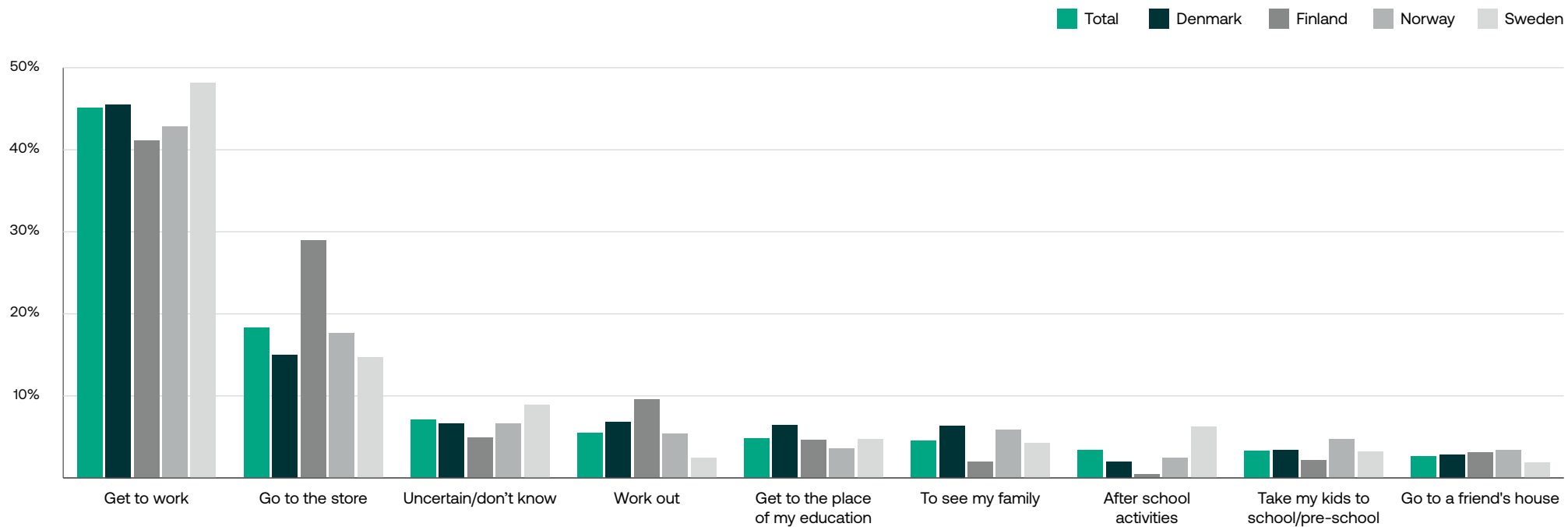
So, what is the destination for most people? Clearly, it's to get to work, which 45 percent of the people in Nordic pick as their main motivation for transportation on a daily basis. It's hard to know how much the pandemic changed this figure, and since the Mobility Barometer started in 2022 – after the pandemic started – we can't with certainty say there is a shift. But it's a fact that lockdowns have ended and we've returned to some type of normality.

For a distant second place among the options, 18 percent says their biggest motivation is to go to the store. Interestingly enough, the people in the Nordics don't show any big differences when it comes to going to work, were 41 percent Finland (the lowest) says it's their biggest motivation and 48 percent of Swedes (the highest) says the same thing. But when it comes to go going to the store, almost twice as many Finns (29 percent) says it's their prime motivation compared to people in Denmark and Sweden (15 percent).

Getting to work is the prime motivation for people to transport themselves on a daily basis

Question

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



Comment for graph: Since a new option was included in this year of the survey, no comparison can be made with the data from last year.

Where do we go when we don't have to go to work?

Question

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

	18-34 years	35-49 years	50-64 years	65+ years
Get to work	50%	64%	60%	7%
Get to the place of my education	15%	1%	1%	1%
Take my kids to school/pre-school	5%	7%	1%	0%
After school activities	3%	4%	1%	5%
Work out	5%	3%	3%	11%
Go to a friend's house	3%	2%	2%	4%
To see my family	4%	3%	3%	8%
Go to the store	8%	9%	17%	
Uncertain/don't know	4%	4%	6%	14%
Other, namely:	3%	3%	6%	10%

So, if getting to work is the most common motivation for transportation on a daily basis, what about people who for the most part have no need to go to work, i.e., the retired?

They go to the store. Looking at people over 65, 40 percent of them have answered this option compared to the 18 percent overall. It's interesting to think about this in a world where more and more goods can be ordered through an app and delivered to your doorstep within hours. Will we continue to go to the door for the experience, and not because of necessity?



3. The means of transportation; Car, bike and public transit



3.1 The car – a love affair

We've looked at why we move and who does it the most. Let's go to how we are mobile. What do we use when we need to get somewhere? Simply put, we use a car. It's clear that the car is used much more than the two other most used means of transportation. On average, almost 8 out of 10 people in the Nordics use a car on a weekly basis, which can be compared to that 1 out of 3 use a bike or public transportation during the same time period.

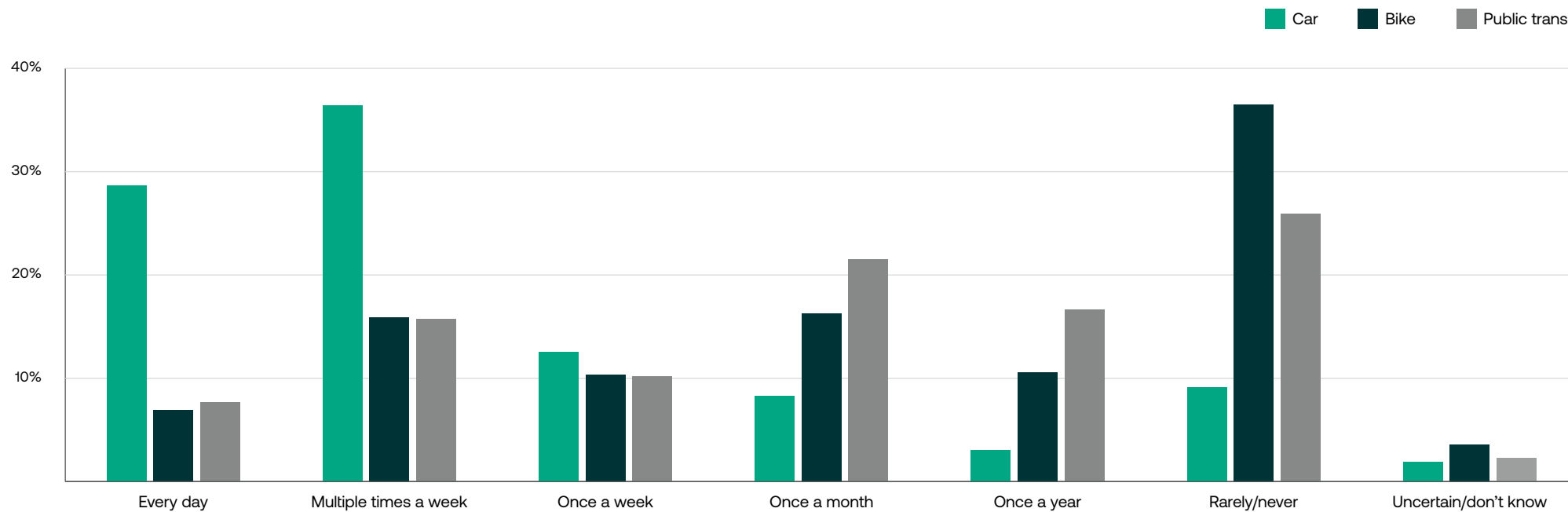
But is the car so dominant in all countries and for all groups? The quick answer is yes, the car is the most used mean of transportation in all the Nordic countries. Looking at how many use the car at least once a week, it's high numbers; 78 percent of people in Finland, 76 percent in Norway and 79 percent in Sweden.



The car and people in the Nordics – a continuing love affair

Question

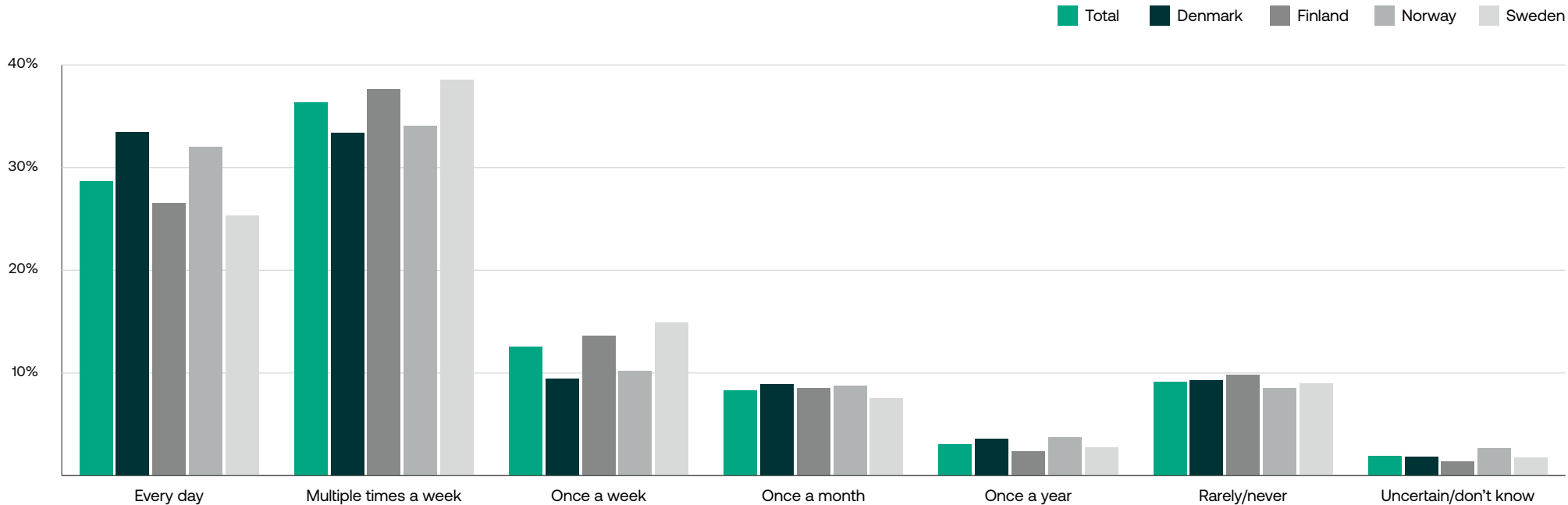
Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation?



The weekly usage of cars in the Nordic is surprisingly equal between the countries

Question

Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation? [Car]





There are also differences between men and women. 35 percent of men use the car on a daily basis compared to women where the corresponding figure is 23 percent. What's also crystal clear is that people in rural areas use the car much more. As a matter of fact, 19 percent of people living in a big city use the car on a daily basis whereas the figure for rural areas is twice as large (39 percent). This is often because of the lack of choices, where urban people usually can pick between different means of transportation but the same is obviously not true for people on the countryside. For them the car is much more a tool for survival, not only to make your life more comfortable.



Change from 2022: Costs affects how we use the car

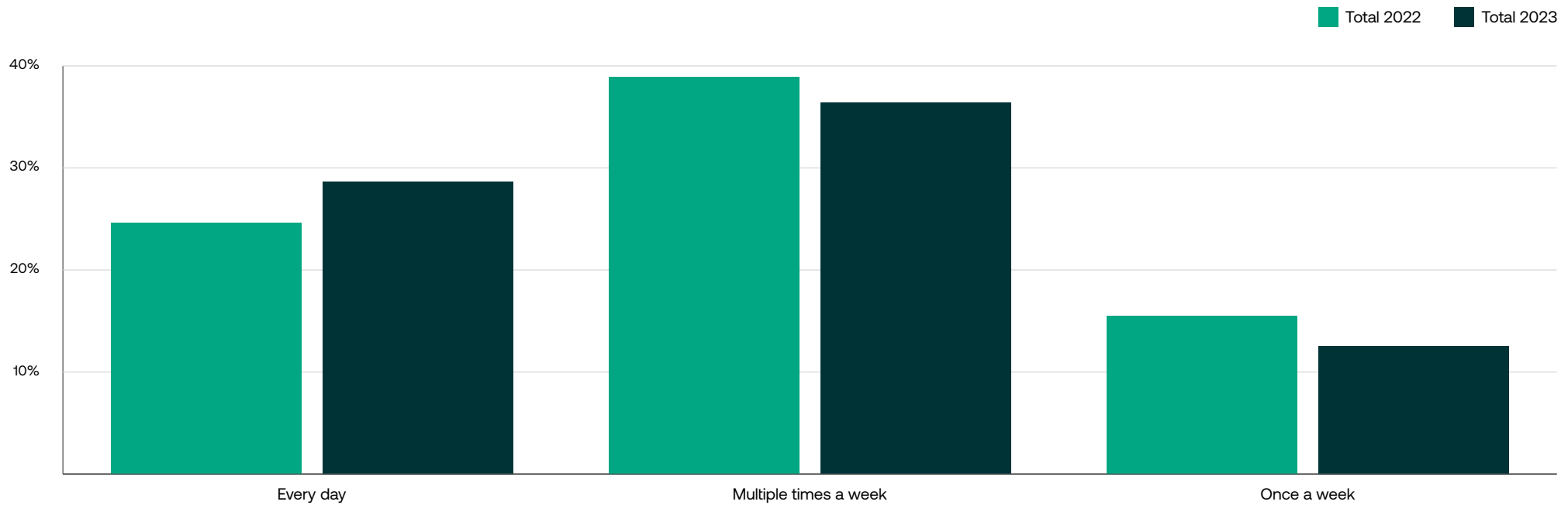
An interesting trend is that car usage is increasing on a daily basis but declining on a weekly basis. This is a change compared to previous year. Why?

There are contradictory trends that both promote and impede car usage. People returning to their offices after the pandemic has made car travel on a daily basis more common. But the increase in prices in general and fuel prices specifically makes it much more expensive to drive. This creates incentives for people to use the car more often for their daily commute but less often in general because it's more of a cost.

We drive more on a daily basis

Question

Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation? [Car]

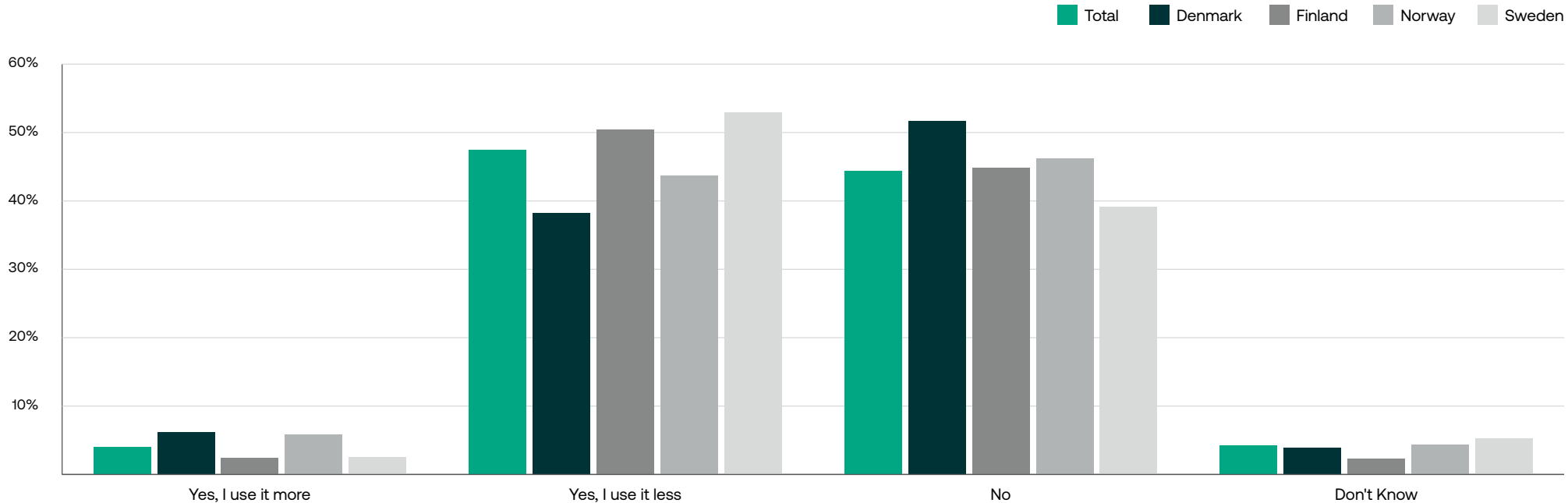


What is clear though is that the increase in fuel and electricity prices are making people use their car less on an average level. They might be using it as frequently on a weekly basis, but when they are using it, 47 percent of car owners say that they use it less.

Almost half of car owners are using their car less because of increase in fuel/electricity prices

Question

Have the recent increases in fuel and electricity prices impacted how much you use your car?

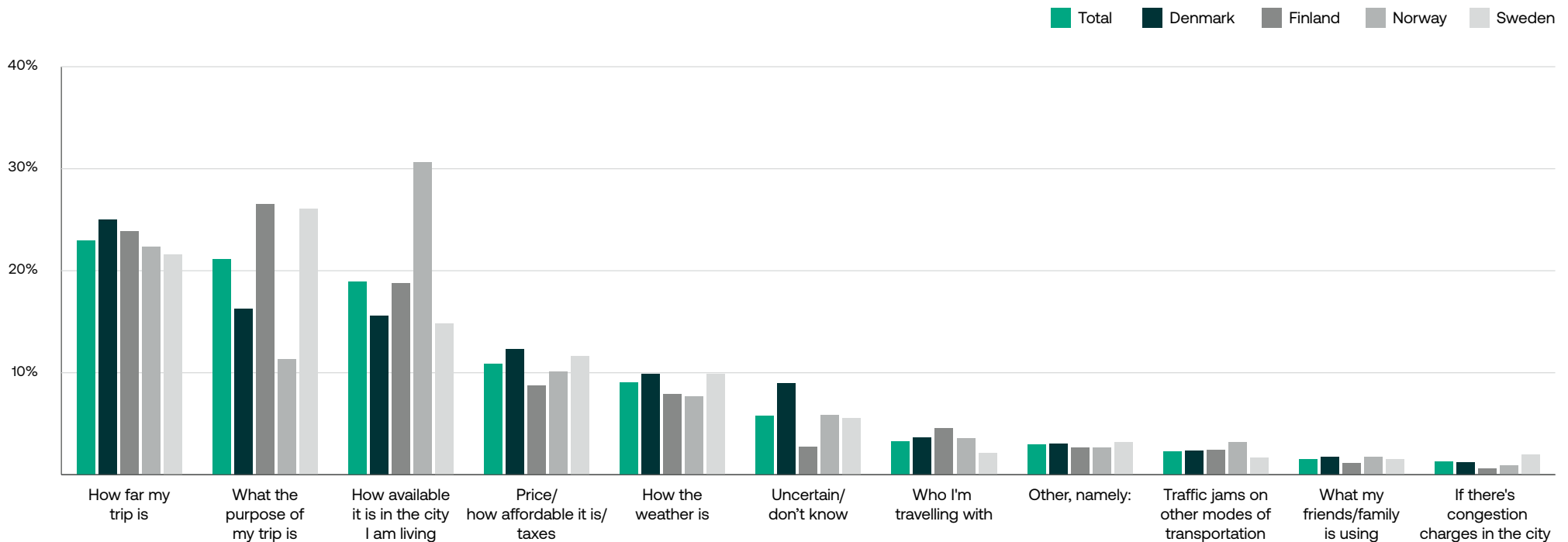


And asking the people who admit to using their car less, 1 out of 3 respondents say that they are letting their car sit by a minimum of 30 minutes on a daily basis. Maybe you still go to work with your car on a weekly basis, but you choose to walk to the store at night if you need something.

