Mobility Barometer 2024

The most comprehensive survey on mobility trends in the Nordics

WHY THE ELECTRIC CAR RALLY IS LOOSING SPEED

ONE IN THREE: ELECTRIC CARS ARE ONLY FOR THE RICH

ARE WE READY FOR TOUGHER TRAFFIC REGULATIONS IN CITIES?

WHAT TO CONSIDER WHEN GOING ELECTRIC

WHAT WE THINK ABOUT SELF DRIVING VEHICLES

OUTLOOK: MOBILITY AND CARS IN THE NEXT DECADE

MEKO

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This is MEKO

In-depth data study

“The most awkward road trip of my life gave me new insights

I was young, with a thin wallet, and needed to cross the US. Luckily, there was a free car-sharing service – though it did lead to arguments in the middle of the prairie. Today, however, there are many more refined transportations offers available. But are we satisfied with them? What do we think about the developments around electric cars and smart technology? You have the answer in front of you: The Mobility Barometer 2024 – the largest survey of our mobility habits in the Nordics.

The free service was ingenious. A car company in the US needed to move cars from A to B. To avoid paying drivers, they used people like me, who drove voluntarily. In this case, I was not the only one wanting to go. Some other Swedes that I met nearby also wanted to travel to California. A sort of carpooling service, in other words.

I was told to “just relax”
One of the others took the wheel, and the journey started off well enough. But the car was old, and the fuel gauge swung back and forth as we rocked along, making it hard to see how much gas we had. I suggested that we should probably refuel to avoid running out of gas in the middle of the prairie. “No, just relax,” the driver explained with a crooked smile.

Soon, he also started zigzagging over the road reflectors, making a rumbling sound. “Great fun!” he thought. In the middle of one rumble, there was a bang, and the car started to sputter.

There we were, stuck, with a flat tire and out of gas. Two long days later, we finally arrived in California, parted ways and never saw each other again.

I realized two things: I had just completed the most awkward road trip of my life, and even though the free service was ingenious and got me where I needed to go, the experience also played a significant role. We had the same goal in that car, but we had, to say the least, different preferences for how the journey should go.

Details often guide our choices
Today, there is a plethora of mobility services. It has become an integral part of our modern society. The overarching goal is the same – to get us from one place to another in a purposeful way.

But how we perceive details, and the overall experience is often crucial in determining exactly which solution we choose. This is also evident in this year’s edition of the Mobility Barometer, conducted by MEKO for the third year in a row.

The results are intriguing. An economic downturn and rising interest rates have,

Facts/Mobility Barometer

The Mobility Barometer is the largest survey of its kind in the Nordics and is conducted on behalf of MEKO.

Over 4,000 people in Sweden, Norway, Finland, and Denmark are asked about their views on various modes of transport, the development of electric cars, new technology, traffic safety, and sustainable car ownership.

The survey was conducted online with randomly chosen respondents over 18 years old, between 8 and 17 of July, 2024. In each country, more than 1,000 people completed the survey, with the total number of respondents being 4,026.

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

The 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.

for example, dampened interest in electric cars. Many even believe they are “only for the rich.”

That’s why we conduct the largest mobility survey in the Nordics
MEKO aims to be the most comprehensive partner for everyone who drives, repairs, and maintains vehicles in Northern Europe. Part of this involves driving the transition towards more long-term sustainable mobility, where we, for example, develop offers that reduce carbon footprints.

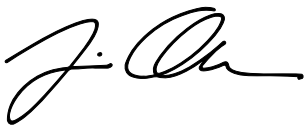
This involves meeting the service needs of traditional and electric cars as accessibly as possible, working to reuse spare parts in new ways, or launching new services for a more modern car life. To achieve this accurately, we want to know what and how the public thinks. This not only gives us valuable insights but also moves us forward as a company.

As a young traveler in the USA, I also moved forward. I eventually reached California – with new insights. Just as I realized the importance of the journey’s experience, successful companies acknowledge that understanding detailed preferences is crucial over time.

To get there, one must find out the essential facts.

Enjoy your reading!

Pehr Oscarson, President and CEO, MEKO



The electric car rally slows down – and more people complain about high prices

Electric cars are often considered essential for the green transition, yet one in three people in the Nordics disagree. Support for electric vehicles has clearly decrease as more people are deterred by steep prices, according to this year's Mobility Barometer. At the same time, there is a deep divide on the issue, with one group standing out.

We need to make transportation greener to reduce climate-damaging emissions, and electric cars are necessary to achieve this shift. This message has been promoted daily for several years, across various contexts and countries.

However, in 2024, electric cars have been publicly questioned more than before. Critics have pointed to everything from the relatively short range to their high prices, and not least, the resources required for their production – factors that could challenge their label as "environmentally friendly."

A new survey reveals significant division
For the first time, the Mobility Barometer asked the public in Sweden, Norway, Finland, and Denmark whether they believe electric cars are essential for the green revolution.

The fact is, far from everyone agrees. A total of 29 percent dismiss the idea, while 30 percent see electric vehicles as a must for the transition. Almost as many, 28 percent, have no opinion, and a smaller portion is unsure what to think.

Beneath the surface, there are significant differences between countries, with Finland and Norway standing out.

In Finland, 37 percent reject the idea of electric cars as enablers of the green shift, with only 22 percent in favor. In Norway – the country where electric cars are most common – noticeably, 36 percent believe electric cars are not necessary for the green transition, while 26 percent believe they are. In Sweden, more people view electric cars positively in the green transition than those who don't, with 33 percent in favor versus 23 percent against. However, the country that has the most faith in the sustainability of electric vehicles is Denmark. Here, 36 percent believe that electric cars are a must, while 25 percent do not.

The impact of financial constraints
Meanwhile, daily life has become tougher for many since the last edition of the Mobility Barometer was published. Rising interest rates, the high cost of living, and tighter wallets have dampened car buyers' interest. Additionally, electric car subsidies have disappeared in countries like Sweden and Norway, contributing to a decreased desire to own or lease an electric car.

Two years ago, 27 percent said no to the idea – today, that figure has risen to 31 percent, with the strongest opposition in Finland.

A full 40 percent of those who cannot see themselves driving an electric car cite that they simply cannot afford one, making this the most common reason – two years ago, that figure was 34 percent. Sweden has the biggest issue, with half of the respondents pointing to the price as the main barrier.

In short, money talks, and a significant portion of the public believes that electric cars are "only for the rich" (see text adjacent).

A divided world within the same countries
But the world is not black and white, nor is it in the Nordics. We live in what can feel like divided worlds, even though we belong to the same country and region. Urban areas often see rapid development – with investments in bike lanes, charging stations, public transport, and a variety of mobility services – while the pace of change looks entirely different in smaller towns and rural areas.

This contrast is also reflected in our views on electric cars.

City dwellers in the Nordics have a distinctly more positive view of battery-powered vehicles. More people in urban areas believe that the green revolution requires a shift to electric cars, whereas in rural areas, the opposite is true.

There, more people do not believe electric vehicles are necessary.

Among those who are hesitant to own or lease an electric car, 18 percent of city dwellers cite poor access to charging stations as the reason – in rural areas, this figure is more than double, at 38 percent.

One group stands out – and signals the future

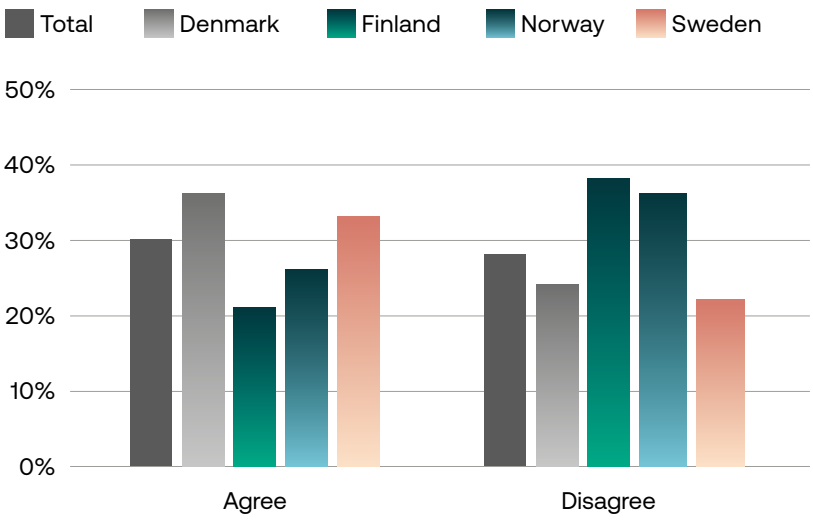
We also live in divided worlds in another way, according to the survey, and it has to do with age.

