



Euromonitor
International

Voice of the Consumer: Mobility Survey 2026 Key Insights

July 2026

EXECUTIVE SUMMARY

Why read this report?

EXECUTIVE SUMMARY

Key findings

INTRODUCTION

Three forces reshaping the automotive and mobility landscape

One in two workers commutes every weekday globally, anchoring personal car demand

Personal cars anchor commuting globally but shared mobility reshapes demand unevenly

INTRODUCTION

Three forces reshaping global mobility

SUSTAINABILITY DRIVES EV ADOPTION DESPITE COST CONCERN

EV ownership scales steadily as affordability infrastructure shape regional trajectories

EV growth led by educated youth but slowed by cost barriers

Six segments reveal where EV marketing yields the highest return

Purchase price is the dominant EV barrier; sensitivity rises with age

Emerging markets lead sustainable EV adoption willingness

BYD wins Gen Z and Millennials in Mexico through TikTok cultural participation strategy

Targeted growth levers to convert EV intent into market share gains

AUTONOMOUS VEHICLES REVOLUTIONISE URBAN MOBILITY

Level 3 scaling accelerates while Level 4 remains constrained globally

One in three global consumers are confident in fully autonomous vehicles

AUTONOMOUS VEHICLES REVOLUTIONISE URBAN MOBILITY

Gen Z and Millennials drive early autonomous mobility openness

Grab and WeRide build Southeast Asia's first robotaxi corridor through phased co-trial

Gen Z prioritises safety-led driver assistance over full autonomy

AUTONOMOUS VEHICLES REVOLUTIONISE URBAN MOBILITY

Strategic implications for autonomous vehicle adoption

FLEXIBLE VEHICLE FINANCING FUELS SUBSCRIPTION GROWTH

Subscription expands vehicle financing options

Monthly car subscriptions gain ground but remain a secondary choice

Sixt accelerates flexible vehicle subscription backed by Stellantis partnership

Connected car feature payment models diverge across regions by value perception

Subscription model reshapes automotive revenue and ownership models globally today

CONCLUSION

Recommendations

Mobility shifts from affordability-driven growth to ecosystem and service-led future

Questions we are asking

Definition: Light vehicle sales by level of autonomy (0-5)

Definition: Generations

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