1 in 3 respondents use their car less by up to and over 30 minutes

Question

What, besides qualities intrinsic to the mean of transportation itself, impacts your choice of transportation the most?



Reasons for not choosing the car

Although the car is clearly the most popular mean of transportation, it's not for everyone. But why?

The people that said that they rarely or never used a car as a mean of transportation also got a follow up question. The sole biggest reason is because the lack of access to a car, with 52 percent choosing that alternative. For many people, and especially young people, not having a driver's license is also a factor which speaks against choosing the car. In general, we see that 43 percent reject the car because of this, but that this number increases to 56 percent if we look specifically at people between 18-34.

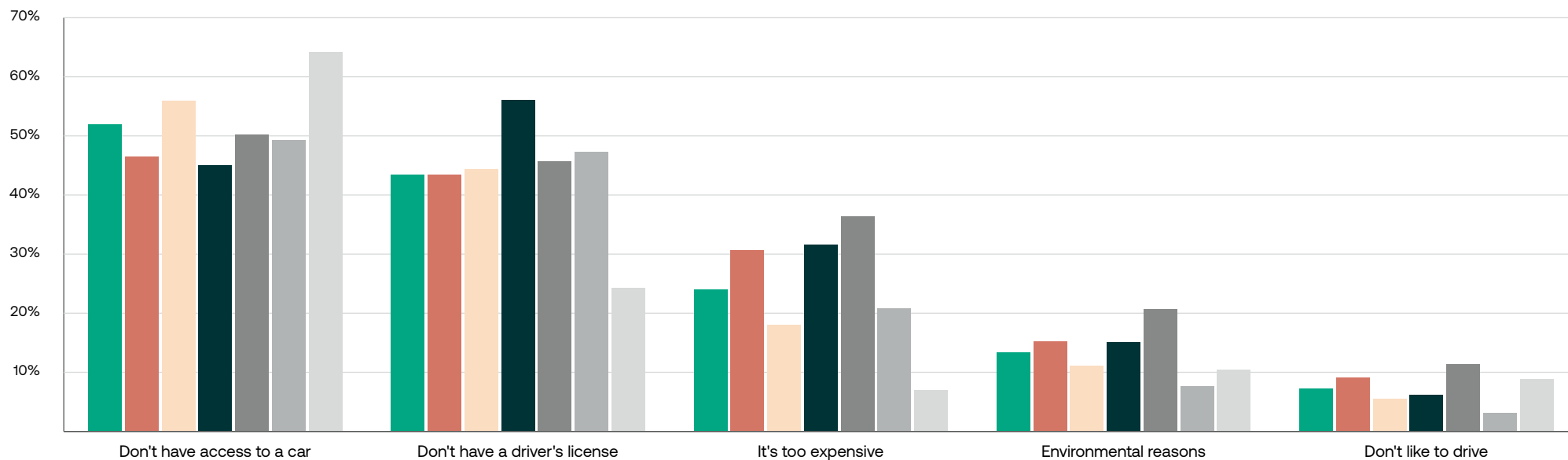


Lack of access to a car is the biggest reason for not using one

Question

Why do you rarely or never use a car as a mean of transportation?

Total Male Female 18-34 35-49 50-64 65+





3.2 Biking – a healthy but less convenient option

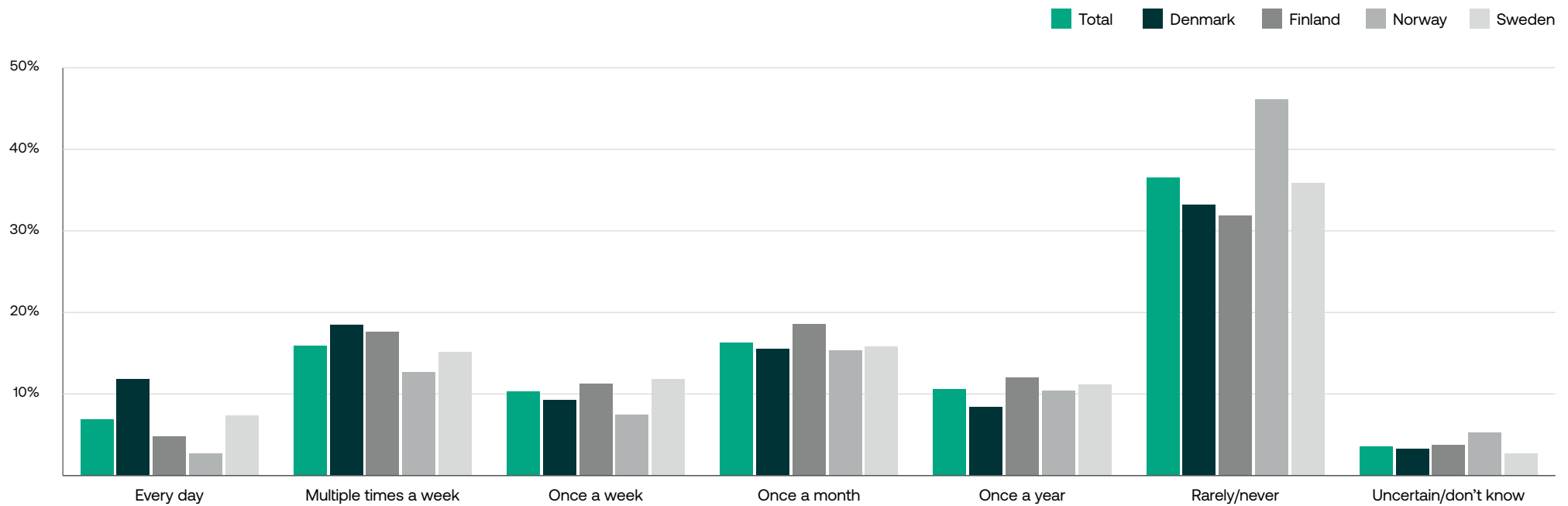
There are some interesting differences between the Nordic countries if we look at the other means of transportation. Even though we share a lot of history and culture, our cities and countries differ quite a lot when it comes to population density and infrastructure. This might be the most salient if we look at bike usage.

It's clear that the Danes love the bike more than their Nordic counterparts. 30 percent of them use as a bike multiple times a week which is clearly the most. On the bottom we instead find the Norwegians, where 46 percent of them says that they rarely or never use a bike, compare to 33 percent in Denmark, 32 percent in Finland and 36 percent in Sweden.

The Danes really do love their bikes

Question

Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation? [Bike]

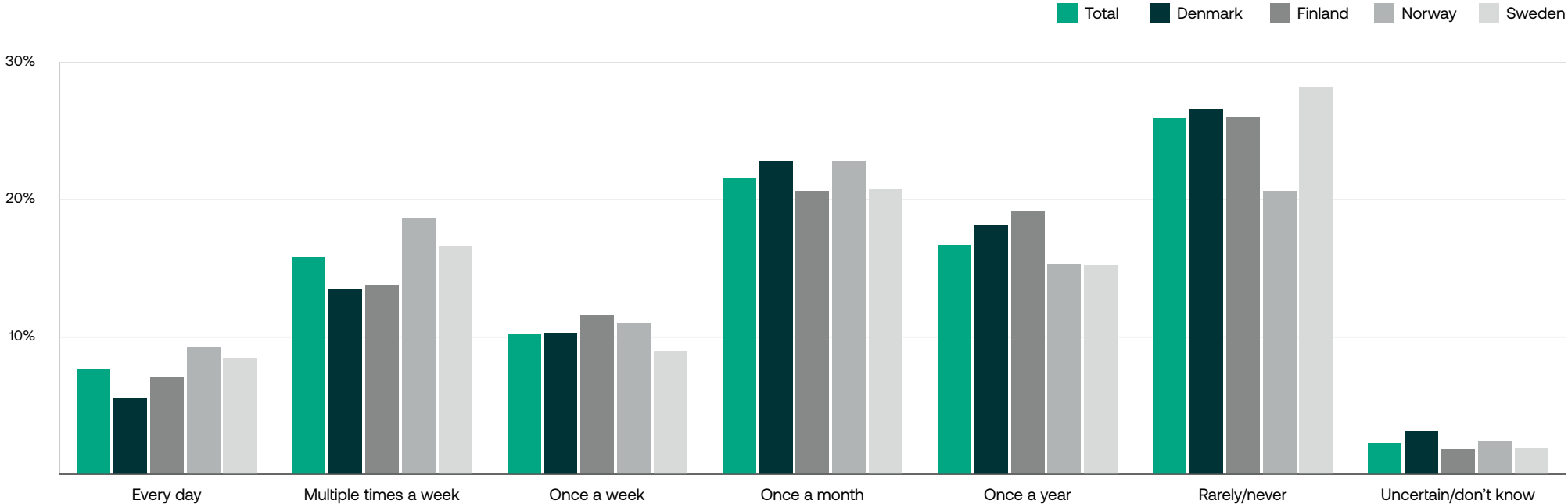


3.3 Public transit – not for everyone

1 out of 3 use public transit on a weekly basis

Question

Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation? [Public transit (tram, subway, bus, train, boat)]



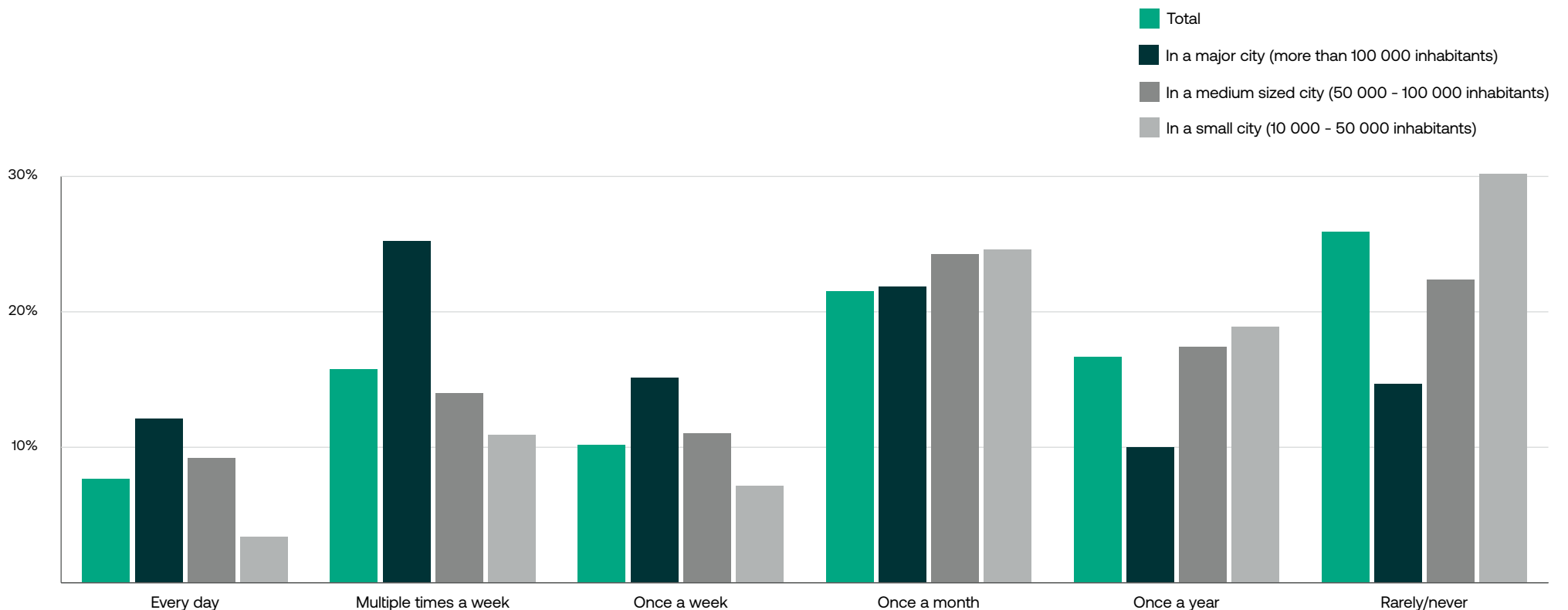
Comparing to the rest of the world, public transit is more developed in the Nordic countries and there's no huge differences between the countries. On average, around 1 out of 3 people in the Nordics use public transit on a weekly basis.

Public transit is not only a mean of transportation, but also a major component of living in bigger cities. It's mainly used by people in urban areas, as the differences between them and the people living in rural areas are quite large. 55 percent of people in major cities use public transit on a weekly basis, compared with 21 percent of people living in rural areas.

Public transit is used much more in bigger cities

Question

Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation? [Public transit (tram, subway, bus, train, boat)]



4. The Mobility Indicator – comparing how we act with what we want

To live is to wish. But we do not always act as we wish.

The Mobility Indicator compares our wishes with how we act when it comes to using means of transportation.

The Mobility Indicator is based on two separate questions, with the same alternatives. The first question is “Consider transporting yourself from place A to B. On average, how often would you wish to use the following means of transportation?” and the second one is “Consider transporting yourself from place A to B. On average, how often do you use the following means of transportation?”. By taking the results from the first question minus the second, we can see the differences between what the respondents on average want, minus what they do, we find the gap between their dream scenario and their reality.



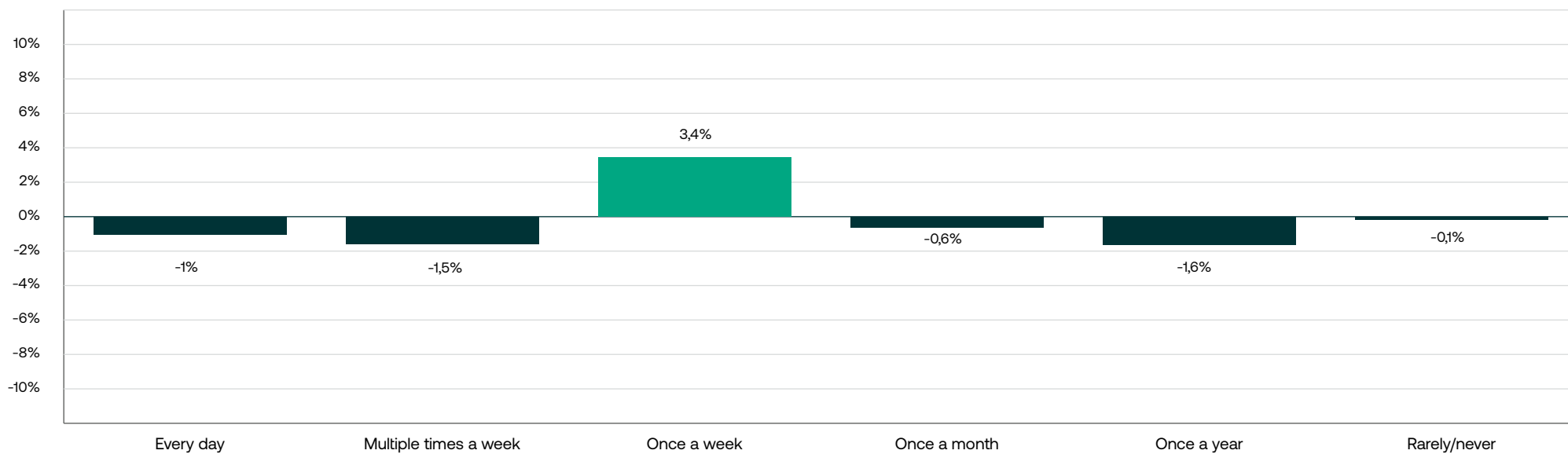
4.1 The car – nearing a perfect match

For every timeframe (timeframe meaning “every day”, “multiple times a week” etc.) we see a corresponding bar. If it’s light green – which means positive – it means more people on average want to use it in that time category compared to how many people actually use it. If it’s dark green – indicating a negative number – it’s instead more used than what people actually want to.

Looking at the results for car as a mean of transportation, people’s wants and dos line up in average. On average, people tend to want to use their car slightly more during the weekend, as 3,4 percentage

points more people say they want to use it on the weekend than actually does use it on the weekend. For a daily basis, the differences (-1 and -1,6 percentage points) are so low it’s hard to draw any conclusions. Glancing at last year’s figure we saw that the combined differences added up to 13 percentage points, but this year it’s 10,1. Maybe this is a move towards a perfect alignment coming up between the wants and needs in using the car. But why? Before we answer that question, in chapter 2, let’s look at who wants to use the car the most.

The Mobility Indicator – Spotlight on the car



Facts on the real car-lovers

People in cities would prefer to use the car a little bit more on a weekly basis than what they are currently doing, with 4 percentage points more indicate that they want to use it during that time frame than the amount of people actually doing it. This is in clear contrast with the people who live in rural areas. They prefer to use the car less on daily basis and instead use it more frequently on a once-a-week basis.

As noted earlier, the biggest reason for people rarely or never using the car is because of a lack of access to one. Not surprisingly, the group

that wants to use the car much more than how much they use it nowadays is people without a car in their household. All in all, the Mobility Indicator shows that 1 out of 4 of these people want to use the car at least once a week more compared with how much they use it nowadays.

This illustrates one of the main points in the Mobility Barometer. The biggest barrier to car use isn't something inherent with the car itself, it's because people don't have access to or can't afford one.



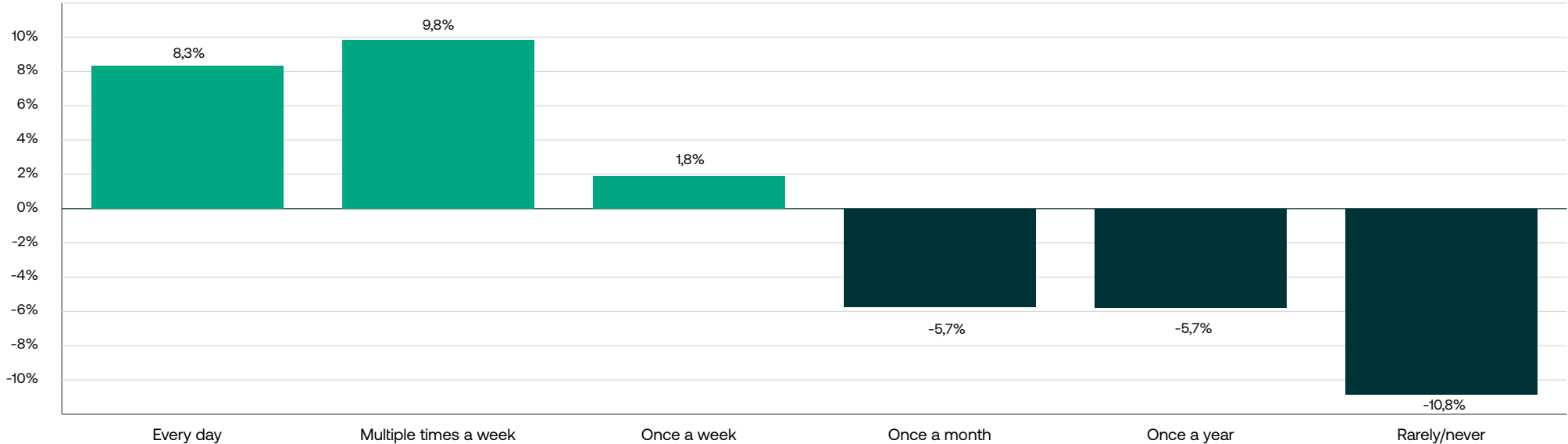


4.2 The bike – what explains the disconnect between wants and needs

It's a fact that people want to use the bike more than what they already do. 20 percentage points more wants to use it on a weekly basis than how much it is used on average. What does that mean?