Younger people are generally much more positive about electric cars than older generations. Nearly four out of ten under 35 see electric vehicles as necessary for the green revolution, while only one in five in the same age group dismisses the idea. Resistance to owning or leasing an electric car is twice as high among those over 65, compared to younger people; 42 versus 21 percent.

So, what conclusion can be drawn?

Perhaps that new generations bring new habits. If so, this could signal a change where more and more people will choose electric cars, revolution or not.

The green revolution will not happen without a shift to electric cars



One in three believe electric cars are “only for the rich”

Nearly one in three people across the Nordic countries think that electric cars are just for those with deep pockets — and in one country, this view is particularly strong. But opinions are mixed.

The high price of electric cars is causing more people to hesitate when considering a purchase, as highlighted in the text next to this. The cost difference between purchasing a battery-powered car and a gasoline or diesel vehicle can be substantial — often a deciding factor for many drivers.

Even though more affordable models are gradually hitting the market, the debate has heated up over who these cars are really for: your everyday driver or just the wealthy?

The question is dividing people in the Nordic region, according to the Mobility Barometer.

Nearly one in three, or 31 percent, agree with the statement that “electric cars are only for rich people.”

However, this perspective doesn’t go unchallenged. Just over a third, 34 percent of respondents, disagree with the idea that electric cars are only for the wealthy, while 27 percent remain neutral.

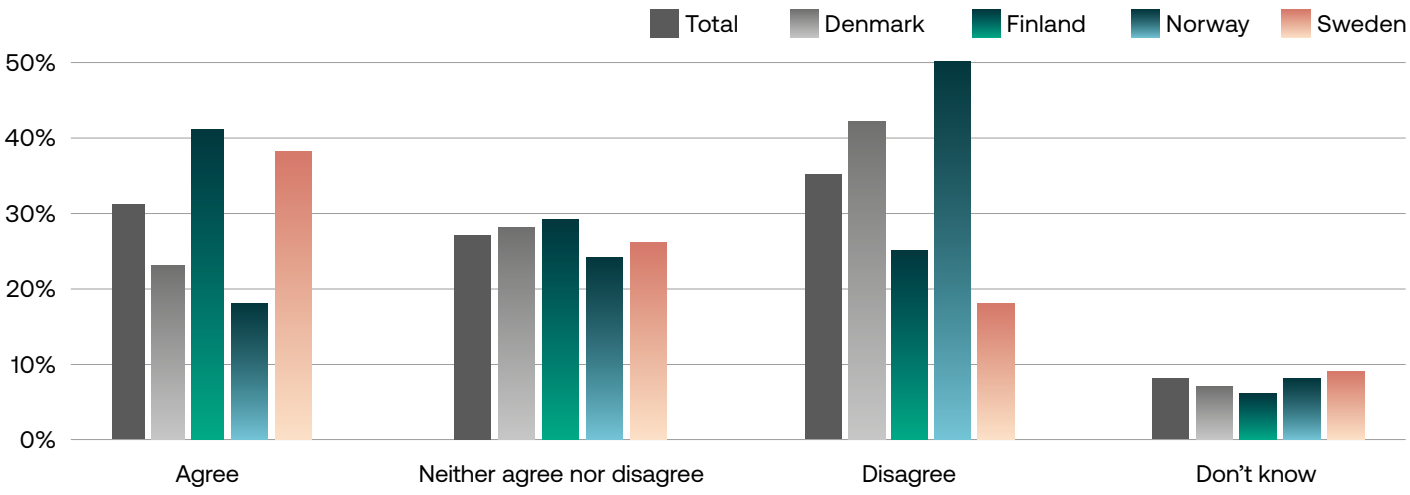
Finland stands out

Looking at individual countries reveals some clear differences.

Electric cars are most strongly viewed as “luxury vehicles” in Finland, where 41 percent share this opinion. Many Swedes agree, with 37 percent seeing electric cars as a luxury item. In both countries, skeptics outnumber those who disagree with the notion that electric cars are just for the rich (25 percent in Finland and 28 percent in Sweden).

Support for electric cars is highest in Norway, where they’ve been on the roads for many years and are considered accessible to almost everyone. Here, fewer than one in five, or (18 percent), believe that electric cars are only for the wealthy, while half of all Norwegians (50) reject that notion. A similar trend is seen in Denmark, where fewer people view electric cars as luxury vehicles; 42 percent disagree, compared to 23 percent who do so.

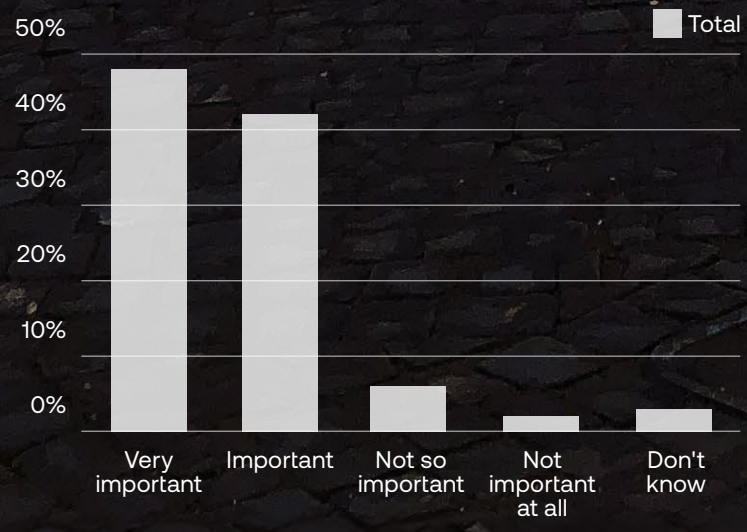
Electric cars are only for rich people.



We care about preserving – really

90%
think it is important that they can maximize their car's lifespan through service and repairs

How important is it to you that you can repair and service your car to increase its maximum life span?



Society's push for greater sustainability is also impacting drivers and the aftermarket. A vast majority in the Nordics support reusing spare parts and maximizing the lifespan of cars through maintenance and repair.

It's no exaggeration to say that the regular use of terms like "circularity" and "reuse" has become something of a baseline expectation in many industries in recent years. Society and consumers are aligning on the path to sustainability, with increased focus on preserving and maintaining what we already have.

Remanufactured spare parts gain momentum
The Mobility Barometer 2024 confirms that consumers are committed to this shift, also when it comes to maintaining and repairing cars. In fact, 65 percent believe it is positive that workshops reuse used spare parts of the same quality as new ones during service and repairs, while only 9 percent of respondents oppose the idea.

While the sentiment remains stable and positive across genders and regardless of whether the respondent resides in a major city or rural area, men tend to be slightly more positive (68 percent) compared to women (61). There are some differences between the Nordic countries as well. People in Sweden hold the most positive attitude (71), followed by Norway (66), Finland (60) and Denmark (57).

Fundamental right to repair
Repairing and servicing a car is essential for reaching its maximum lifespan, which in turn reduces costs, ensures reliable transportation, and often limits climate impact. An overwhelming 9 in 10 people believe this, while only 8 percent oppose such an idea. This sentiment is shared among both men (88) and women (91) as well as across age groups and geographies.

People in Finland see this as fundamental, with 95 percent stating that the option to service and repair your car to reach its maximum lifespan is important. Finland is followed by Sweden (91), Norway (87), and Denmark (84). At 11 percent, Denmark also holds the largest share of people disagreeing that this is important.

Shared responsibility for a sustainable future
The shift towards sustainability in the automotive aftermarket is about aligning with a more conscious society and meeting growing consumer demands, not just following regulations. This change emphasizes the importance of reuse, repair, and sustainable management of both traditional and electric vehicles. By embracing these practices, the industry can succeed while contributing to a greener future.

More on the next page:
Re-using car spare parts increasingly important →

Re-using car spare parts increasingly important

Louise Wohrne,
Head of Sustainability, MEKO

For the automotive aftermarket, the shift towards a more sustainable car fleet has sparked growing interest in remanufactured spare parts. In line with MEKO's commitment to circularity, Louise Wohrne, Head of Sustainability, emphasizes the importance of raising awareness to drive behavioral change.

MEKO has practiced sustainability principles for over 50 years by repairing and extending the life of car-related products. With the industry now facing increasing sustainability demands and scarce resources, the transition to a circular society is imperative.

Working with stakeholders and industry partners, MEKO promotes circular solutions and sustainable practices across the aftermarket in Northern Europe. Using remanufactured spare parts has become a key focus, emphasizing the need for greater awareness and proactive initiatives.

Data plays an important role
Louise Wohrne emphasizes the importance of data in demonstrating the impact of circular practices and encouraging customers to make more sustainable choices. Additionally, international initiatives in the automotive aftermarket sector are focusing on promoting spare parts that are fully remanufactured or contain recycled materials. One of these organizations is FAAS, of which MEKO is a member, with Louise Wohrne serving as its chair.

"Raising awareness includes educating consumers about the benefits of remanufactured parts and the environmental impact of their choices. When customers understand that choosing remanufactured parts reduces waste, conserves resources, and minimizes carbon emissions—while performing as well as new ones—they are more likely to choose these sustainable options," she explains.

Need for more progress
While the industry has made progress, Louise emphasizes that more focused efforts are still needed.

"This includes all industries, and the automotive industry has a very important role to play as it is resource intense. MEKO already offers products that are remanufactured as well as renting products to consumers and specialized tools to workshops," she says.

Louise adds that the industry must get better at relying on data as proof that this makes a difference, as well as offering this in a proactive way. The industry is already doing a lot in this field, so it is a lot about showing the data, nudging, and communicating this to consumers, allowing them to make informed decisions.

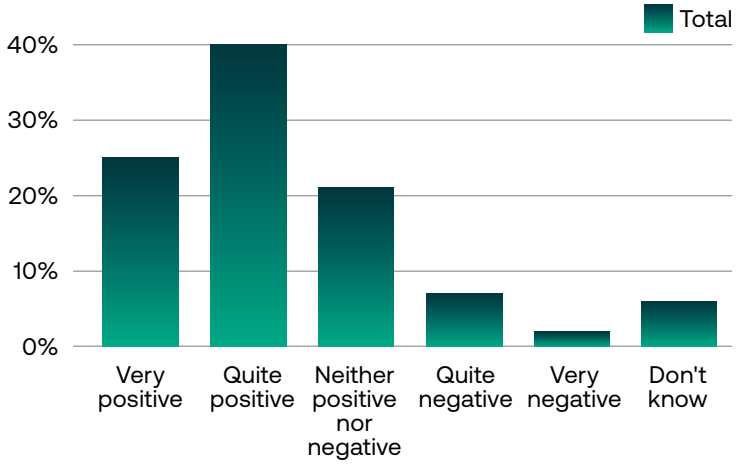
In practice, driving behavioral change through awareness often requires an array of targeted strategies. These can include informative campaigns, transparent communication about product lifecycle impacts. Offering

MEKO already offers products that are remanufactured as well as renting products to consumers and specialized tools to workshops.

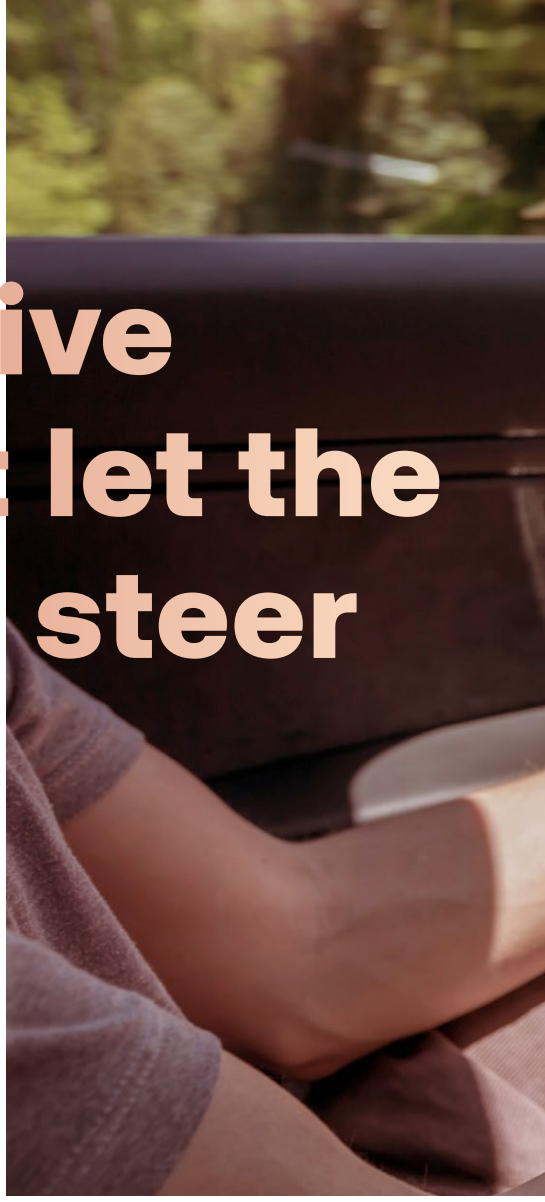
tangible data on the environmental benefits of remanufactured parts can powerfully influence consumer decisions, Louise Wohrne says.

“One main challenge, just like when developing any business model, is to make it viable and profitable. Perhaps one of the biggest questions for a company with a linear business model, is whether to incorporate these fundamental changes and go all the way. We are certain that there is a future for this type of business and are committed to promoting circular initiatives. In addition to the aftermarket, there are also great examples of companies in other sectors that challenge the industry with a circular approach, and, by that, have changed the market dynamics totally.”

What is your attitude towards car workshops reusing recycled spare parts with the same quality as new ones, during service and repair?



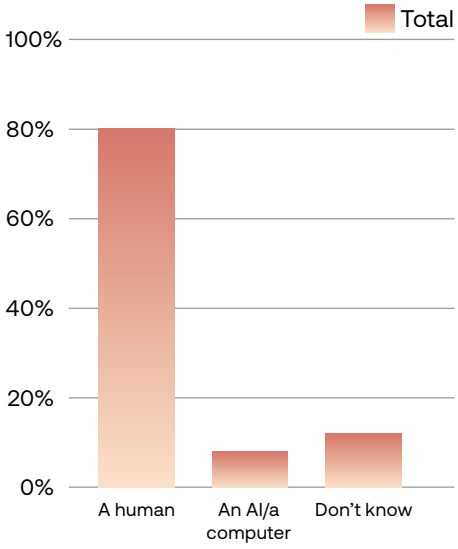
We prefer to drive ourselves – not let the car's computer steer



Would you trust a computer to be in charge of your car? You're not alone. Eight out of ten people hold negative views on relinquishing driving responsibilities to artificial intelligence (AI). Experts identify several benefits of the new technology, but there are obviously still barriers that need to be overcome among drivers.

Eren Erdal Aksoy, Associate Professor at Halmstad University, Sweden

Who do you trust the most to drive a car?



In California, the Department of Motor Vehicles already issues permits to manufacturers for testing and deploying autonomous vehicles on public roads. In San Francisco, the sight of self-driving taxis has become a common element in the bustling cityscape.

However, progress in Northern Europe has been somewhat slower. Challenging weather conditions and a perhaps more cautious outlook mean that this reality is still a few steps away.

Many in the Nordic countries seem to be hesitant about the new technology, according to the Mobility Barometer.

A clear majority of 80 percent say they trust a human most to drive a car. Only 8 percent trust a computer or AI more, while 12 percent have no preference.

The general debate about autonomous driving has undoubtedly changed.

"Have we reduced our ambition, or have we become more realistic? A bit of both, unfortunately," says Eren Erdal Aksoy, an associate professor at Halmstad University in Sweden.