Clearly the bike fulfills certain criteria that people value in their mean of transportation. But overall, the bike just doesn't do it, and even though people wish it could fill a bigger part in their lives, as we stand today it doesn't.

The Mobility Indicator: Spotlight on the bike

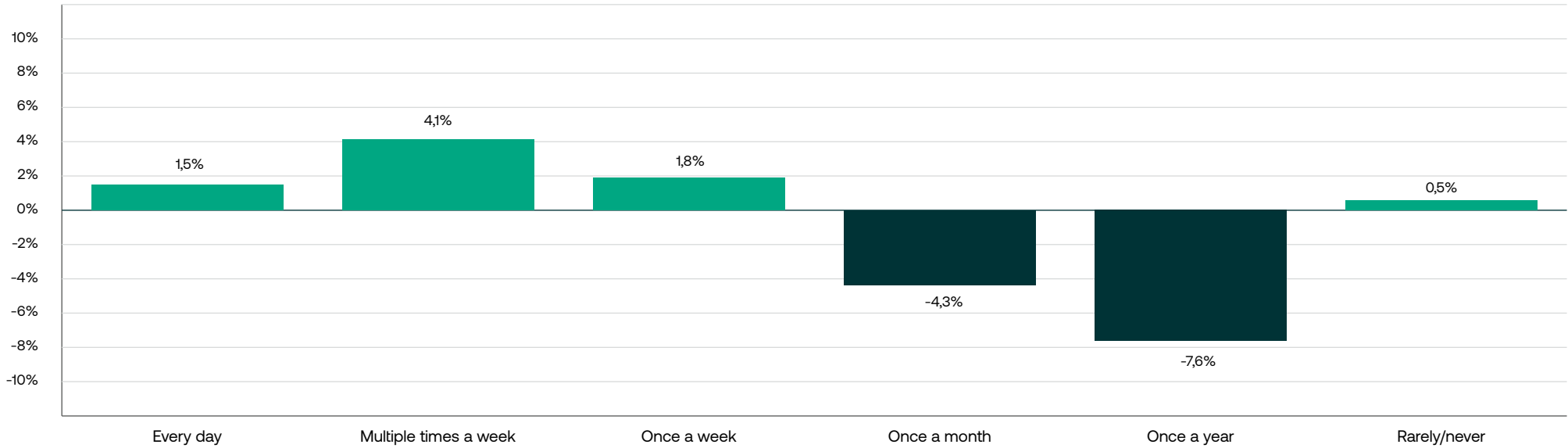


4.3 Public transit – almost what we want but not quite there yet

Public transit falls somewhere in between the car and the bike when it comes to how well it delivers on what people want from it and how they use it. However, it's a fact that people wish they could use it a bit more on a weekly basis, but not as much as the bike. It also differs in that the gap we see is not primarily on a daily basis, it's more about that more people want to use it a couple of times a week compared to what they do now. Or not at all, for when it comes to public transit it's worth noting that 3,9 percent wouldn't use it if they didn't have to.



The Mobility Indicator: Spotlight on public transit



SECTION



The truth about our choices

Why the car is so popular

Let's look at what goes into the decision to use one type of transportation over another. It's clear that some factors are more important than others, and for the northerners availability (48 percent), comfort (40 percent) and price (37 percent) are more the most important. But there are also some striking differences between the countries.

Availability is especially important for the Norwegians, with 57 percent of them deciding that's the most important factor when choosing a mean

of transportation. That's also an important factor for the Swedes. But Swedes also value comfort, which 50% picks as the deciding factor. Price however is equally valued by all.

What is not equally valued is speed, and the Finns love living in the fast lane the most. Compared to the Nordic average of 27 percent, 49 percent of Finns pick it as one of the most important factors for choosing a mean of transportation.

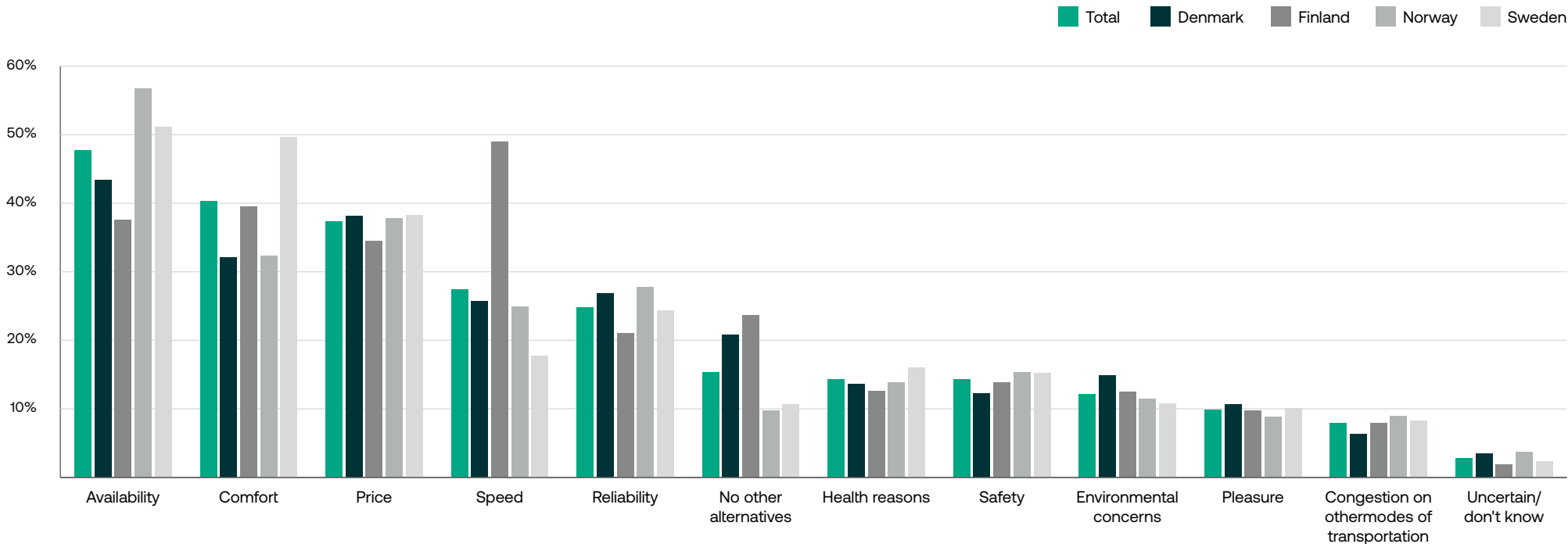
How our preferences match the different means of transportation

To decide what matters when choosing a mean of transportation, the persons in this survey can pick three options out of ten. This is valuable when comparing this with what they then associate with the most used means of transportation.

What we are looking for when we choose a means of transport

Question

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

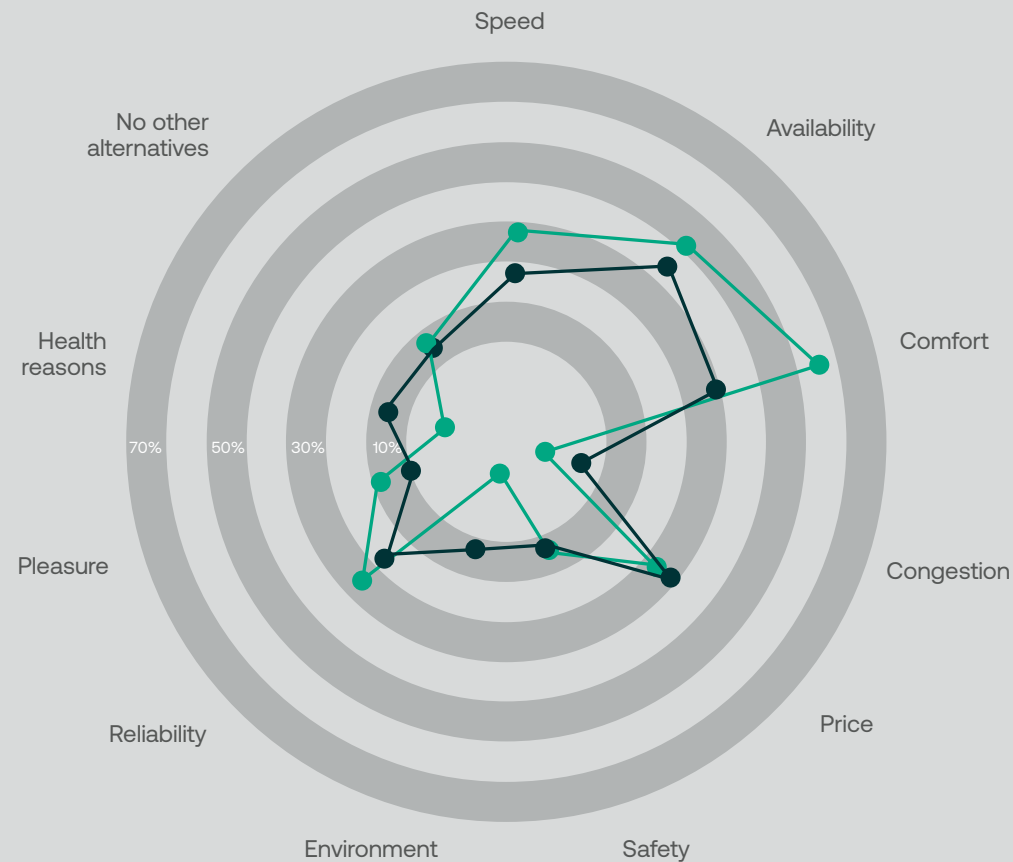


1. Spotlight car

The car matches our expectations of what we want from a mean of transportation very well. This is a big part of the explanation to why using a car is the most attractive way to transport oneself. It delivers where it needs to. And if one wants a bit more comfort or speed for example, that can be accounted for by simply choosing a car that are more in line with that.

Almost perfect match for the car

- Preference
- Car

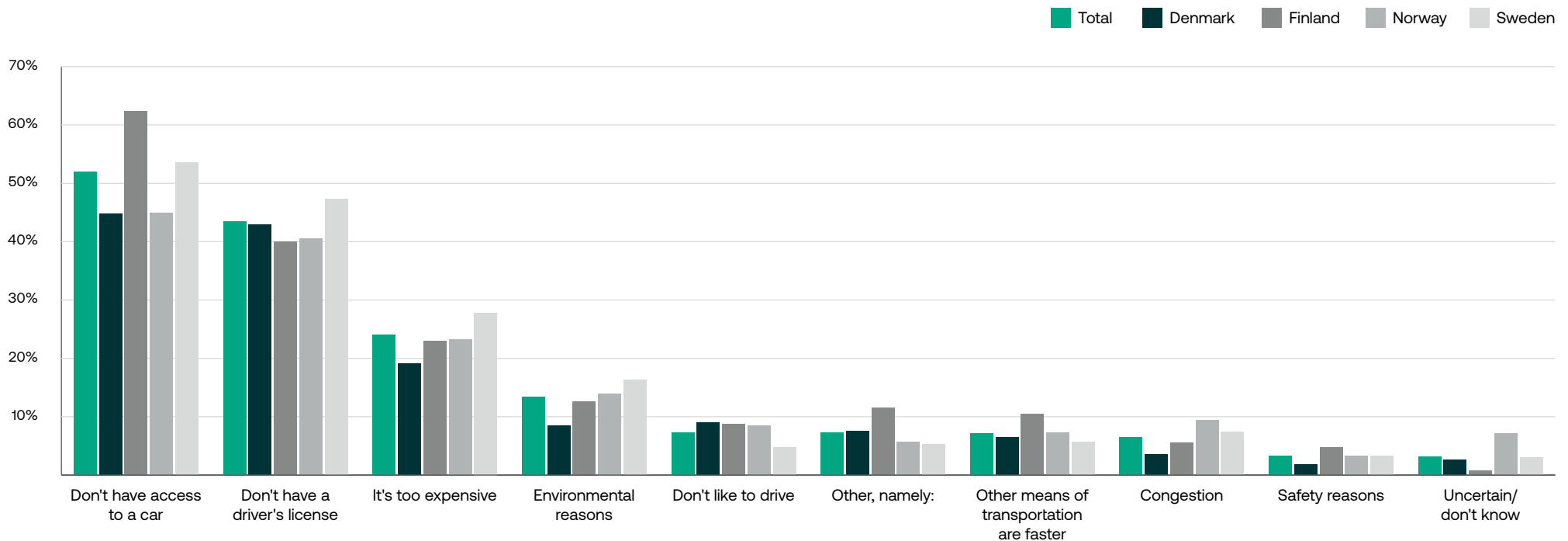


The associations with the car differ depending on country. For example, Finns associate it with speed to a much higher degree than others. Swedes view it more as comfortable compared to their neighbors, with 73 percent of them associating the car with comfort.

Associations to the car differ a bit between the Nordic countries

Question

Why do you rarely or never use a car as a mean of transportation?



2. Spotlight bike

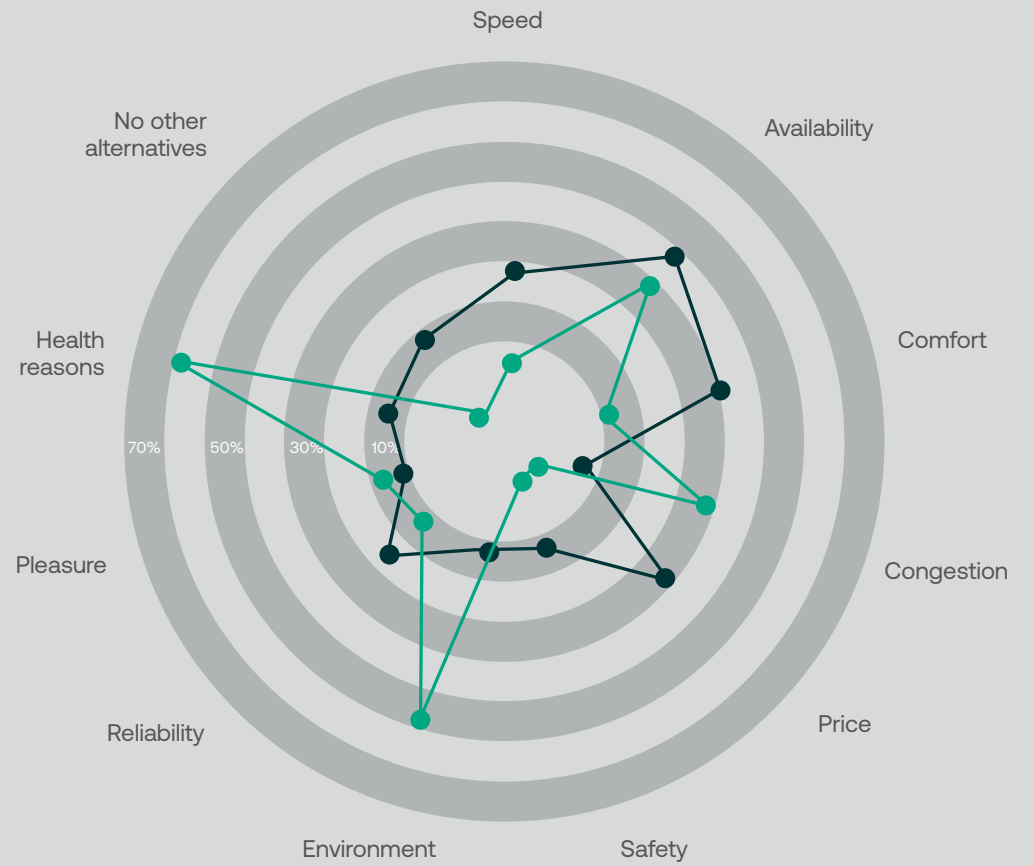
A woman with long brown hair, wearing a camouflage-patterned hoodie and dark pants, is sitting on a black bicycle. She is smiling and looking towards the camera. The background consists of a dense, dark green hedge. The bicycle has a black frame, handlebars, and a front fender. A leopard-print bag is visible in the foreground, partially obscuring the bottom of the bicycle.

The bike is widely considered to be the top choice for the healthy and environmentally aware northerner. However, looking at the diagram on the next page, the bike seems like a good option to have, but maybe not the first option you want to use.

The bike is a good option depending on where you live and how far you travel. The bike might be a better option when other means of transportation is prone on congestion. However, when the traffic is regularly flowing the lack of speed and comfort of a bike makes it lag behind the other options.

The bike is not matching our preferences very well

- Preference
- Bike



Why Danes are the kings of cycling

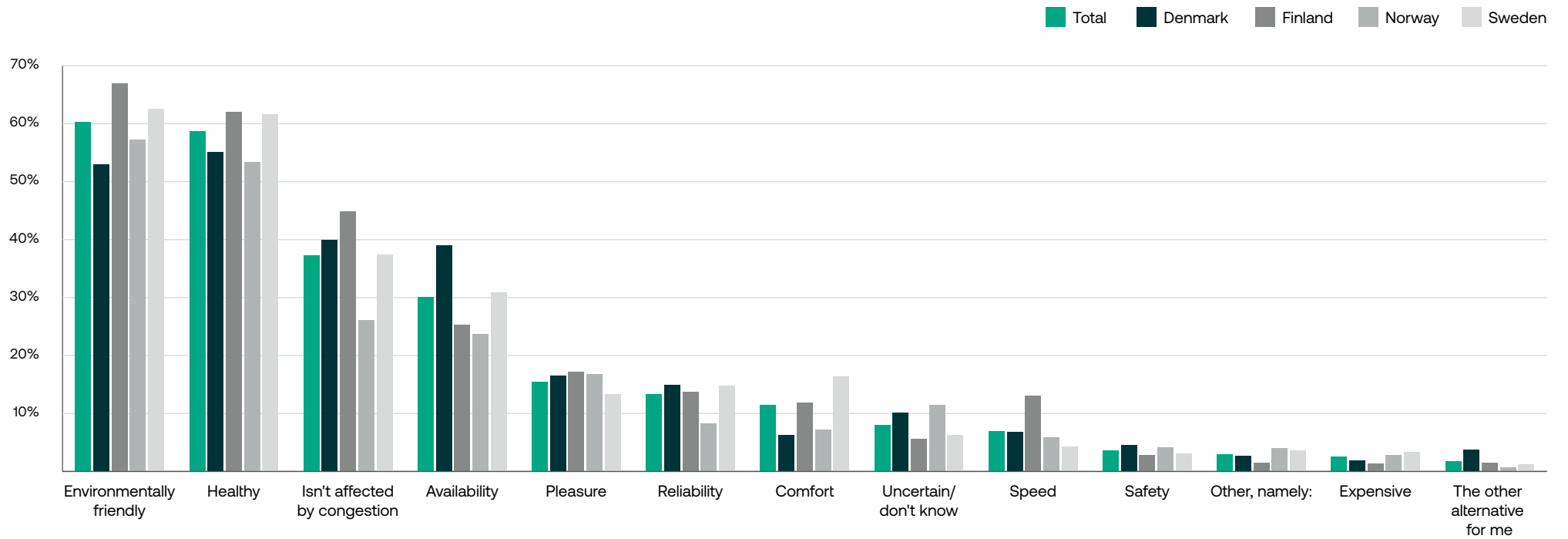
Looking closer at the differences between countries, there is a possible explanation for why the Danes use the bike so much. Availability is highly sought after from a means of transportation, with 48 percent of the respondents answering that it determines what they use as a means of transportation. But for the Finns, 25 percent associate bike with availability and for Norwegians the number is 24 percent. However, asking the Danes we find that 39 percent associate bikes with availability, indicating that for them it fits their needs quite well. It's quite remarkably close, as 43 percent of Danes says that it this specific factor determines what they transport themselves with.



The Danes find the bike more available

Question

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



3. Spotlight public transit

Here, public transit is stuck right between the bike and the car. The car is a better option in terms of availability and comfort, whereas the bike is seen as superior when it comes to being the healthy and environmentally friendly option. So where does that leave public transit?

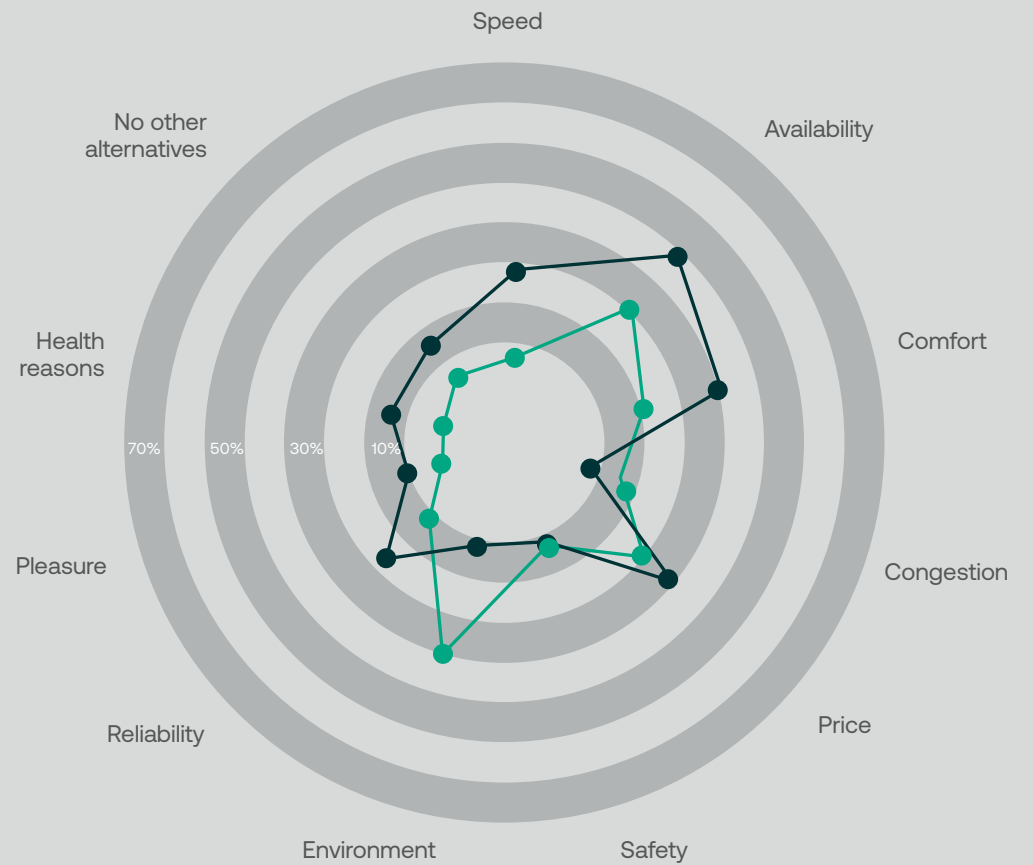
Finding a new role in the green mobility revolution will be key for public transit to be a continuous part of our daily lives. As the car gets greener

and the idea of the “15-minute city”^{*} takes hold in the world and in the Nordics, the idea of being the environmentally friendly option for cars in cities, or the quicker option for walking won’t hold. And for people living in rural areas, the car will continue to be the most attractive solution – if not the only solution – to getting around. Looking forward, public transit will need to bridge the gap between what we associate it with and what look for in a mean of transportation to stay relevant.

*The 15-minute city (FMC)[1] is an urban planning concept in which most daily necessities and services, such as work, shopping, education, healthcare, and leisure can be easily reached by a 15-minute walk or bike ride from any point in the city.

Public transit fit some of our preferences, but not all

- Preference
- Public transit





Public transit – different costs across the Nordics

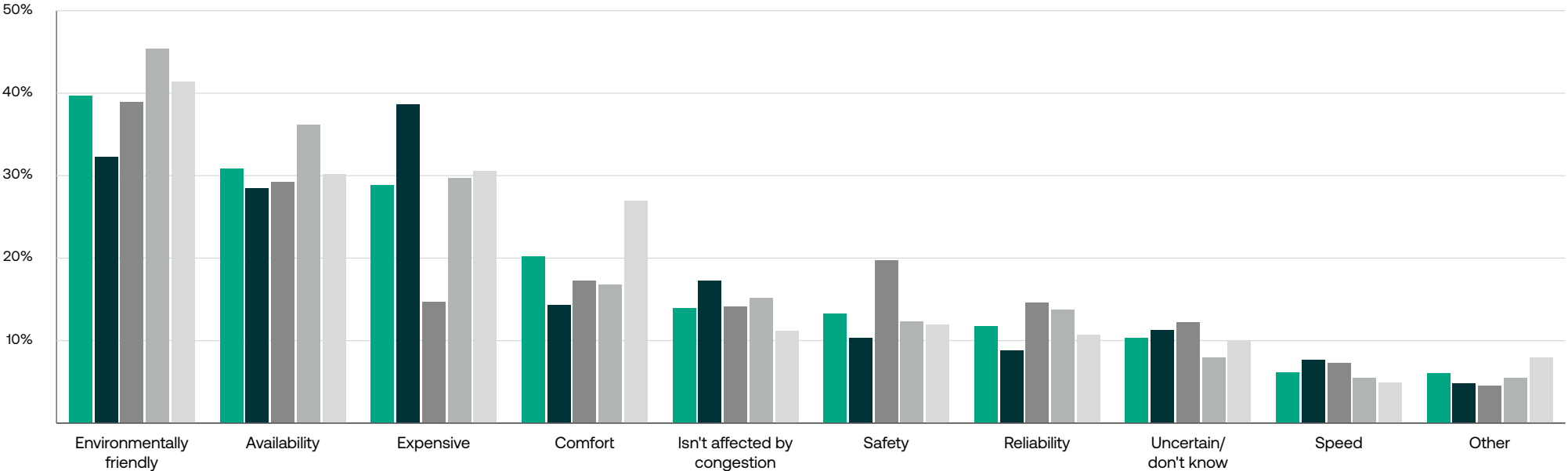
Lastly, it's worth noting that 29 percent associate public transit with being expensive. This is almost the same as for the car, with 32 percent associating it with the same thing. There's also a big variance between countries, where 15 percent of Finns and 39 percent of Danes associate public transit with being expensive.

The Danes find public transit more expensive

Question

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

■ Total ■ Denmark ■ Finland ■ Norway ■ Sweden



3 SECTION

Car ownership of the future and the green mobility revolution

In this chapter, we turn completely towards the car and all aspects surrounding it. What type of car does the Nordic people want and how do they want it to develop going forward? Big questions, but luckily, we have the answers.

1. The road towards a sustainable mobility

The electric vehicle continues to be the way towards the future. But perhaps there are the first signs of a slowdown in their popularity. A drastic increase in electricity prices and the removal of beneficial policies are reducing the demand for electric cars. As confirmed in this study,

these are major impediments towards the drive towards an all-electric future. Even if electric cars are more popular than ever, they are still not as popular as cars with traditional sources of fuel.

2. Electric cars: Where we stand today

Electric vehicles are not a new phenomenon, but the green mobility revolution is. From being a niche technology with few mainstream applications, electric cars are now a common and welcomed sight on our streets. And their market share has been steadily increasing over the last few years.

Looking back at the previous year, Norway leads the way in the electric revolution with almost 4 out of 5 cars sold being fully electric. Meanwhile, out of all the cars that were sold in 2022, 1 in 5 cars in Denmark and slightly less than that in Finland were fully electric, whereas in Sweden the number is 1 out of 3. Clearly, Norway is miles ahead of their Nordic brothers.

Electric cars – a rational choice

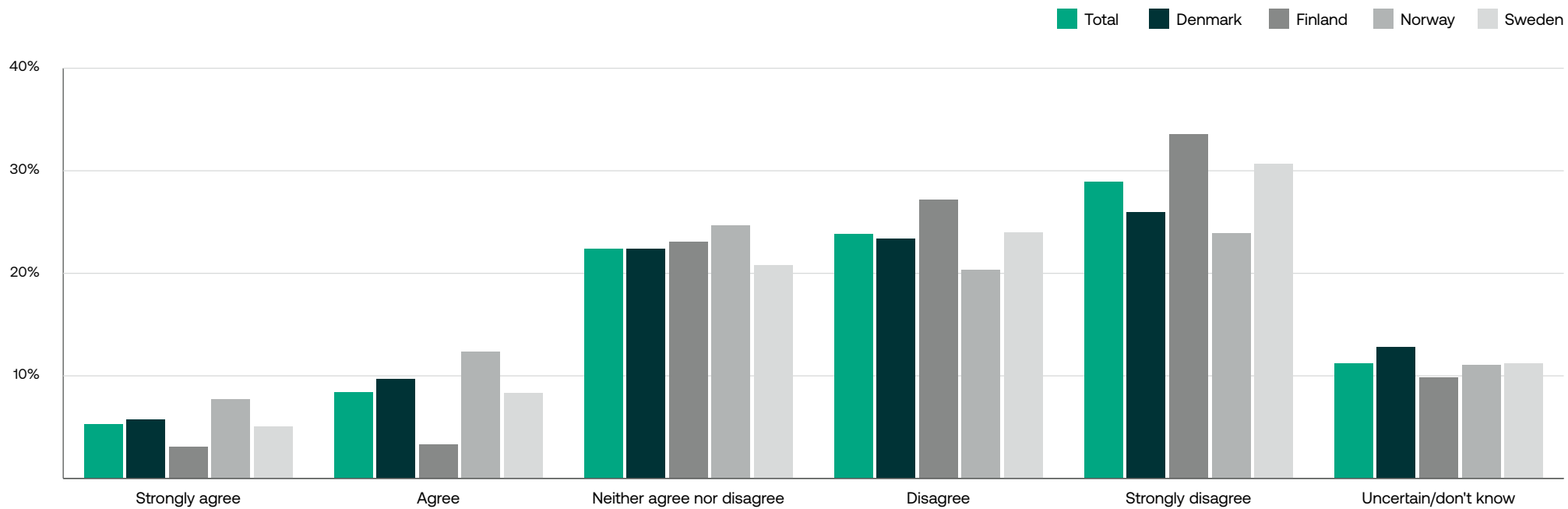
The drive towards an electric future doesn't seem to be based on ideology or force. It just seems like an electric car might be the best option for some people. Only 13 percent of the people in the Nordics would never buy a car that wasn't electric.



People don't have to buy an electric car, they want to

Statement

I would never buy a car that wasn't electric



The truth about the popularity of electric cars

The market shares of the electric car differ a lot depending on the country. But there are more similarities regarding attitudes.

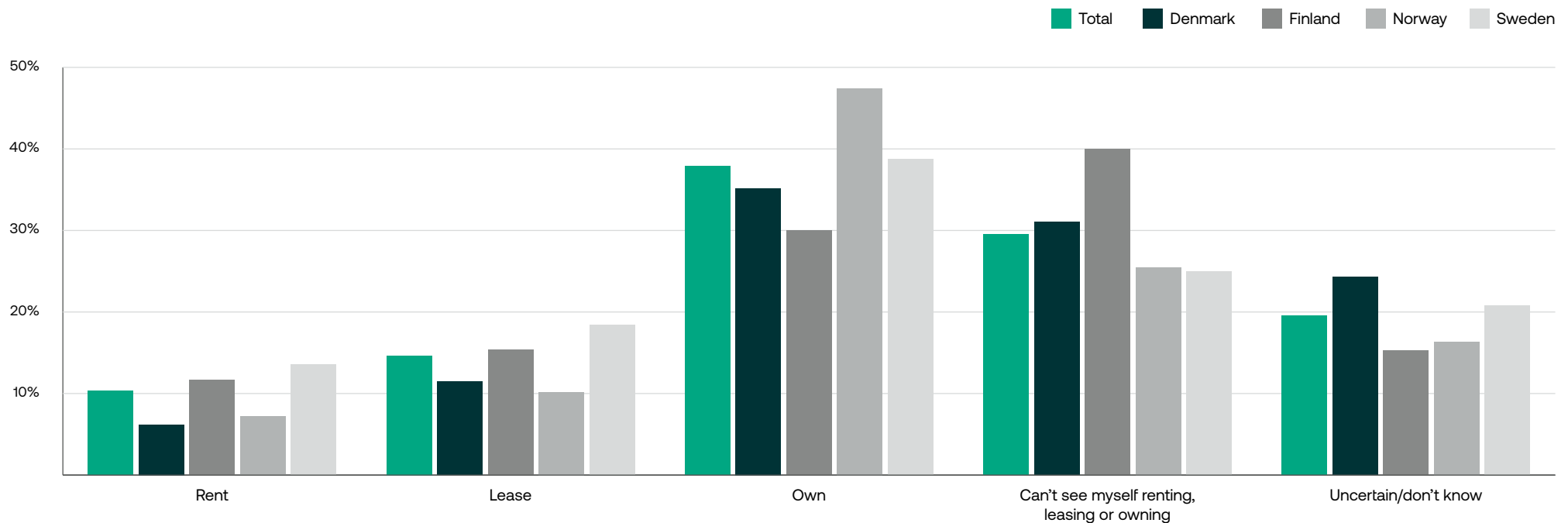
Only 3 out of 10 people in the Nordics can't see themselves renting, leasing or owning an electric car. Norwegians are the most positive towards electric cars when it comes to ownership. Finnish people on the other hand are the most negative, with 4 out of 10 people saying that they can't see themselves renting, leasing or owning an electric car. This makes them the only country in the Nordics where more people are against renting, leasing or owning an electric car compared to how many can see themselves owning one.



Electric cars are here to stay

Question

What type of car can you consider renting, leasing or owning? [Electric]



Comment: Respondents can pick multiple options and therefore the numbers per country can exceed 100%



Why it isn't more popular

How popular should electric cars be? The question is largely rhetorical, as it's impossible to answer it. Instead it's possible to look closer at why it's not an option for some people, and see what's impeding it's popularity.

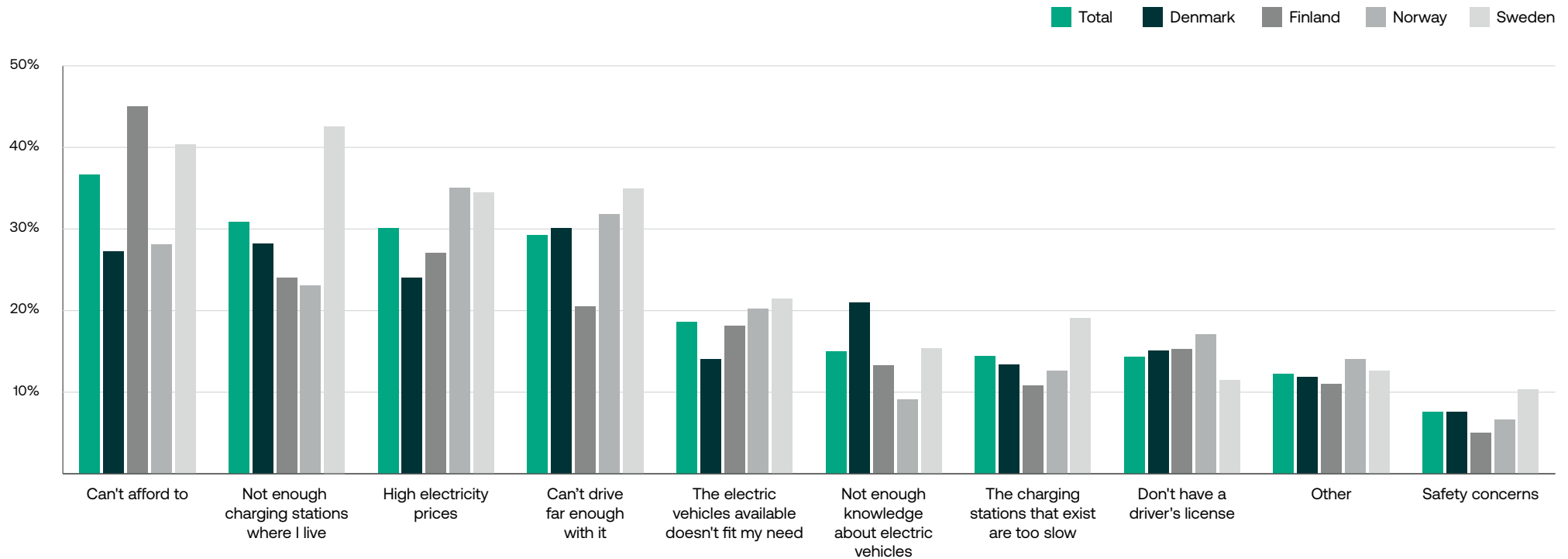
The people who said they can't see themselves renting, leasing or owning an electric car were asked why.

Price, lack of charging stations and battery limitations are the most common reasons for people turning down an electric car. In Finland the price of the car is a bigger issue than in the other countries, with 45 percent of them saying that they can't afford to rent, lease or buy one. Sweden stands out with 43 percent saying that it's because there's not enough charging stations where they live.