"A while ago, there were many overpromises and unrealistic visions about the future. I would even say that this technology and its promise are suddenly losing momentum. We're not there yet," Eren says.

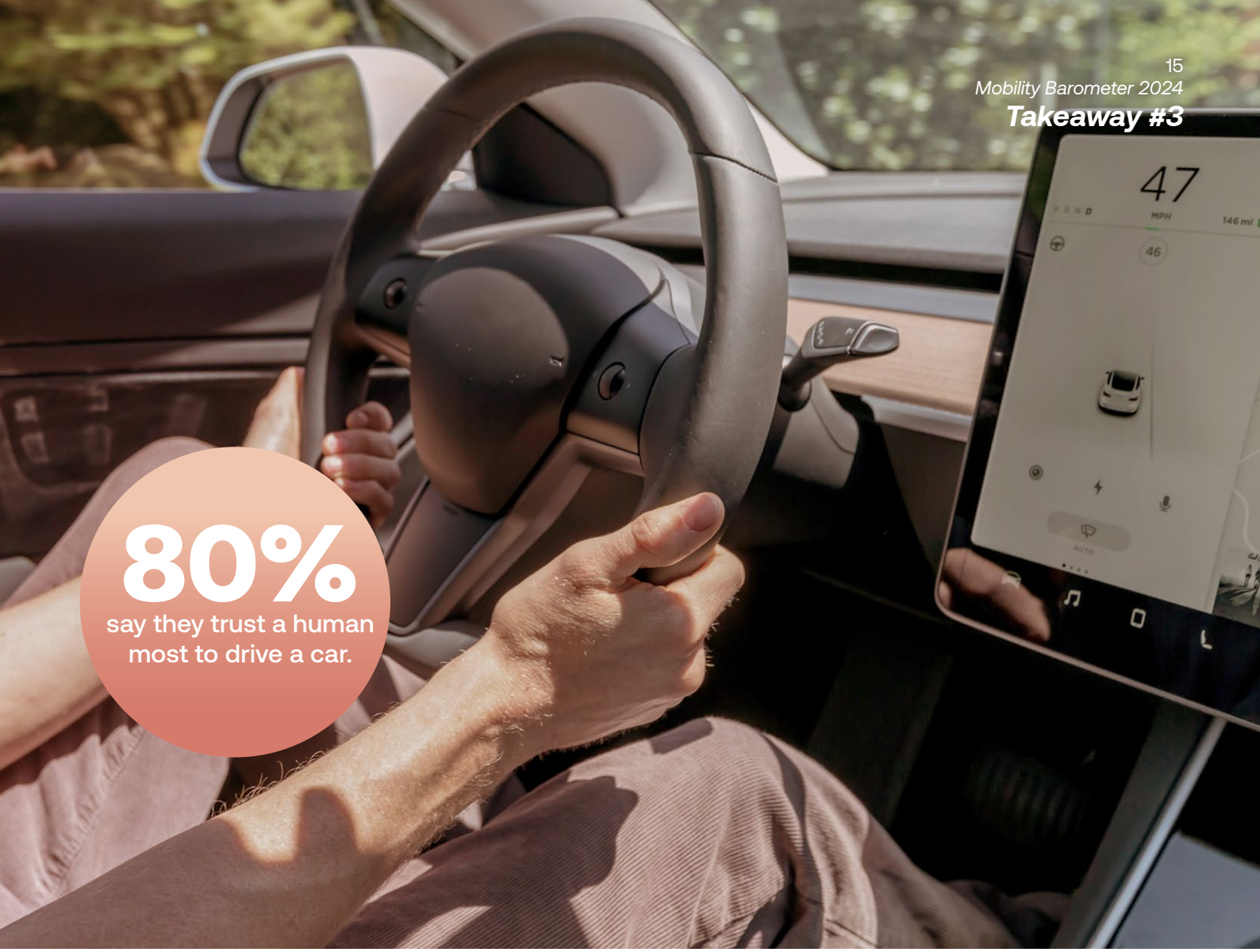
The future potential

Eren Erdal Aksoy has extensive experience in AI from some of the largest automotive companies in Europe. As the Project Coordinator for the Horizon Europe research consortium ROADVIEW, he dedicates much of his time to researching self-driving vehicles and enhancing road safety.

He explains that instead of Level 5 autonomy, which represents full driving automation, the technology we currently have is at Level 3, referred to as conditional driving automation.

Despite efforts to temper expectations, Eren is keen to highlight the benefits and future potential of this transformation.

"Safety is the most important benefit. People are prone to errors. AI will probably drive smarter and safer, which will decrease the number of incidents on the road/save lives. It will also allow better sharing of vehicles, which means there are sustainability benefits to this," he says.



80%
say they trust a human most to drive a car.

An often-overlooked benefit
Another often overlooked aspect is that self-driving cars will broaden and democratize transportation. It will make vehicles more accessible to the elderly and people with disabilities.

However, the digitalization of the industry extends beyond autonomous driving. Many envision a future with an increased focus on so called smart cities and smart mobility.

“Vehicles that are connected to traffic lights and able to communicate with each other will make transportation smarter and faster. The gains from connectivity are enormous, and this is one of the most exciting trends right now,” he says.

Several factors must be considered in this transformation, with regulations being a key concern. For instance, who will be held accountable in the event of an accident? As this technology continues to evolve, there are probably aspects that we do not know about. This, according to many, implies that we must approach it responsibly and regulate it accordingly.

The most critical aspect
Perhaps the most critical aspect of implementation is social acceptance. But we are not there yet, according to the Mobility Barometer.

Nearly one in three is negative about the general technological shift where AI is gradually taking over functions that were previously handled by the driver. This is the same proportion as those who are positive, with the remaining third being neither positive nor negative. The Danes are the most positive at 37 percent, followed by the public in Sweden (30), Norway (28) and Finland (27).

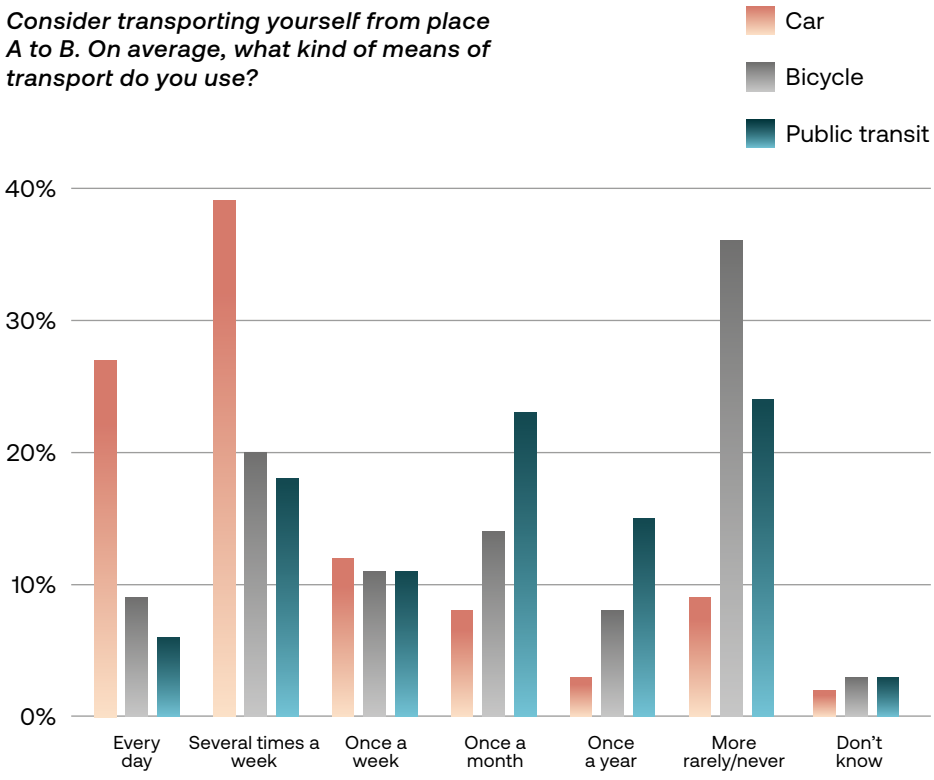
There are a few key factors to improve social acceptance, according to Eren Aksoy. One is that people feel involved, both in terms of regulations and more technically. As the attitude may differ between generations and regions, this transformation needs public support.