If electric cars were cheaper and went further, more would buy them

Question

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





Higher electricity prices has an impact

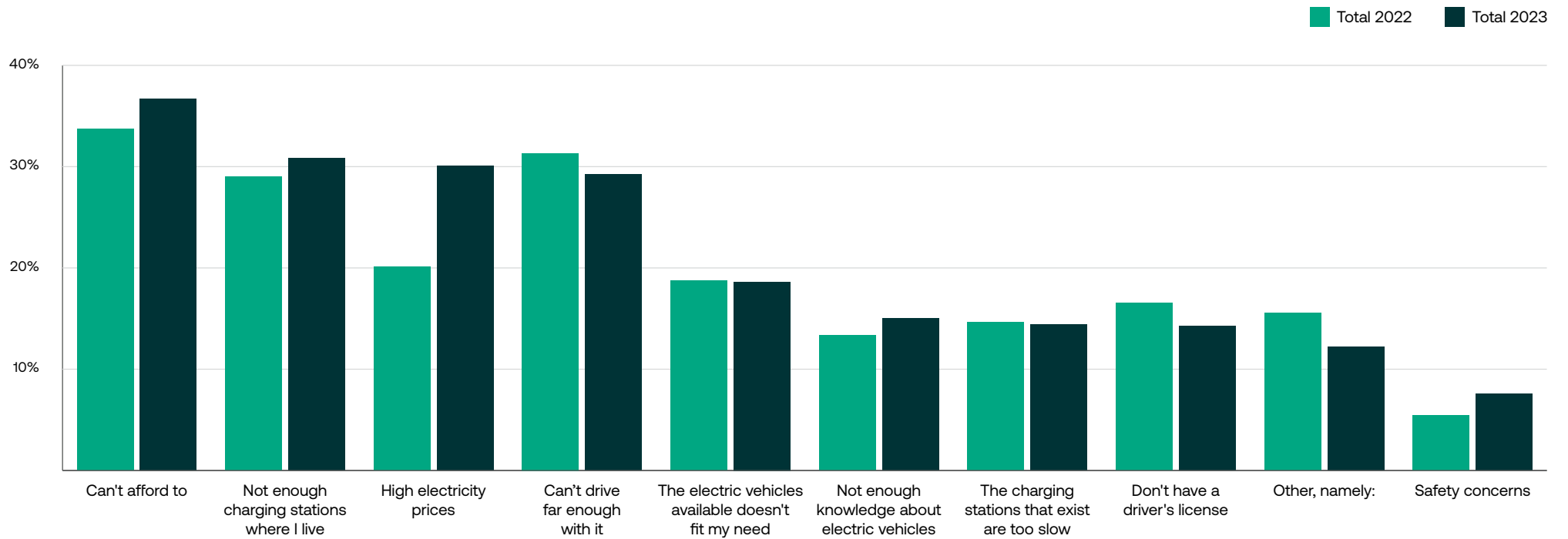
The share of new cars that are electric has increased and there are not any signs that the electric revolution is about to stop. But it might be slowing down.

One significant finding in this year's study is that 50 percent more people said that they can't see themselves renting, leasing or owning an electric car due to high electricity prices, compared to in 2022. There is a clear increase in this option and in this option only. Considering the volatile prices of electricity in the last year, it's not surprising. If this trend continues, one of the major reasons for picking an electric car, i.e. that electricity is cheaper than traditional source of fuel, might not be as big of a lure.

50% increase in the option
“high electricity prices”

Question

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



What could make the electric car more popular

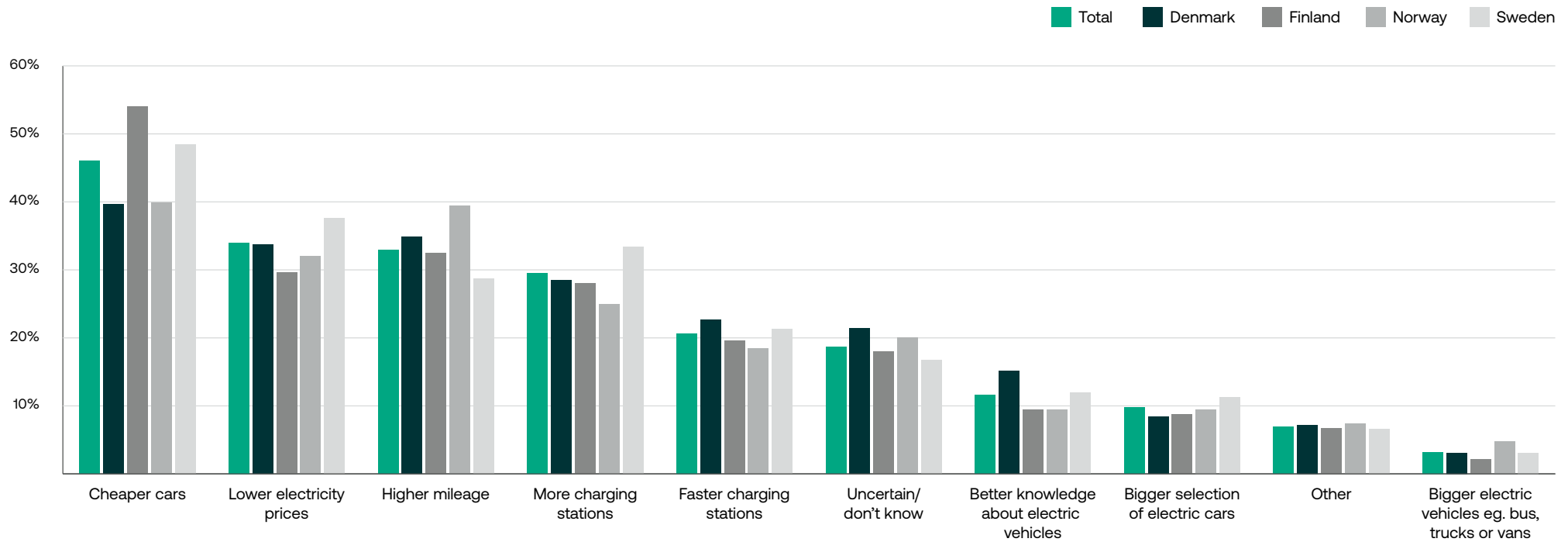
46 percent of the Nordic people say that cheaper cars would make it more likely for them to rent, lease or own an electric car. Other factors that would make them more popular are lower electricity prices (34 percent), higher mileage (33 percent) and more charging stations (30 percent).



What do we want? Cheaper electric cars!

Question

What would make you more likely to rent, lease or own an electric car?





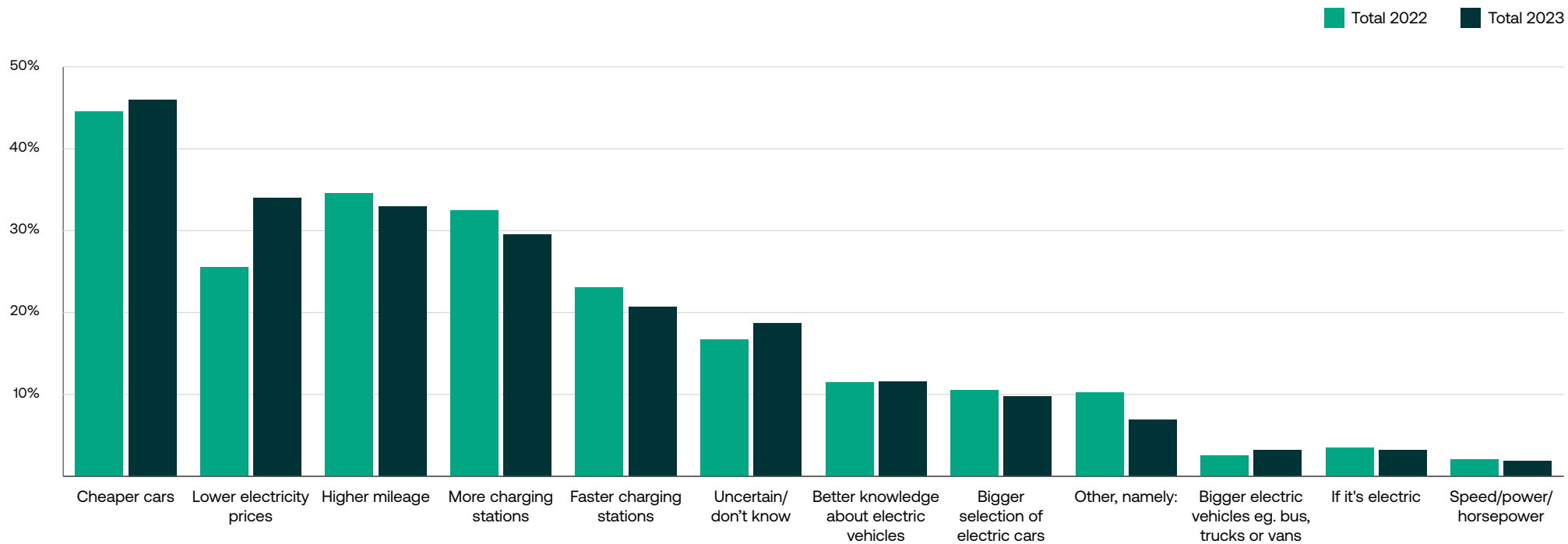
Clear sign that electricity prices are becoming more of a problem

Comparing with 2022, there is a big increase in the amount of people who says that lower electricity prices would make it more likely for them to rent, lease or own an electric car. With an increase from 25 percent to 34 percent, it becomes the second most popular measure to increase the likelihood of buying an electric car.

High electricity prices are turning more people against electric cars

Question

What would make you more likely to rent, lease or own an electric car?



Some final words on the future of electric vehicles in the Nordics

For a long time, specific policies with the intent to make it more attractive to buy and own an electric car have been a common norm in the Nordics.

However, it's not as clear cut that this will continue to be the case. As market shares improve, subsidies are being removed in favor of more technologically neutral incentives.

For example, in Sweden the government is removing the "climate bonus" which effectively made it cheaper to buy an electric vehicle. But at the same time, they are investing heavily in charging infrastructure, making it easier and more convenient to own an electric car. In Norway, the government are introducing VAT on electric cars over a specific amount

while also introducing that the weight fee for cars includes electric vehicles. Even though it's clear that electric cars are here to stay, it's unclear what effect these new policies will have on the continuous growth in markets share in the short run.

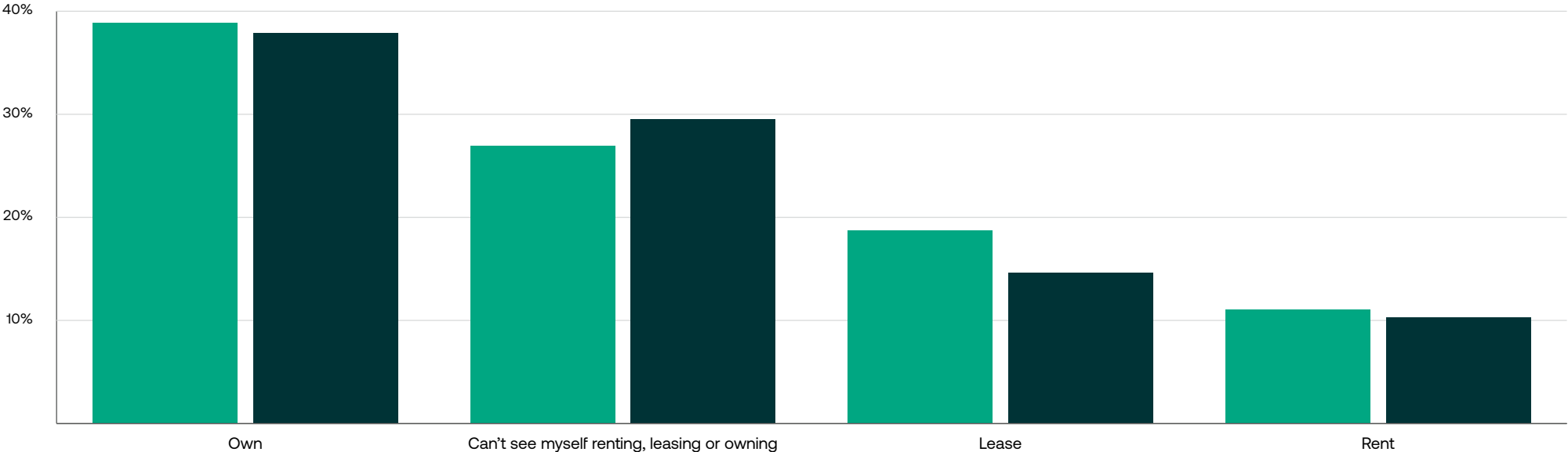
Comparing the results of this year's Mobility Barometer with last years, there are only small evidence for this to be the case. Three percentage points more can see themselves renting, leasing or owning an electric car, and four percentage points less say they consider leasing one. Although the shifts are small, it's clear that the attitudes towards electric cars haven't become more positive over the last year, and more likely more negative.

Small but negative shifts in the attitudes towards the electric car

Question

What type of car can you consider renting, leasing or owning? [Electric]

■ Total 2022 ■ Total 2023





3. The other types of cars

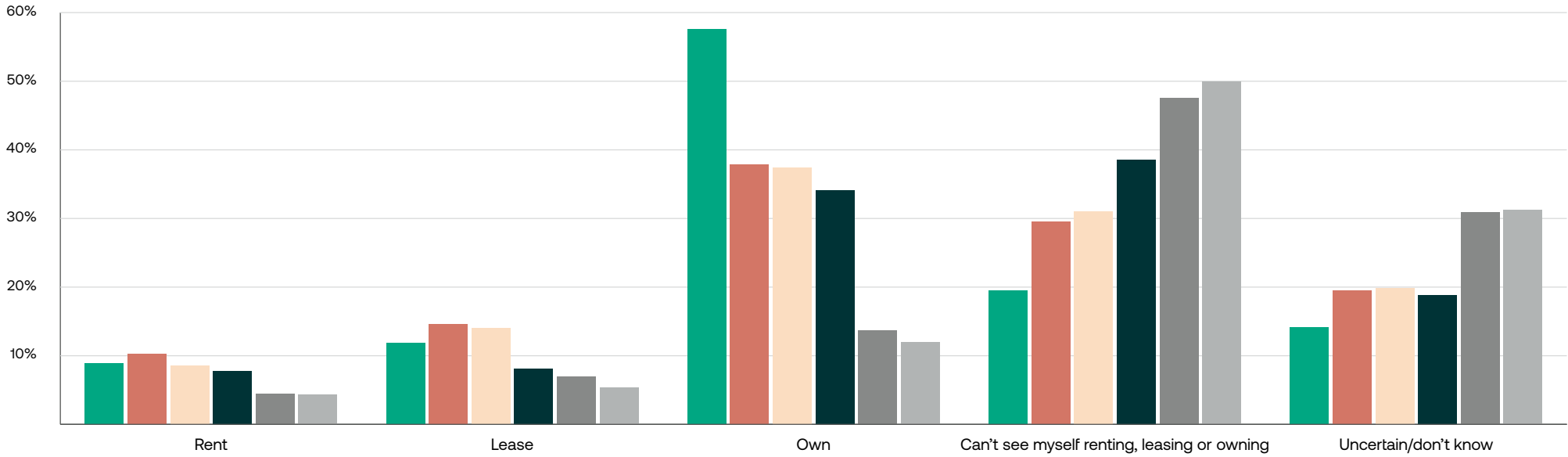
In this report the focus have been mainly on electric vehicles, however it's important to remember that the most popular type of vehicle is still the gasoline driven one. While 30 percent of the Nordic people can't see themselves renting, leasing, or owning an electric car, only 19 percent says the same thing about a gasoline car.

Gasoline cars are still very popular

Question

What type of car can you consider renting, leasing or owning?

Gasoline Electric Plug-in hybrid Diesel Hydrogen Ethanol



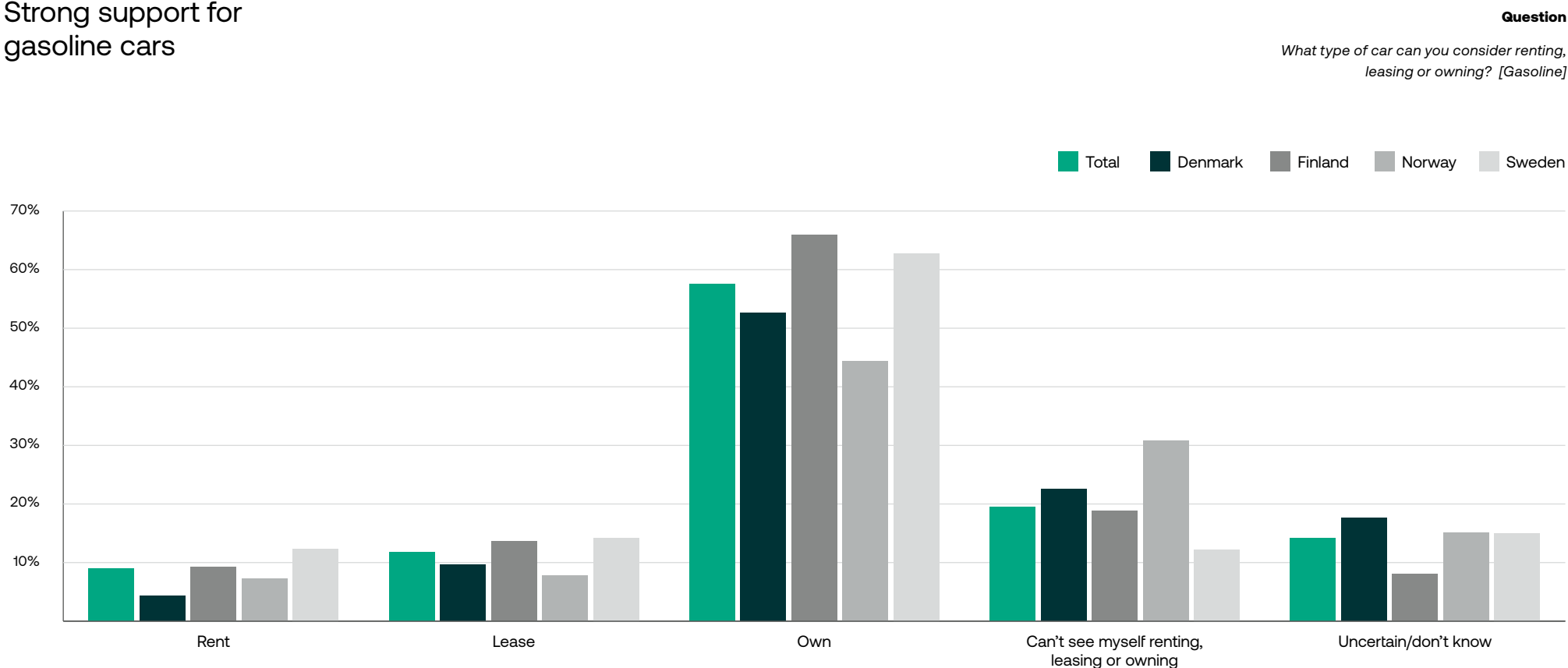


3.1 Gasoline cars

In all the Nordic countries, there's a positive attitude towards renting, leasing or owning an electric car. But Norway stands out, with 44 percent saying they can consider owning a gasoline car and 31 percent saying

they can't see themselves renting, leasing or owning a gasoline car. Norway is the only country in the Nordics where the population is more positive towards electric cars compared to gasoline cars.