To address these challenges, Eren emphasizes the importance of education and transparency.
“Many people have felt left behind during other tech shifts, which applies not only to autonomous driving but to AI more broadly. We must educate people about AI and demystify it. Another important innovation for autonomous driving is continuous interaction between the AI and passengers, where it explains its decisions and why it might choose an alternative route. This is crucial for enhancing social acceptance,” says Eren.

Even though most people trust human drivers more, there are differences between groups and countries. Men tend to trust a computer more than women do (11 compared to 5 percent), and individuals under 50 are more open to automated driving than those over 65 (13 compared to 4 percent). Additionally, people in Finland tend to trust a human driver slightly more than others; 86 percent have this view. This is higher than in Norway (81), Denmark (80), and Sweden (78).

The car: A never-ending love story

Consider transporting yourself from place A to B. On average, what kind of means of transport do you use?



2024 has been a tough year for many, with rising prices and tighter budgets — but that hasn't stopped us from driving just as often as before. The car remains, by a wide margin, our favorite mode of transportation.

Prices are going up for food, housing, and many other essentials in life; a lot of people feel that almost everything has become significantly more expensive over the past year, and we are adjusting many of our habits accordingly.

However, our love affair with the car continues. This year's Mobility Barometer shows that we are using our cars just as often as before, despite the economic downturn. 78 percent of us use cars at least once a week, the same as in 2023.

This solidifies the car as the overwhelmingly most popular means of transport, in all Nordic countries and among all groups. Sweden and Finland top the list, with 79 percent of the population hitting the road at least once

a week, followed by Denmark (78) and Norway (76).

A long-lasting affection
This isn't a new love affair; it dates to the late 19th century. Those early cars changed how people moved, offering freedom and flexibility like never before. Cars didn't just get us from A to B — they became symbols of personal freedom and progress.

Fast forward to today, and transportation is going through major changes. Innovations are everywhere, from electric and self-driving cars to smarter public transit. Environmental concerns and the push for sustainability are driving these developments, opening new possibilities.

Why we won't let go of the car
However, the car's appeal remains strong, largely due to the unique advantages it offers, as highlighted in this report.

First, people in the Nordics find cars very convenient.

Unlike other forms of transportation, cars provide a level of flexibility that is hard to match, especially in areas where public transit is underdeveloped or unreliable. More than four out of ten consider cars easily accessible, and nearly 60 percent associate cars with comfort — a significantly higher score compared to all other means of transportation.

In addition, the evolution of automobile technology also seems to have contributed to sustaining its appeal. Today's cars are equipped with advanced features designed to enhance efficiency and reduce environmental impact. These innovations show that the automobile can continue to evolve in alignment with modern values without sacrificing its core benefits, even though much work remains to be done to reduce emissions.

Biking becomes more popular
The transportation landscape is undoubtedly shifting. Cities worldwide are increasingly investing in green infrastructure, introducing dedicated bike lanes, expanding pedestrian zones, and enhancing public transit options. Ridesharing and car-sharing services offer seemingly practical alternatives to traditional car ownership.

One effect of this development might be that cycling has become more popular over the past year, according to the survey. 40 percent now say they use a bike at least once a week, compared to 33 percent in 2023, making it the second most popular means of transportation.

The use of public transportation remained stable between 2023 and 2024, with 35 percent saying they use a bus, tram, or subway at least once a week.

In short, the Mobility Barometer highlights an interesting reality: While there are new ways to get around, people still rely on cars, even when money is tight. The mix of convenience, flexibility, and availability keeps cars relevant.

Simply put, the car is still king.

Safety is top of mind – many are open to tougher regulations

Some may argue that strict regulations and safety measures undermine the freedom of driving, but the reality is that people support enhanced road safety. The Mobility Barometer 2024 shows clear acceptance of lower speed limits, increased road surveillance, and even an age limit for when it's time to hang up the keys.

Support for tougher road safety measures remains strong, even in a region like the Nordics, widely considered one of the safest in the world. After decades of declining numbers of accidents and traffic fatalities, public sentiment shows an endorsement of more stringent regulations.

Embracing reduced speed limits
About 4 in 10 people are open to reduced speed limits across all types of roads, from highways to residential streets. Only 31 percent of respondents oppose the idea, while 27 percent neither endorse nor oppose it. This suggests an acknowledgment that speed is an important factor in the severity of accidents. While the support is evident, there are geographical differences: respondents in Sweden are the most positive (43 percent), followed by those in Finland (38), Denmark (35), and Norway (32).

The issue of tightening speed limits is also divisive. Although there is clear support for lowering speed limits, resistance remains. In Finland, 35 percent oppose it, which is nearly as many as those who support it, making it the highest negative share recorded. Many Norwegians are also skeptical to lower speed limits (34), followed by the public in Denmark (32) and Sweden (27).

Overall, men oppose such initiatives more than women do. Those living in major cities are generally more supportive, with 39 percent backing, compared to 34 percent of rural residents who endorse stricter speed limits.

Upper age driving limits
Many associate driving with freedom and flexibility, a sentiment confirmed once again in this year's Mobility Barometer. Therefore, any attempt to hinder individuals from maintaining their driving habits is a sensitive issue. However, there is clear support for enforcing stricter rules, particularly in one controversial area.

The introduction of an upper age limit for driving, often debated and polarizing, is supported by 44 percent of respondents. A smaller share, 29 percent, opposes the idea and 21 percent neither agree nor disagree. Proponents argue that age-related cognitive and physical declines can impair driving abilities, making roads safer by limiting older drivers.

Critics, however, view such limits as discriminatory, suggesting that regular health evaluations would be a more equitable approach. Despite the contention, the trend leans toward prioritizing public safety even if it requires tough compromises on individual freedoms. Here, there are clear differences between generations. While 46 percent of people under 35 agree that age limits are reasonable, only 29 percent of people over 65 believe so. Women are more generally much more positive toward this suggestion compared to men.

Increased road camera surveillance
Many drivers may not enjoy being monitored by road cameras, but a significant number want to see more of them.

Nearly every other person, 47 percent, supports increasing the number of road cameras to monitor driving speeds and serve as effective deterrents. These surveillance tools are considered indispensable in enforcing speed limits and capturing violations that might otherwise go unnoticed.

At the same time, only 2 out of 10 are against this initiative. The public's strong support for increased road surveillance highlights a clear preference for measures that enhance driver accountability and safety.

Danish respondents are the most positive, with 56 percent in favor of more cameras, followed by Swedes (49), Norwegians (43), and Finns (39). People in Finland are also the most negative toward increased surveillance, with 32 percent opposed. In Denmark, only 14 percent are against more cameras, while in Sweden and Norway, the share is 22 percent.

Towards safer roads
While the Mobility Barometer recognizes some differences in sentiment across generations and geographies, there is strong backing for ways to reduce driving speeds. Also, as high-lighted in the accompanying article, most respondents also support the implementation of alcohol interlocks. In the Nordics, despite decades of improved safety and declining accident and fatality rates, safety remains top of mind for drivers.

This focus on safety extends beyond driving habits and influences car-buying decisions as well. Apart from the price of the vehicle, safety is the top concern for most drivers.

Strong support for mandatory alcohol locks in cars

Few issues stir emotions as strongly as drunk driving. To prevent alcohol-related accidents, a clear majority in three out of four Nordic countries believes that alcohol locks should be mandatory in cars.

Drunk driving cause significant devastation and many tragedies each year. In Sweden alone, 52 people died in alcohol- or drug-related accidents in 2023, accounting for 23 percent of all traffic fatalities in the country.*

Many employers in the transport sector have voluntarily introduced alcohol locks for their drivers in an effort to keep impaired drivers off the roads. While there are some requirements for alcohol locks for convicted drunk drivers, and regulations and programs that encourage or mandate them for certain drivers, no Nordic country has a general law requiring alcohol locks in all vehicles.

Where support is strongest
However, there is clear support for introducing such a requirement, according to the Mobility Barometer. Nearly 6 in 10 respondents across the Nordics, or 57 percent, believe that alcohol locks should be mandatory in all cars. Only 20 percent oppose the idea, and roughly the same number have no opinion.

But support is not evenly distributed.

The strongest support is in Sweden, where 65 percent back the idea, followed by Norway (59 percent) and Denmark (57 percent). In Finland, however, there is no majority in favor of alcohol locks; support and opposition are almost evenly split. About one of three people in Finland, 39 percent, supports a law requiring alcohol locks, while 37 percent oppose it.

Differences between men and women
When looking at different groups, more women than men support alcohol locks, with 60 percent of women in favor compared to 53 percent of men. However, opinions are fairly consistent across age groups. There are also marginal differences between those living in cities and those in rural areas — most agree that a mandatory alcohol lock a good idea.

*"A generalized framework for analyzing car lifetime effects on stock, flow, and carbon footprint," Yuya Nakamoto, Shigemi Kagawa, Journal of Industrial Ecology 2022;26:433–447, 2021

We want to be green – and think the right way is to keep our cars as long as possible

The best way to be an environmentally friendly car owner is to keep and maintain your car for as long as possible. This is the most common opinion among the general public, according to the Mobility Barometer. Some, however, disagree and believe we should be taking more action to push for a faster transition to electric vehicles.

Frances Sprei, Professor in Sustainable Mobility at Chalmers University of Technology

> **To meet the climate targets set, phasing of fossil fuel cars ahead of schedule may be sensible.**

Acting sustainable is key for many of us, including when we use the car. As an example, there is growing support for using recycled spare parts when repairing cars, as seen in this year's edition of the Mobility Barometer.

MEKO is a driving force in the shift towards more sustainable practices, enabling a greener car fleet. While there is broad agreement on the need for this transition, experts continue to debate the pace and strategies for achieving it.

Studies point at the benefit of repairing cars

One commonly proposed strategy is to rapidly phase out petrol and diesel cars in favor of new electric vehicles, promising immediate climate benefits. However, this linear approach often neglects the breakeven period—the time it takes for the reduction in lifecycle emissions to offset the environmental costs of manufacturing electric cars.

For instance, a Japanese study suggests that extending the lifespan of both new and used cars could play a significant role in mitigating global warming. To achieve substantial reductions in lifecycle emissions, car designers should focus on increasing vehicle longevity. Consequently, some experts argue that this transition could be more effectively managed by prioritizing the maintenance and servicing of existing vehicles until they reach the end of their lifecycle.*

Clear support for service and repair among the car owners

When asking the public in the Nordic countries, service and repair appear to be seen as the greenest approach. 46 percent believe that maintaining and repairing a fossil fuel car is the most sustainable option when it comes to car ownership. This is more than double the number who think that buying a new electric car is the best choice. (20 percent).

When looking at individual countries, support for servicing and repairing is strongest in Finland (51 percent), followed by Norway (48), Sweden (47), and Denmark (38). As a result, the Danes are more inclined towards buying a new electric car as the most sustainable option, with 24 percent support compared to just 14 in Finland.

But there are also other views.

Others emphasize nudging towards electrification
Frances Sprei, Professor of Sustainable Mobility at Chalmers University of Technology in Sweden, offers a different perspective than simply keeping and servicing fossil fuel cars. She posits that if we assume the demand for mobility remains constant and consider cars, as we know them, to be the vehicle of the future, then the transition to electric vehicles seems like the obvious choice.

Frances suggests that the relative benefits of owning an electric car, both economically and environmentally, will only increase over time.

“A significant proportion of new cars in Sweden are linked with businesses or leasing contracts — this momentum is already established, and these cars invariably enter the resale market. Individuals in the habit of changing cars every three years, opting for an electric would indeed be more beneficial,” Frances Sprei says.

Elaborating on the eventual transition, Frances asserts: “The complete overhaul of the car fleet is an unavoidably time-consuming process. If we passively wait, the transition may take a long time.”

She says that with each new electric car addition to the fleet, the pace of this transition accelerates and gains momentum. Also, the future benefits will only increase as the energy grid is better optimized, energy sources become more sustainable, and the conventional alternative becomes more expensive.

“The escalating costs associated with fossil fuel emission rights will advance the economic inviability of conventional cars. To meet the climate targets set, phasing of fossil fuel cars ahead of schedule may be sensible,” she says.

What to consider when making your choice
So, the key question is: Should you invest in a new electric car, even if your petrol or diesel car is still running well?

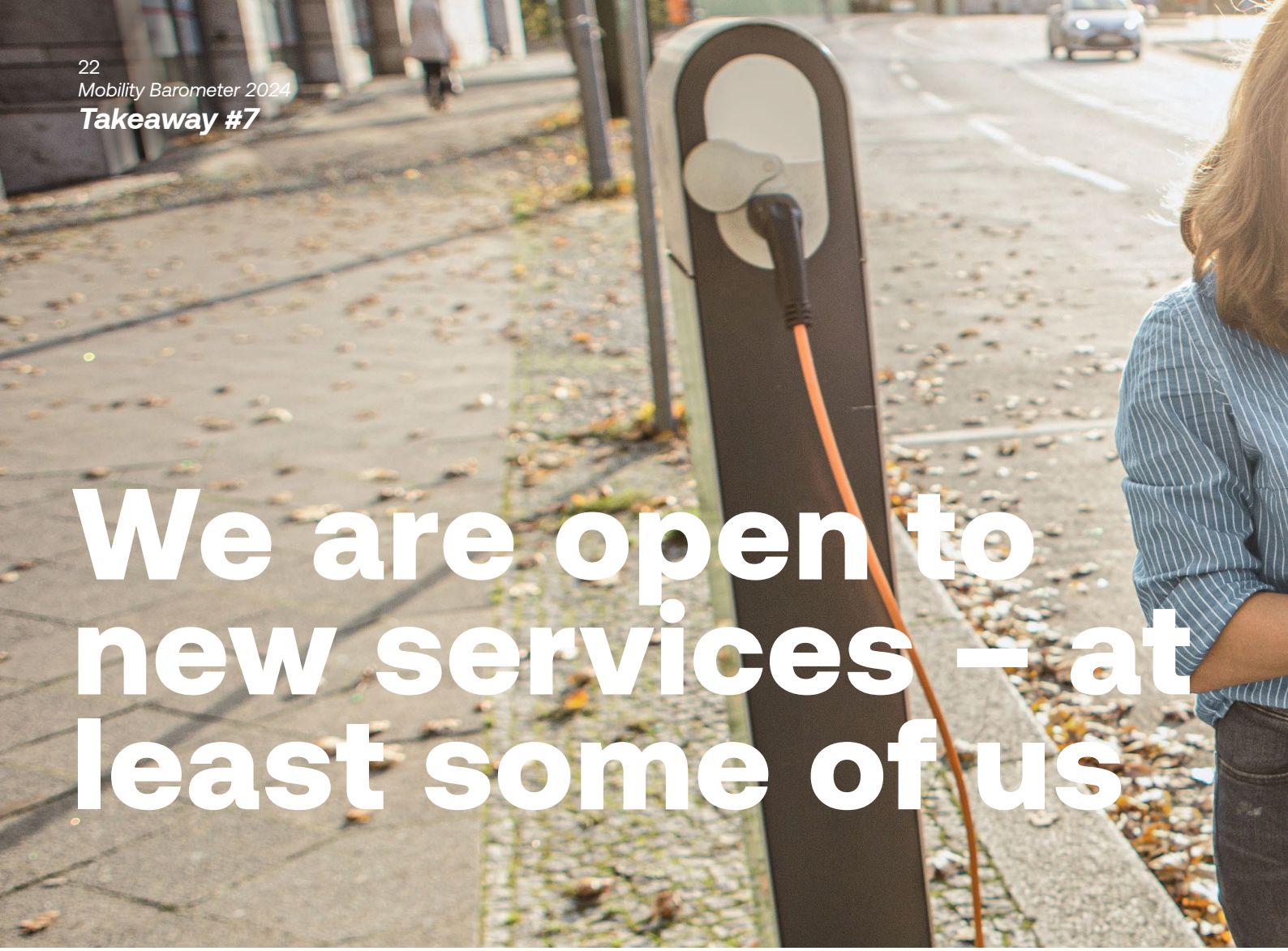
That depends on your perspective and what happens to the surrounding environment and infrastructure. Illustrating Sweden's progress, Frances Sprei claims: "The roll-out of electric cars must be accompanied by the right conditions. High electricity prices can distort the perceived value of owning one and the initial investment can discourage potential buyers. But considering the overall lifecycle, many would save money by choosing one.”