Strong support for gasoline cars

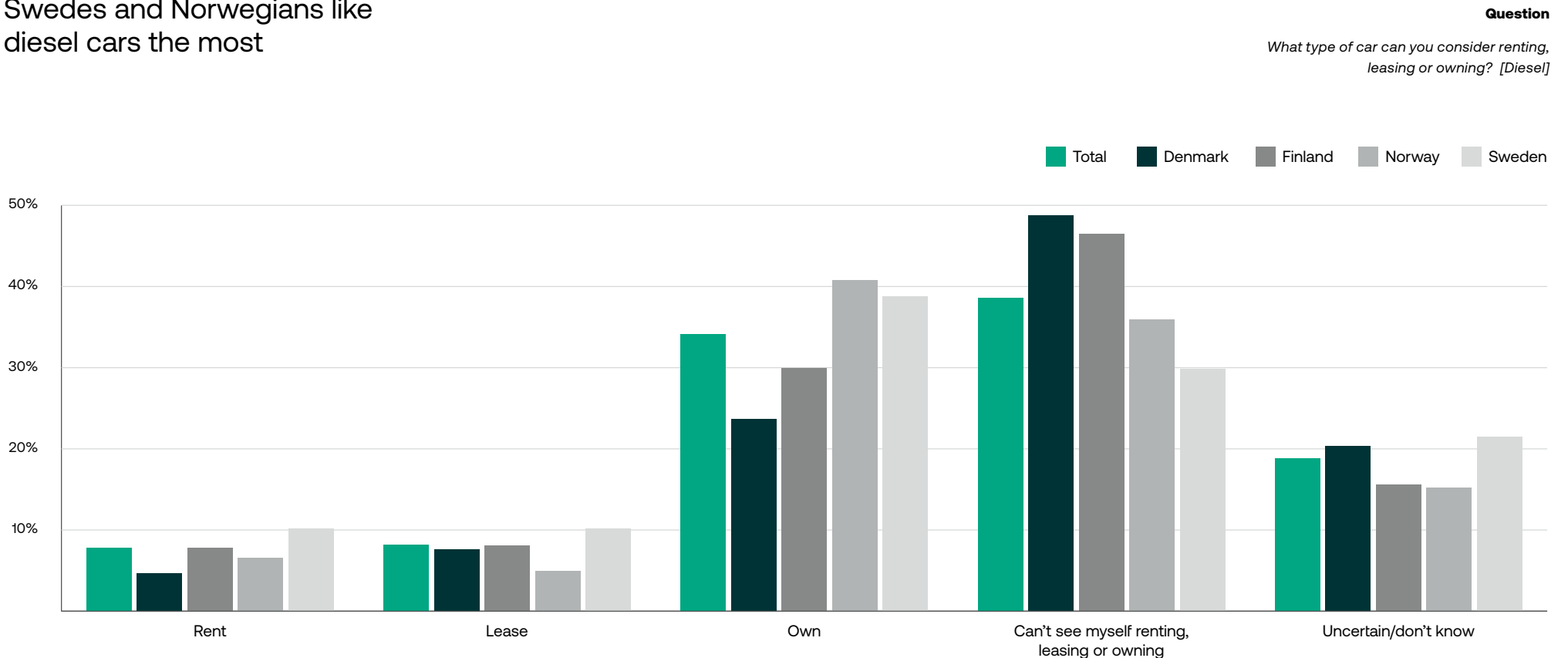


3.2 Diesel cars

Diesel cars are the fourth most popular car to rent, lease or own in the Nordics. The Danes are the most negative towards diesel cars, with 49 percent saying that they don't consider renting, leasing or owning a

diesel car. The Swedes on the other hand are the most positive, with only 30 percent saying the same thing.

Swedes and Norwegians like diesel cars the most



3.3 Plug-in hybrid cars

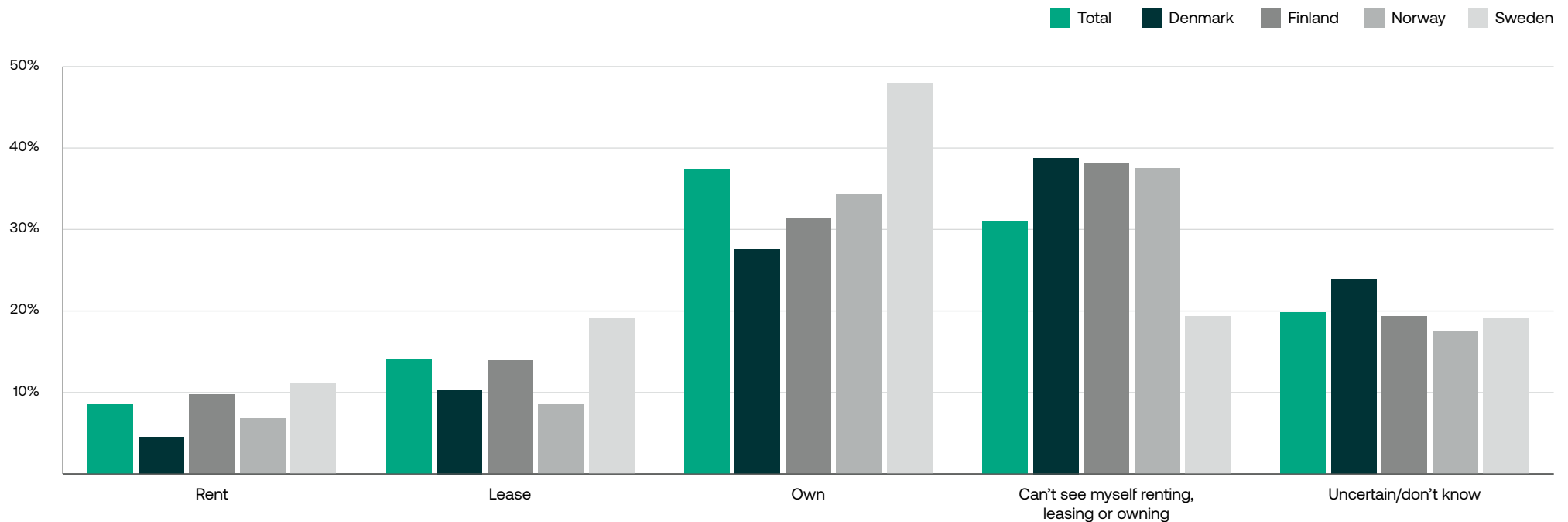
If one wants to get the best out of an electric as well as a traditionally fueled car, then the plug-in hybrid offers great value. They are as popular

as fully electric vehicles, with Swedes clearly liking them the most. Almost half of Swedes, 48 percent, can consider owning a plug-in hybrid.

Plug-in hybrids are particularly popular with the Swedes

Question

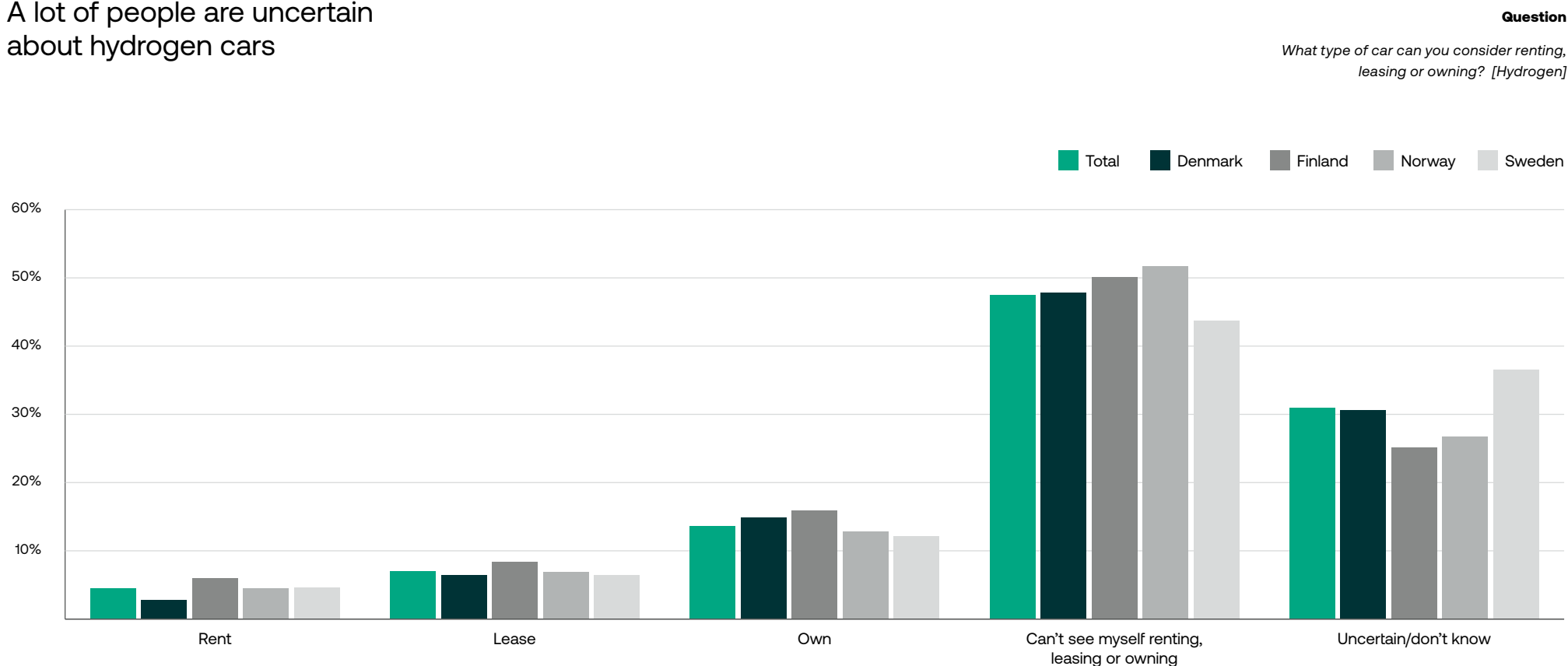
What type of car can you consider renting, leasing or owning? [Plug-in hybrid]



3.4 Hydrogen cars

Hydrogen cars aren't that common and it shows in attitudes. 3 out of 10 people in the Nordics are uncertain about them and almost half, 48 percent, can't see themselves renting, leasing or owning one.

A lot of people are uncertain about hydrogen cars

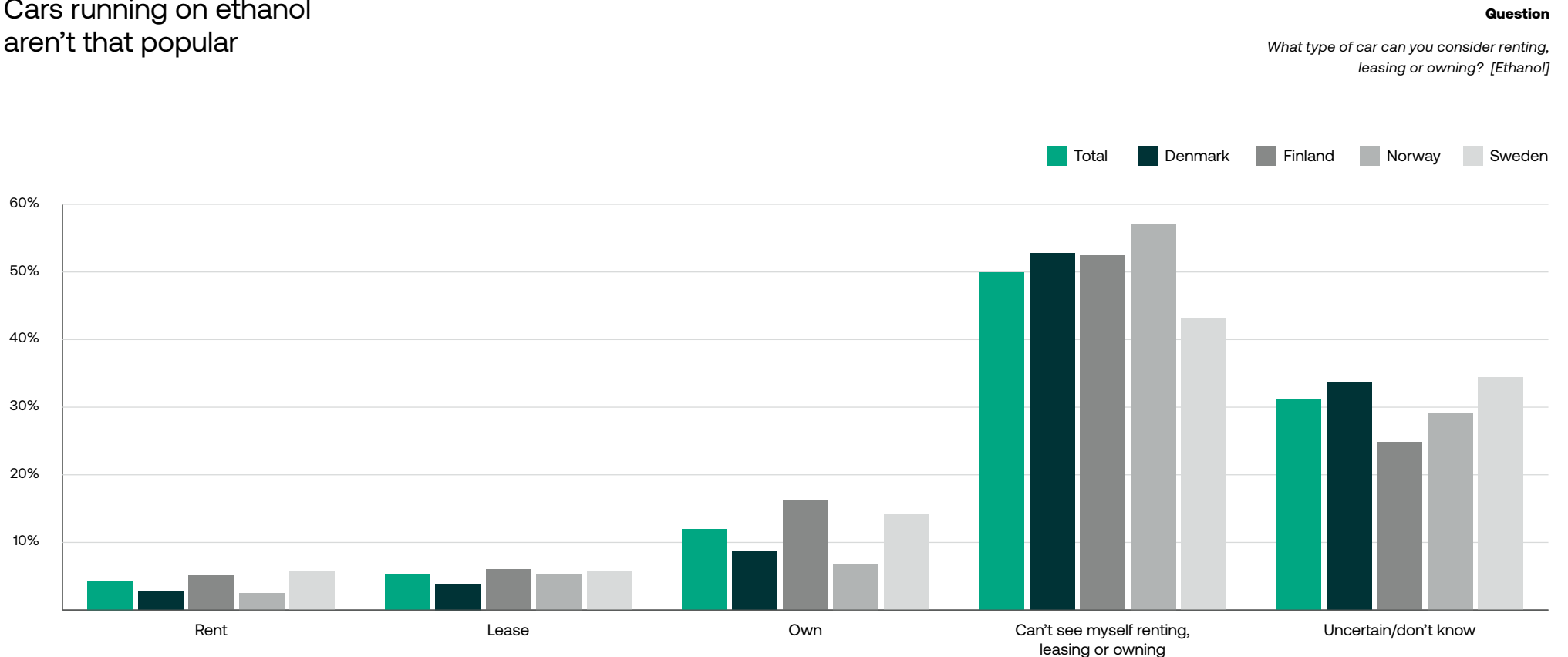


3.5 Ethanol cars

The same goes for ethanol driven cars, with the same sort of figures as for hydrogen powered cars. 1 out of 2 people in the Nordics can't see

themselves renting, leasing or owning one, and 3 out of 10 are uncertain, meaning they probably don't know what it is.

Cars running on ethanol aren't that popular



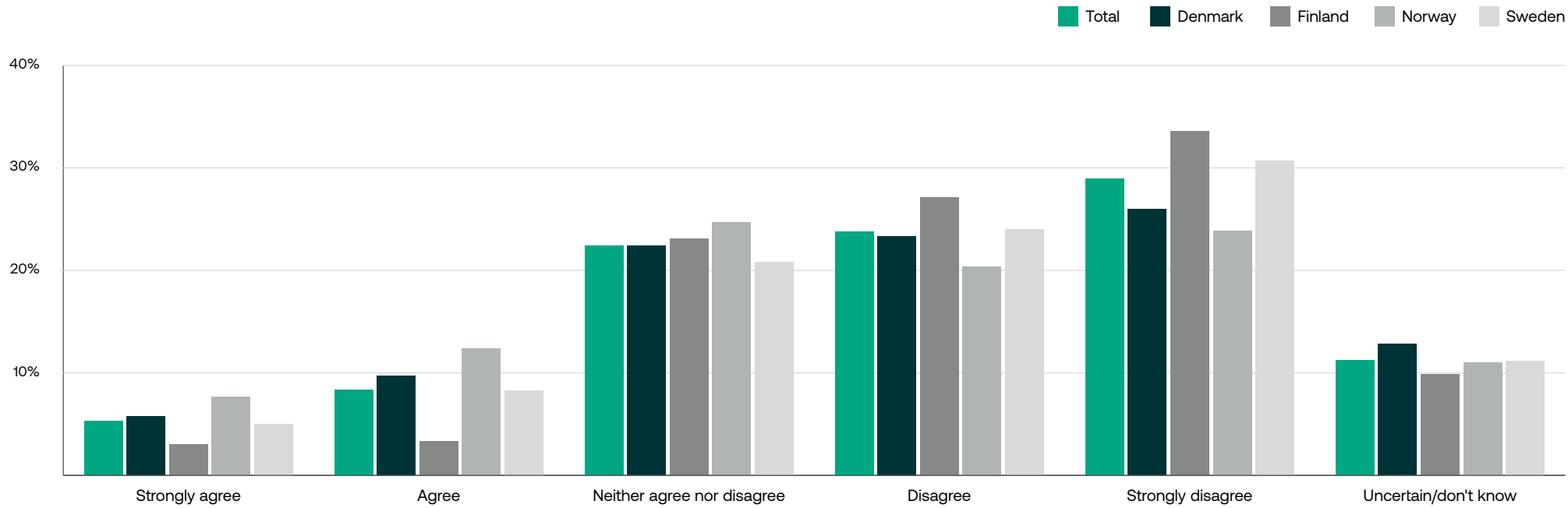


4. Strong belief in the future of the car

Only 1 out of 10 disagree with the statement that cars will be a part of the future while 6 out of 10 agree with it. Once again, Norwegians are the most optimistic about cars. Maybe this has something to do with Norway being the country where the green mobility revolution has come the furthest? Clearly, when picturing a car there's a variety of different options one's mind might come up with, from older gas-guzzling sportscars to quiet and futuristic electric SUV:s. And maybe when the latter are more prominent in ones society, one might be more inclined to think the car is here to stay?

Most people believe the car is here to stay, especially the Norwegians

Statement
I would never buy a car that wasn't electric



5. Sustainability is partly about circularity

The green revolution is not only about buying a new car with low emissions. Closely related to the green revolution is the concept of the circular economy, where we re-use old materials and make our current things last longer. Because sometimes the greenest consumption is the one you don't do.

It's often more environmentally friendly to service your current car compared to buying a new one. In this year's Mobility Barometer there is a bit more focus on a part of being green that sometimes gets forgotten; The part where we make what we have last longer.