The power of the consumers
Not surprisingly, the Mobility Barometer shows that support for buying an electric car as an environmentally friendly choice is stronger in larger cities than in rural areas.

As we move toward a more sustainable future, the debate continues: Should we push for rapid electrification or focus on maintaining the existing fleet?

Many advocate for a balanced approach, weighing environmental impact, consumer preferences, and market forces. While experts offer valuable insights, it's ultimately consumer choices that will determine the speed and smoothness of this transition.

*”A generalized framework for analyzing car lifetime effects on stock, flow, and carbon footprint,” Yuya Nakamoto, Shigemi Kagawa, Journal of Industrial Ecology 2022;26:433–447, 2021



We are open to new services – at least some of us

The automotive industry is undergoing a transformation, with a wave of new car brands, innovations, and business models. But are we willing to embrace these changes? Some groups are clearly more interested than others.

The industry is moving swiftly to meet changing consumer demands and the push for sustainability. With new technologies, services, and brands, vehicle performance and the driving experience are being transformed. As both established manufacturers and startups introduce next-generation features, the transportation landscape is evolving rapidly.

We care more about where the car comes from

For instance, many new car brands have emerged over the past decade, challenging the traditional automotive landscape. These new players are diversifying vehicle types and introducing models from countries not typically associated with car manufacturing. This influx is driving innovation and expanding the industry's global reach beyond the usual hubs.

As this development continues, people in the Nordics seem to care increasingly about the origin of their cars. According to the Mobility Barometer 2024, 30 percent now say that the origin of their car is important, compared to 25 percent in 2023 when the same question was asked.

Men are more likely to consider this important (37 percent) compared to women (23), and city dwellers place higher importance on it than those in rural areas. Among the Nordics, people in Finland care the most about this issue (36), followed by Norwegians (29), Danes (28), and Swedes (27).

Clear resistance to subscription models

The digitalization and electrification of cars have led manufacturers to offer subscription models and various add-on features. You can see this as something positive — or take a more skeptical view.

The truth is, relatively few people like these subscription models. Only 13 percent of the public is overall positive about these options. However, interesting differences emerge across age groups. Those under 35 are clearly the most positive, with 24 percent supporting these models, followed by individuals between 35 and 49, where 14 percent like the idea of subscriptions. Support drops significantly to 7 percent among those between 50 and 64, and only 4 percent among those over 65.

Slowly growing interest in car-sharing services?

Another common phenomenon in recent years is the rise of various car-sharing services, especially in cities and more densely populated areas. However, the idea of sharing a car with others hasn't caught on widely with the public.

More than half of those surveyed this year, 51 percent, cannot see themselves sharing their car with others, the same proportion as in 2023. Those who find it hardest to envision sharing their car live in Finland and Denmark (53 percent), followed by individuals in Sweden and Norway (49). Those most open to sharing are in Norway and Sweden, with 22 and 21 percent respectively, followed by Denmark (21) and Finland (19).

But does this mean things will remain unchanged?

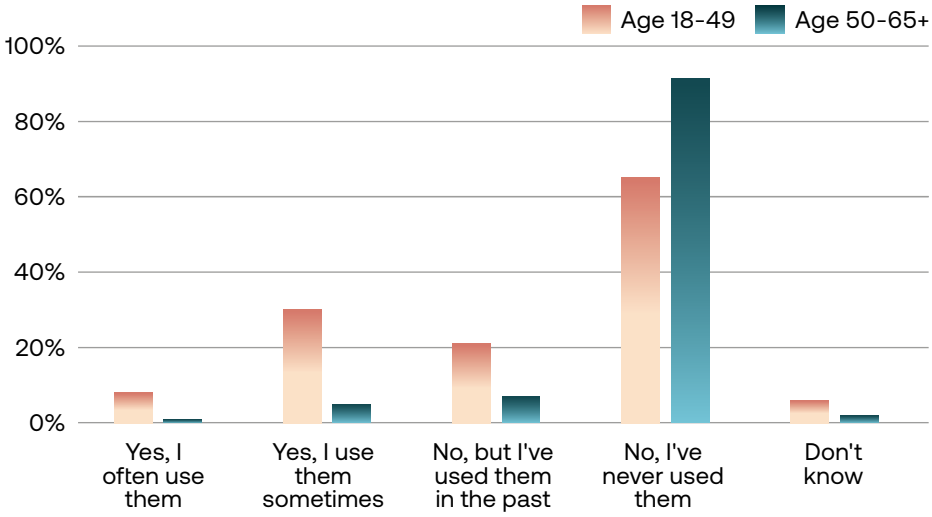
30%
believe the origin of their car is important, compared to 25 percent in 2023.

Not necessarily. There might be a slow increase in interest in car-sharing, as the number of people who can see themselves sharing their car with others has risen from 19 percent to 21 percent in one year. In cities, where most car-sharing services are located, resistance to the idea of sharing a car is significantly lower (45 percent) than in rural areas (59). At the same time, slightly more people report having used car-sharing services; 12 percent this year, compared to 10 in 2023. Additionally, slightly fewer people, 84 percent, say they have never used such a service. In last year's Mobility Barometer, this figure was 87 percent.

Professor: Key groups live in cities
Frances Sprei, Professor in Sustainable Mobility at Chalmers University of Technology, explains that the general trend is expected, as city residents with access to public transportation are prime candidates for shared mobility. They often use it for occasional trips rather than daily commutes. According to her, the success of car-sharing services heavily depends on dense urban settings:

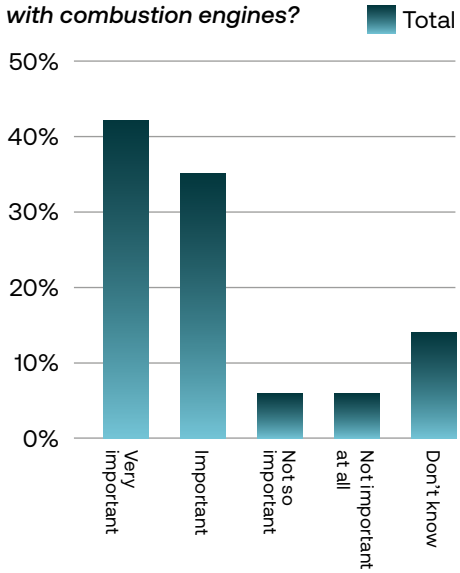
"Users often report a greater sense of community and reduced stress levels. They appreciate not just the financial savings but also the peace of mind that comes with not worrying about maintenance and parking," says Frances Sprei.

Younger are more willing to share
Have you ever used any car-sharing services?



Right to Repair: Avoiding pitfalls when going electric

How important is it to you that electric cars can be repaired and serviced equally as easy as cars with combustion engines?



Magnus Sikström, Head of MEKO's subsidiary ProMeister Sweden

Going electric can be an attractive option when it is time to buy or lease a new car. There are pitfalls that one can easily fall into, however, where the owner might face significant problems just after a few years. Magnus Sikström, expert on electric vehicles within MEKO, knows how to avoid them.

For many electric vehicles, there is no way to repair or assess even slightly damaged battery packs after accidents, reports Reuters. It has forced insurance companies to write off cars with few miles – leading to higher premiums, undercutting gains from going electric and articulating an expensive gap in what was supposed to be a circular economy.

Tesla's approach to integrating battery packs into the car body lowers production costs but pushes potential expenditures back onto customers and insurers. The risk of an electric car turning into a valueless asset within five to eight years and the electric transition losing momentum have intensified the urgency of assuring serviceability and repairability of these vehicles.