5.1 Service your current car vs getting a new one

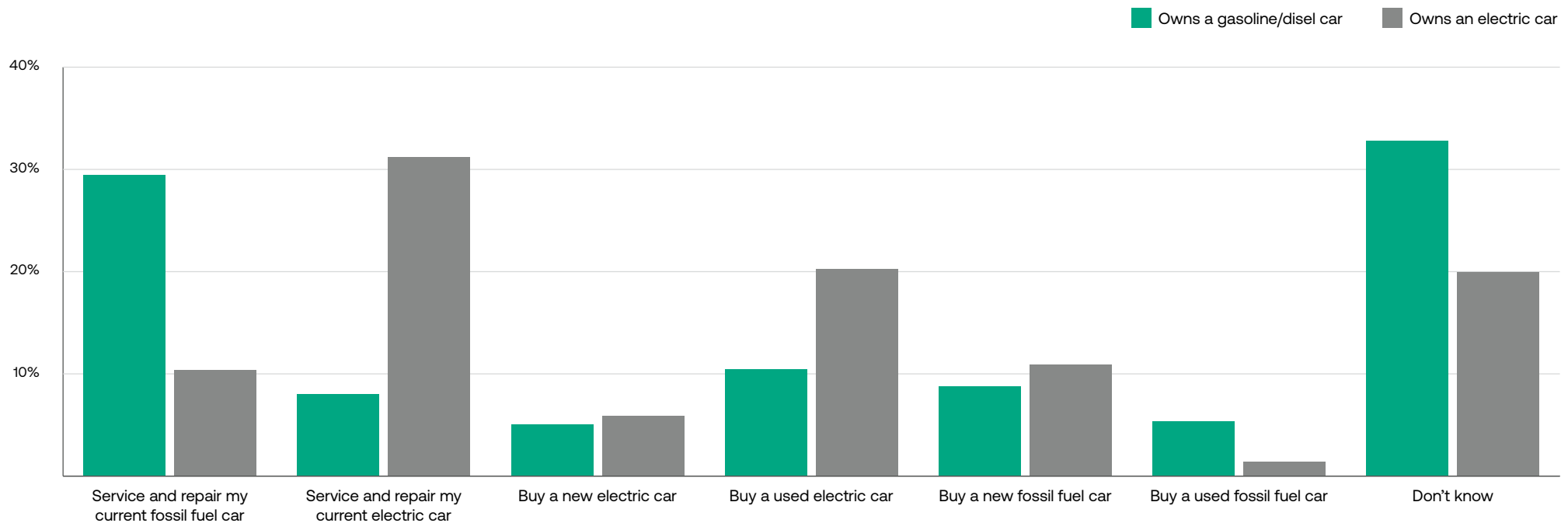
The people of the Nordics get it – sometimes it's better for the environment to service your current car than get a new one. To get a better understanding of how environmentally knowledgeable the Nordic people are, they were asked whether they think it's better for the environment to service their current car or buy a new/used one. Because of how the question was asked, the results are shown only for car owners and divided depending on which car one owns.

People who own fossil fuel cars are almost split between not knowing what's the best option and thinking it's about servicing and repairing their current vehicle, with slightly more not knowing. Meanwhile, electric car owners understand that it's better to service their current car with 31 percent picking that option. An equal amount of 20 percent think it's better to buy a new electric car as the amount of people who don't know.

One in three are confused about how to be sustainable

Question

Out of the following options, what do you think is the most sustainable when it comes to car ownership?





5.2 What matters when we're servicing our car

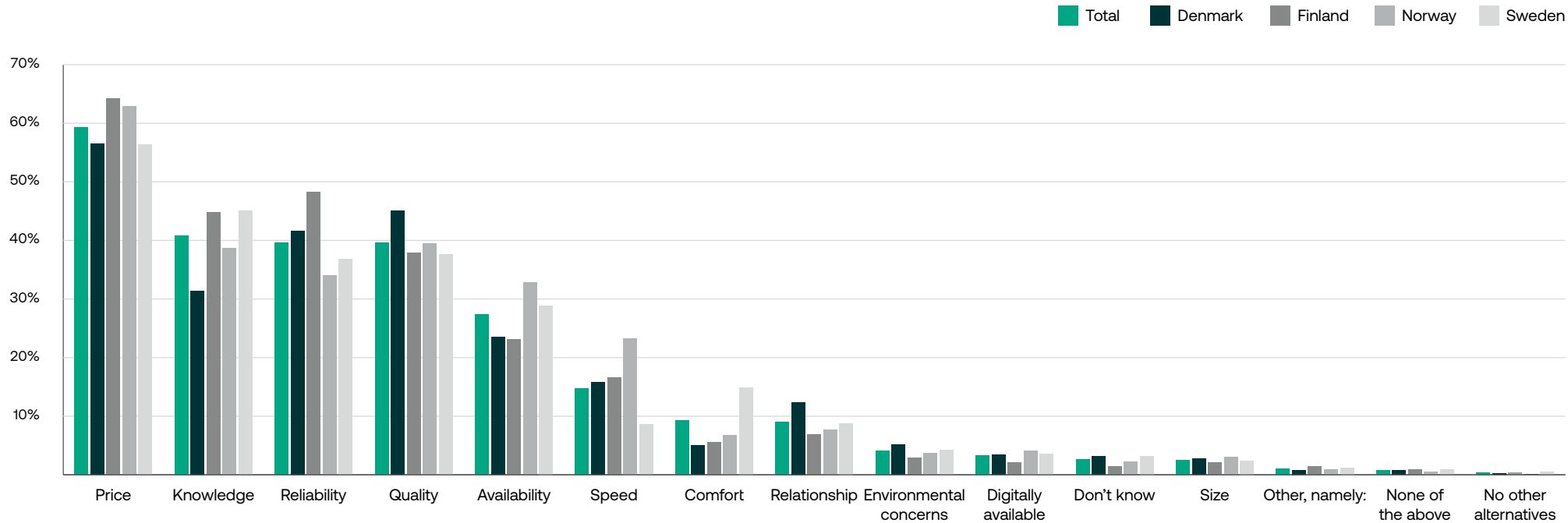
If servicing your car is the most environmentally smart choice, what's the best way to get more people to service their car?

One way to figure that out is to look at what decides where the Northerners service their cars. Almost 6 out of 10 answers price, which is not surprising considering the current economic times. Otherwise, there's small differences between the countries. But Finns value reliability a bit higher (48 percent), Danes quality (45 percent) and Swedes speed (23 percent), compared to their Nordic counterparts.

Price is what matter the most when picking a place to service your car

Question

Which of the following determines where you choose to service your car?



Where we want to service our car

With the continuous evolution of technology, we are getting more and more used to getting what we want, when and where we want it.

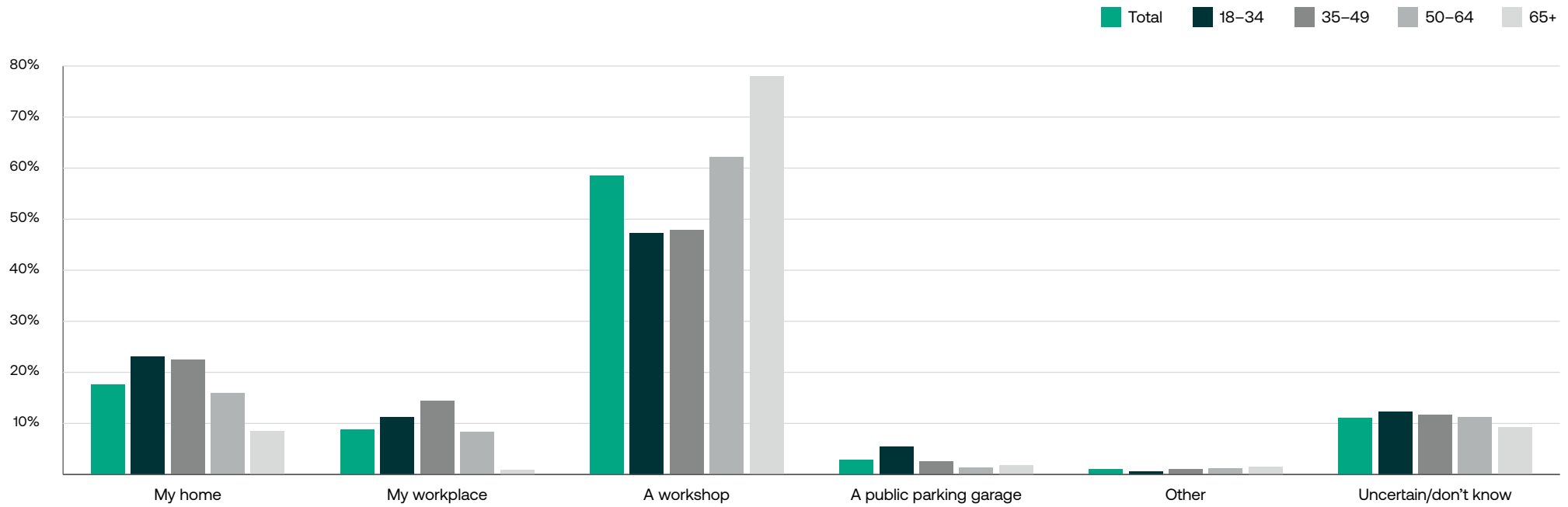
When it comes to service though, the traditional place to get service, at the shop, is still the most popular option. However, it's clear that this might be shifting with the times, as people under 50 are much more open to servicing their cars at another place than at the shop. Around half of the people between 35-49 would prefer to service their car in the shop. For people over 65, this number increases to 78 percent.



Shifting attitudes

Question

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





Willingness to service your car and attitudes towards spare parts providers

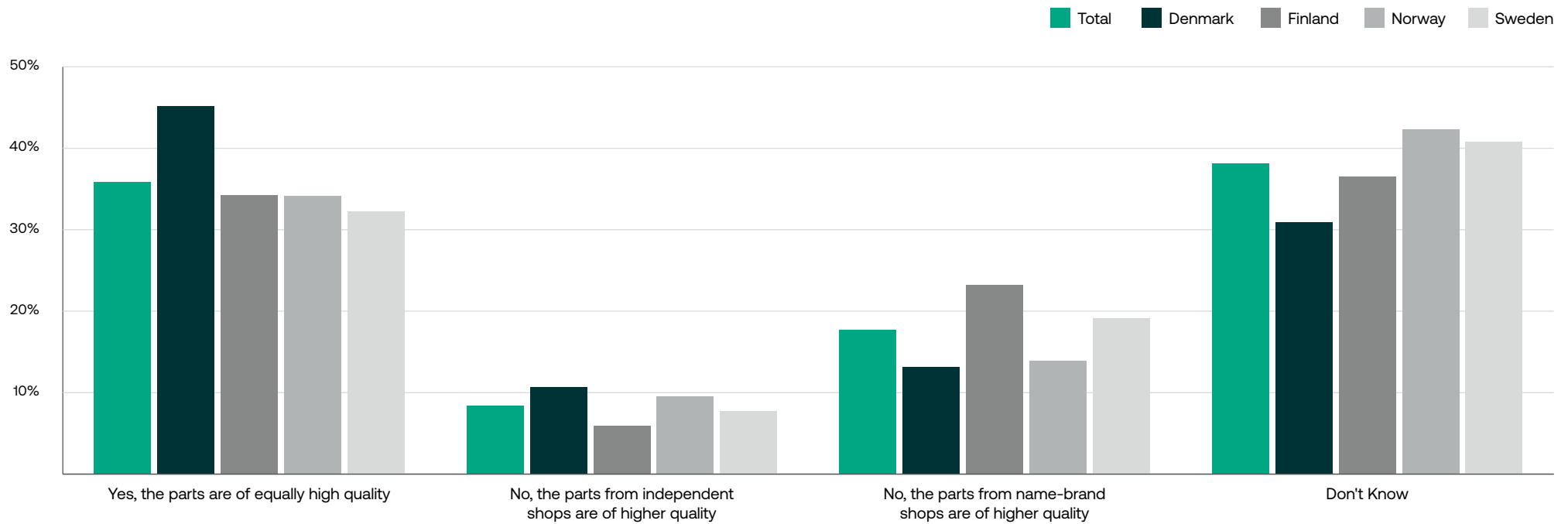
Are all auto-shops and parts made equal? There are many alternatives to where one might service their car, but usually the workshop fall into two different categories; Either they are name-brand shops, or independent ones.

In this year's study people were asked about their attitude towards spare parts from independent or name-brand shops, and which one they think are of higher quality. Notably, a lot of people don't know the answer, with 38 percent picking that option. Almost as many, 36 percent, think that the quality is the same. Half of that amount, 18 percent, think that spare parts from name-brand shops are of higher quality.

A lot of people don't know that much about spare parts

Question

Do you think that the quality of spare parts is equal or differs between independent and name-brand shops?



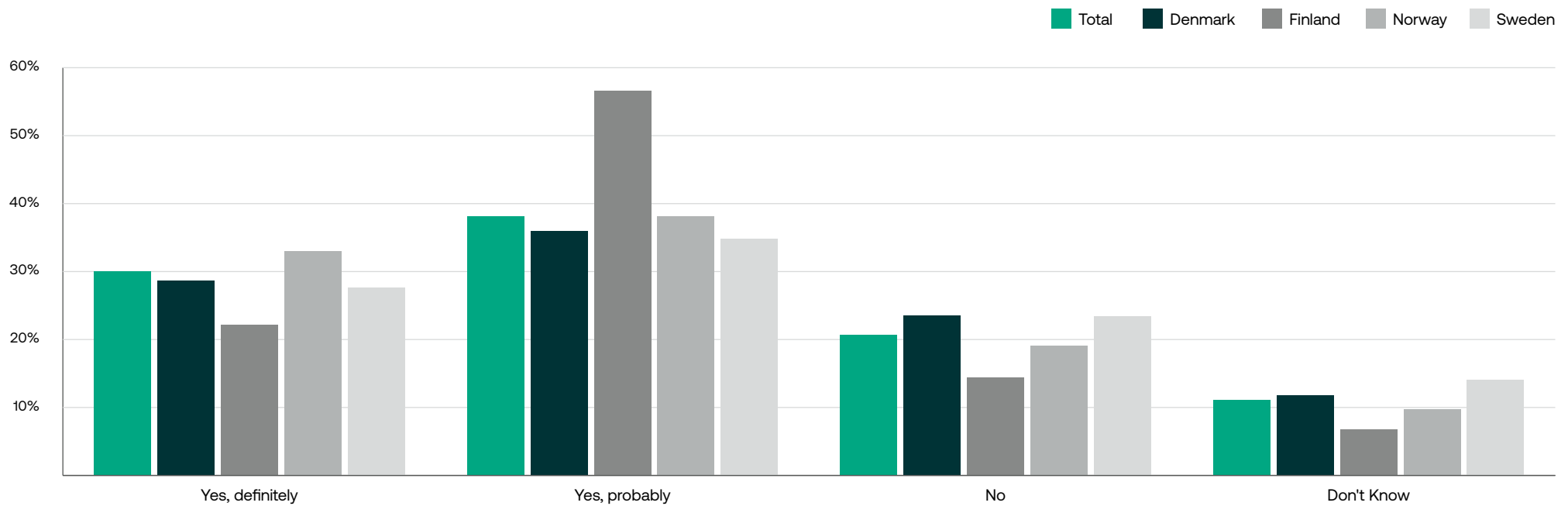
Turning specifically to electric car owners, they were asked if they were willing to service their car at an independent shop or if they preferred name-brand ones. Almost 7 out of 10 electric car owners have no problem servicing their car at an independent shop. The highest support is in Finland where 79 percent says they are willing to, and the lowest support is in Sweden with 63 percent willing electric car owners.



Electric car owners attitude's towards service

Question

Are you willing to service your electric car at an independent shop instead of a name-brand one?



6. Into the future of mobility

Looking forward – what trends in car ownership and usage can we expect? The car might be over 100 years old, but the possibilities of it keeps expanding. What will be the future trends to keep an eye on and what changes in car owner and usership are taking place?





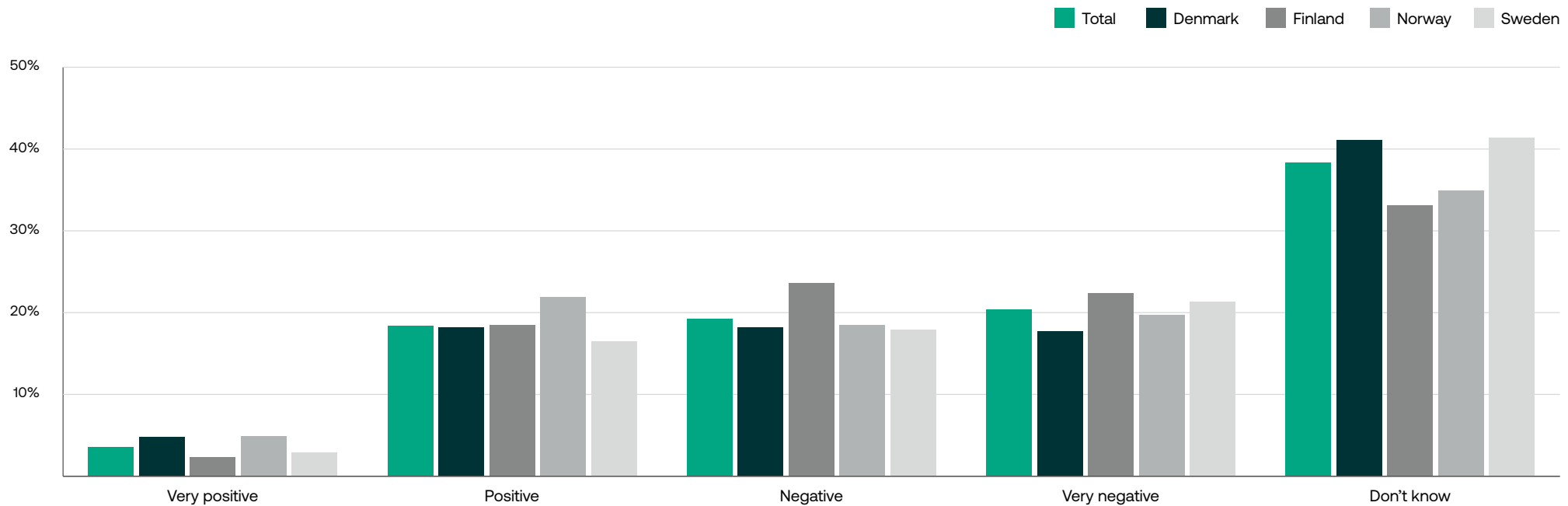
6.1 Subscription based models

Would you pay an extra fee every month to be able to digitally unlock the seat warmer? Or go 20 km/h faster? This might seem like a ridiculous question, but it's a real one for some car owners.

The Nordic people in general are reluctant, they on average against them. 22 percent are for them and 39 percent against them. However, a lot of people doesn't know how they feel about subscription-based models, with 38 percent saying they don't know how they feel. Which means that it's up to a lot of car manufacturers to develop attractive solutions if this is going to be something that stays around in the future. If they are able to convince the people who don't know how they feel about them, they might get a big shift in attitudes in favor of the model.

Are subscription-based models popular? Not according to the Nordic people

Question
Many car manufacturers are introducing subscription models where car buyers pay extra every year to get access to certain functionalities, for example the possibility to drive faster. What is your attitude towards such subscription models?



6.2 Sharing is caring (but not with my data)

The ability to collect data from or digital devices creates new opportunities as well as challenges. With better data our ability to tailor services to the individual becomes better but giving up too much data is rarely something that everyone is willing to do.

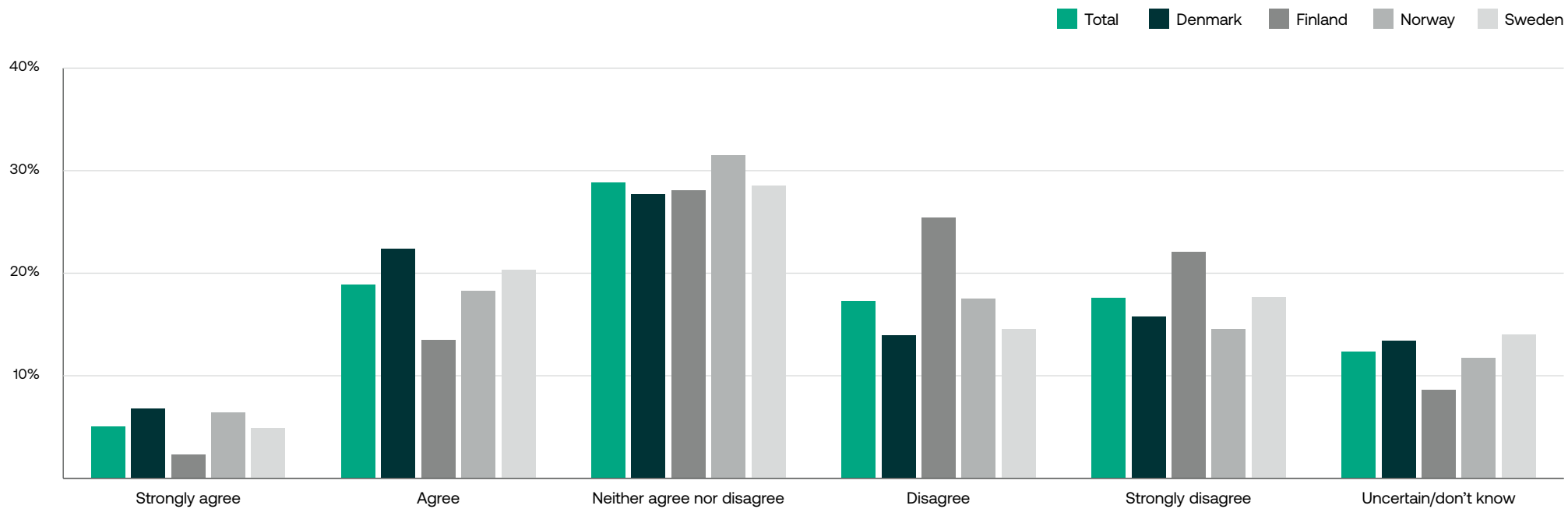
The people of the Nordics are on average against letting their car collect data on them to improve the services they are provided, with 11 percentage points more disagreeing with the statement compared to how many that agree with it. The Finns are the most negative, with 32 percentage point more disagreeing with the statement, compared to the Danes. They are much more ambivalent and almost an equal amount of people agree/disagree with the statement.



Not too many are thrilled to share their data

Statement

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





Electric car owners stands out

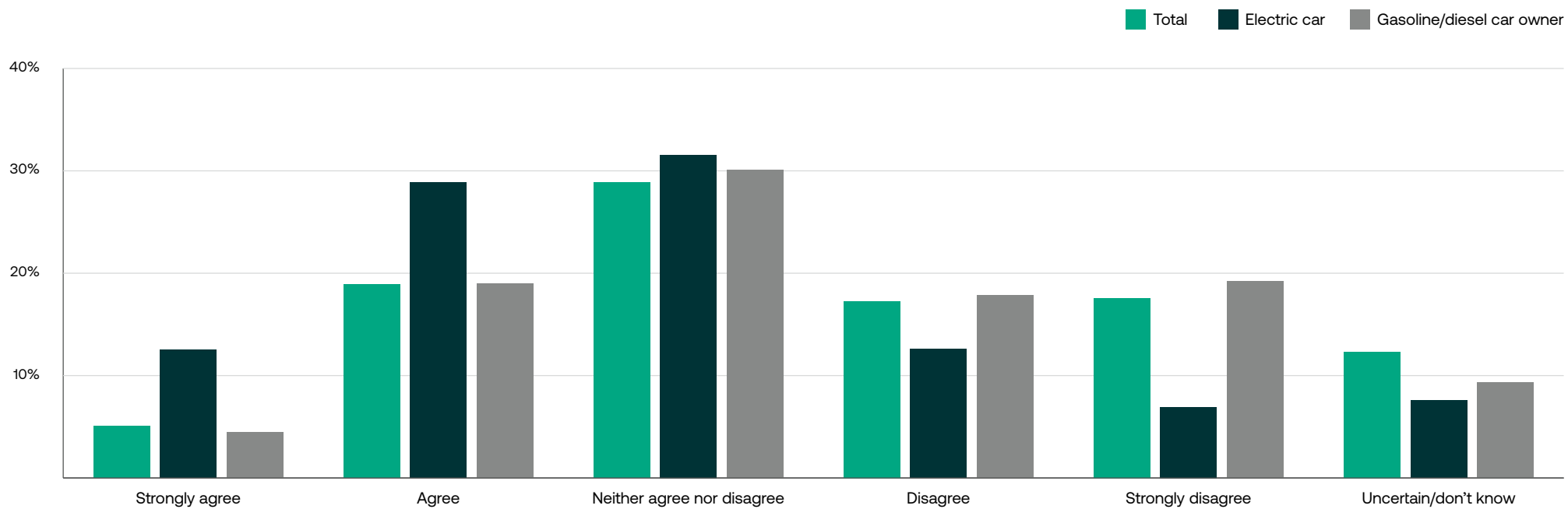
Maybe it's about feeling like a part of the future, or maybe it's about having more trust in technology, but electric car owners really stand out when it comes to being open to sharing their data.

22 percentage points more electric car owners agree with the statement, making them very positive towards sharing their data for some type of benefit. This can't be said about gasoline/diesel car owners where instead 14 percentage points more disagree with the statement, making that group on average negative towards sharing their data for improved services.

Car ownership are linked to attitudes towards data-sharing

Statement

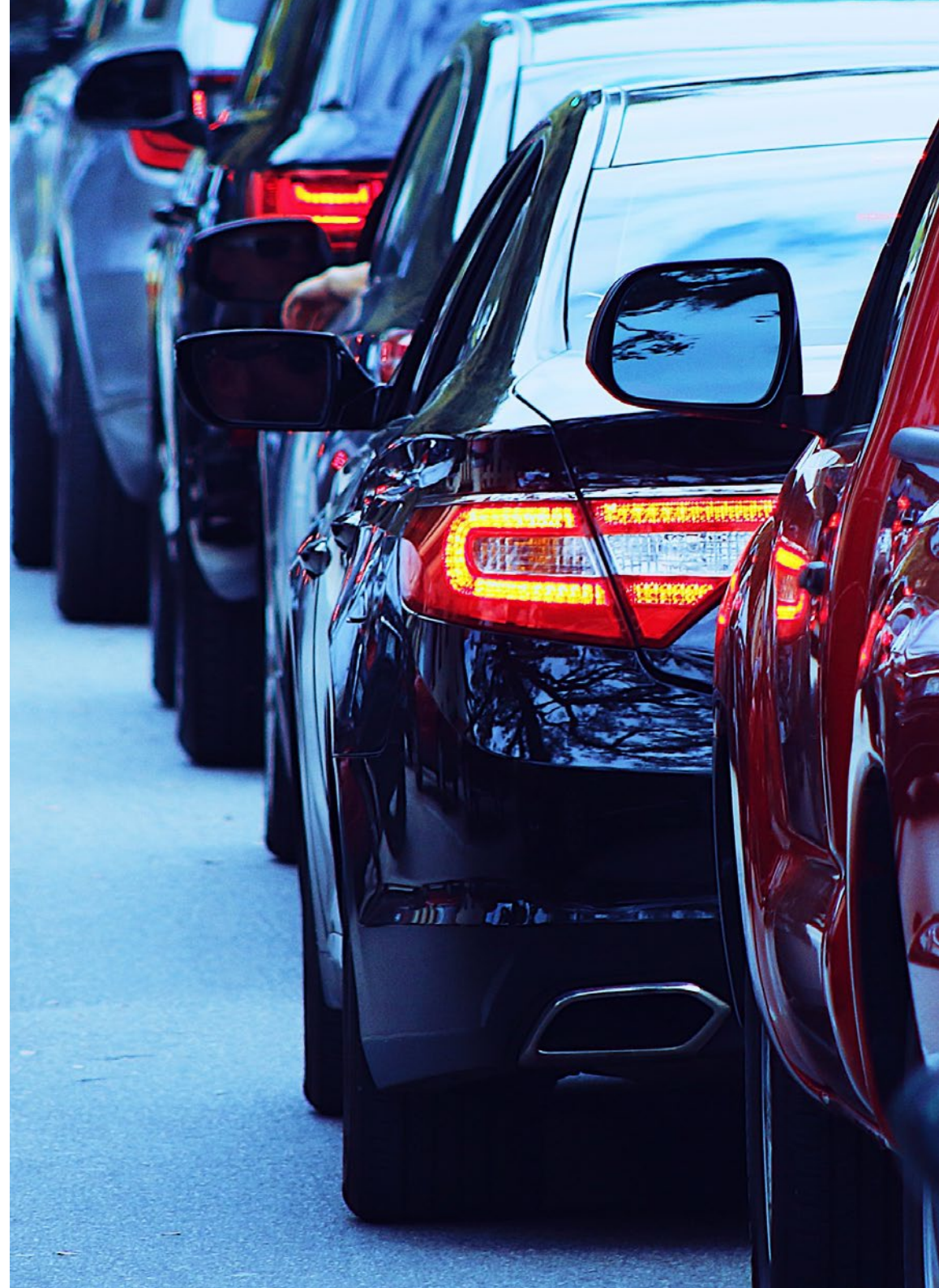
It's ok if my car collects data on me to improve services that can be provided to me



What might get the hesitant to change their minds

So, if people aren't too keen on sharing their data, what might make them change their minds?

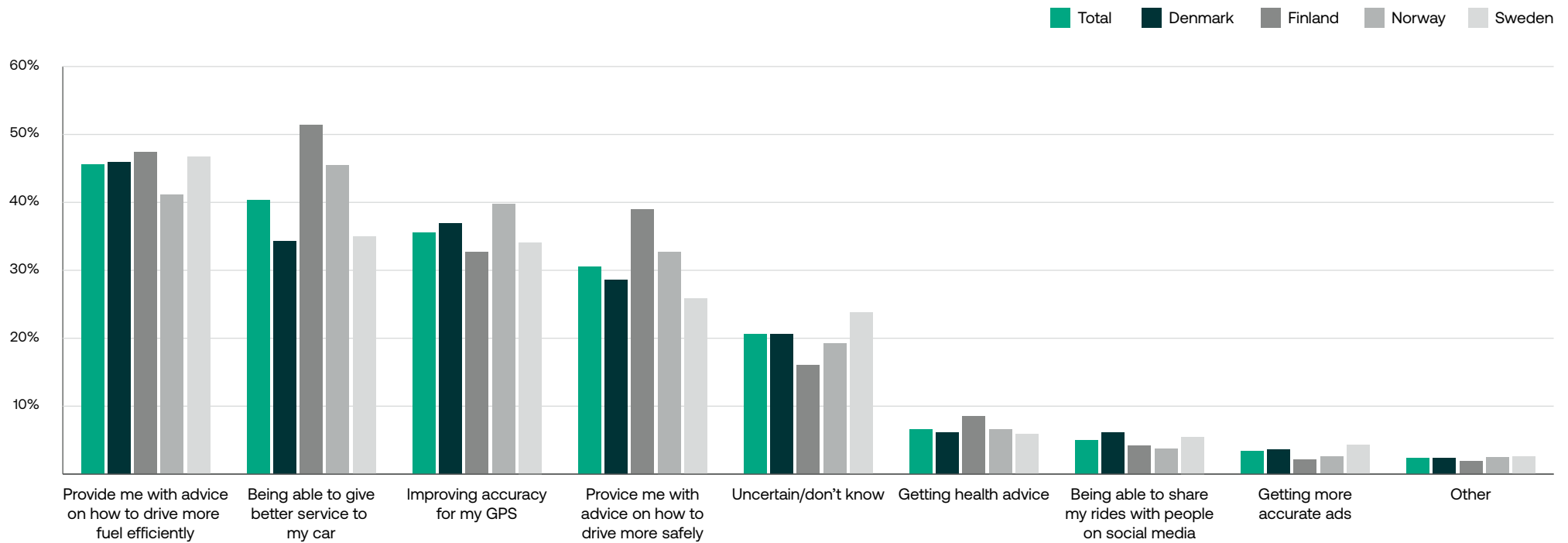
Given the increase in fuel and electricity prices, it's not surprising that people want to get the most out of their cars. 46 percent would like to know how they could drive more efficiently, and 40 percent would like that their data be used to give better service to their car. This is especially important for the Danes, where 51 percent of them value improved service the most when it comes to the type of service they would like to be offered in return for their data.



What do people want their car data to be used for?

Question

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



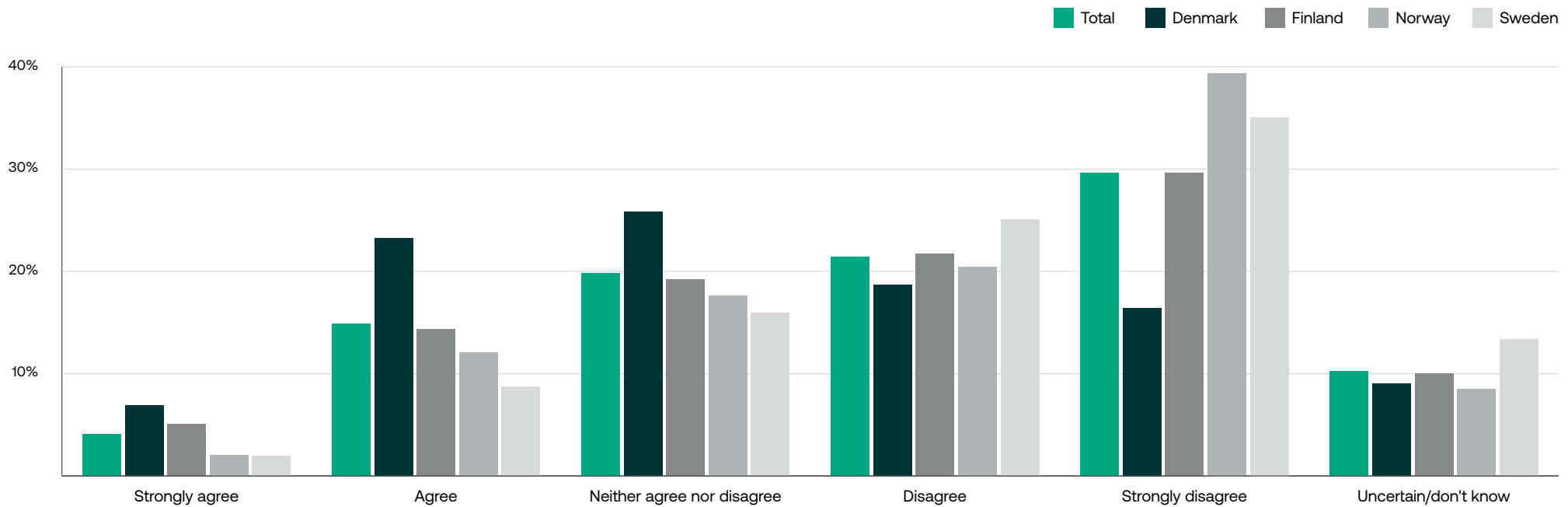
Car sharing: younger vs the not so young

Data-sharing is one thing, but how about car-sharing? Two things are clear. First, on average people tend to be against sharing their car with others. Secondly, young people are much more positive towards car-sharing. 30 percent of people between 18-34 see themselves sharing

Young people are more positive to sharing their car with others

Statement

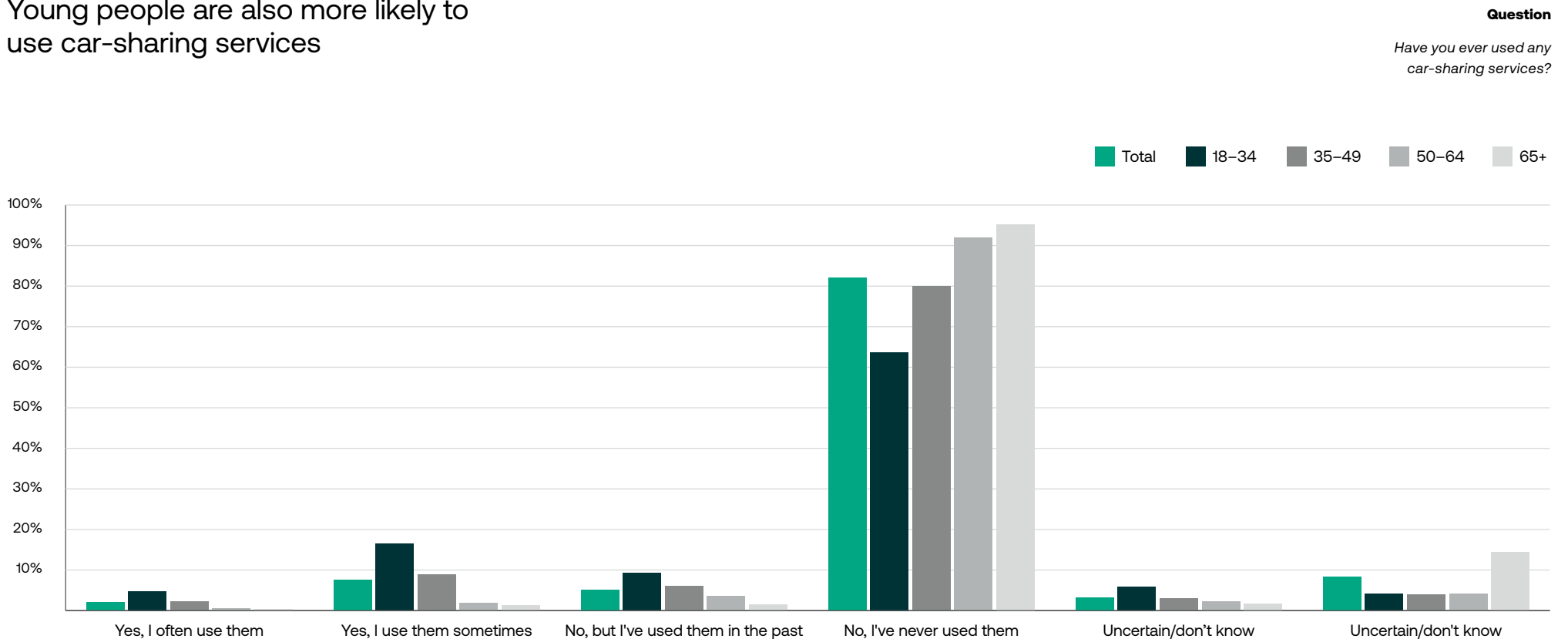
I can see myself sharing my car with other people



their car with other people, whereas only 11 percent of people over 65 say the same thing. Not only are young people more positive towards sharing their car, but they are also more likely to have used car-sharing services. While 9 percent of the Nordic population at a while use

car-services, 21 percent of people between 18-34 use them. On the trail towards the sharing-economy, young people are leading the charge.

Young people are also more likely to use car-sharing services



This is MEKO AB

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.

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 Northern Europe and present in Denmark, Estonia, Finland, Latvia, Lithuania, Norway, Sweden and Poland, 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 needs of our customers. Through proactive and innovative investments in all our markets, we can continue to lead the development for mobility.

– **Petra Bendelin, Director of Business Development,
Strategy & Sustainability at MEKO AB**

MEKO