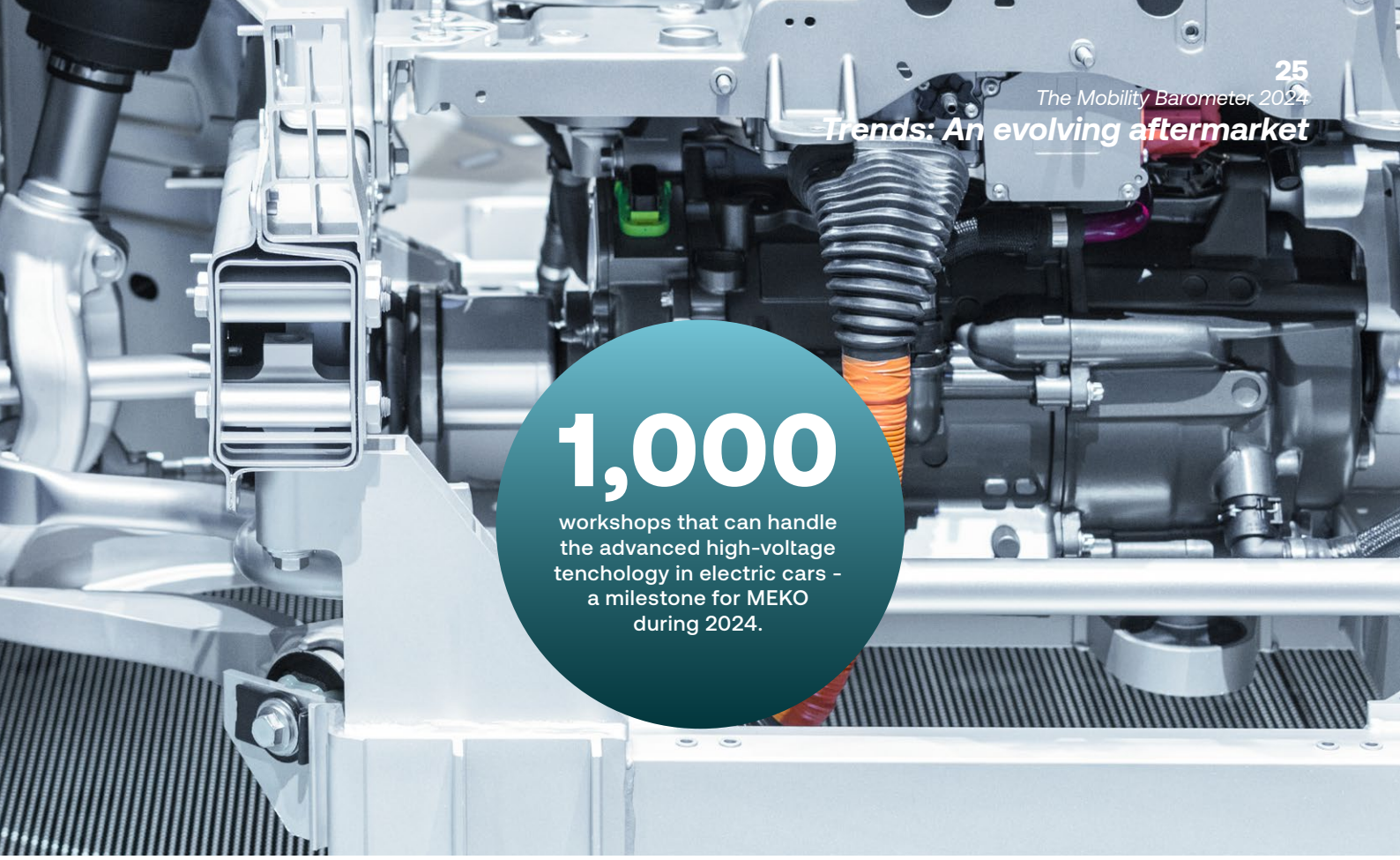
Shift gained momentum with Tesla
Since joining MEKO in 2007, Magnus Sikström has witnessed the industry's vigorous shift towards electrification. The initial uptick, driven by hardcore enthusiasts in the 1990s, gained momentum with Tesla's influence and was further accelerated by the recent influx of new manufacturers—indicating that this is far from a passing fad.

Having seen the first electric vehicles come to market inte the late 1990s, which drew the interest of a few enthusiasts, the rise of Tesla in the past decade made electric mainstream, he says. With the emergence of hundreds of new manufacturers in recent years, it certainly seems electric cars are here to stay.

What car owners should consider
However, the shift brings new demands for vehicle technicians, requiring retraining to prevent costly and potentially fatal mistakes. MEKO, through its subsidiary ProMeister, has responded with a range of training programs focused on competency and safety. Given that the battery is the heart and soul of an electric car, ProMeister also trains technicians on how to safely swap batteries.

"This is key to ensure they have the right skills and knowledge so they can have informed conversations with car owners. These required skills are different but not necessarily harder," says.

Another key aspect for customers to consider, Magnus says, is ensuring the battery is serviceable. If not, this



could lead to high costs and minimal sustainability returns over the car's lifecycle.

Look for serviceable batteries
Although he has not faced many issues himself, Magnus acknowledges reports of cars from well-known manufacturers with batteries that are glued together and thus not serviceable.
"The fact that this is even a topic of debate is surprising and problematic," Magnus explains. "The industry, which portrays itself as a champion of sustainability, really shoots itself in the foot if this isn't addressed soon. However, I believe this issue is still relatively rare."

Right now, the jury is still out in many countries. Most electric car owners have had their vehicles for only a few years. As a result, few have reached the point where their battery needs to be replaced, or have been forced to buy a new car after just 5-8 years.

Learnings from Norway
In Norway, where electric cars have been around longer, there are valuable lessons to be learned. One key takeaway is that an effective market exists where independent repair shops offer battery repairs. In other words, it's possible to avoid replacing the entire battery—saving significant costs and allowing drivers to keep their vehicles on the road. This ability to repair batteries also helps maintain the car's resale value.

The need for industry-wide customer protection
Magnus Sikström advises prospective owners to be cautious when choosing brands, especially newer ones, due to the risk of losing aftermarket support if the company goes bankrupt.

Highlighting the need to protect customers, Magnus Sikström supports the EU's Right to Repair Act. This legislation aims to make it easier and more affordable for consumers to repair electronic devices by ensuring spare parts, repair manuals, and software updates are available to independent repairers and consumers for a set period after purchase. The goal is to reduce electronic waste, promote sustainability, and extend product lifespans.

Sikström believes that including the aftermarket under such directives would strengthen the industry's credibility and further promote sustainability.

The critical importance of the right competence
Electric cars seemingly represent the future of eco-friendly transportation, but their long-term sustainability depends on the auto aftermarket industry's ability to provide affordable servicing and repair options. MEKO is working to ensure that going electric is both a smart and sustainable choice by improving technician skills and strengthening consumer protections. In 2024, MEKO reached a significant milestone, with over 1,000 workshops now equipped to handle the advanced high-voltage technology in electric cars.

Norway's experience shows that it's still possible for drivers to get their cars repaired without breaking the bank. However, it's important to carefully consider your choice of car.

> **"The industry, which portrays itself as a champion of sustainability, really shoots itself in the foot if this isn't addressed soon.**

People expect electric cars to be just as easy to repair as gas cars

A large majority of people in the Nordic countries agree that it must be easy to repair and maintain electric cars. This sentiment is especially strong among Swedes.

For decades, taking care of and repairing one's car has been as common as maintaining a home — a routine part of daily life. Some drivers prefer taking their cars to branded dealerships tied to specific brands, while others choose independent workshops that can handle all makes and models, such as the Mekonomen chain in Sweden or Fixus in Finland.

A system that has worked well for years
EU regulations ensure that new car warranties remain valid, regardless of whether the repair work is done at a branded or an independent workshop.

This system has worked well for a long time. But as noted in the accompanying text, there are signs that it may be difficult — or sometimes impossible — to repair critical components in new electric cars, particularly batteries, which in practice serve the same function as the engine in a gas or diesel car.

The idea that electric cars should be harder to repair than traditional gas or diesel cars is widely rejected by the public in the Nordic region. A full 76 percent say it is important or very important that electric cars can be repaired and serviced as easily as cars with combustion engines. Only one in ten consider this less important, and 14 percent don't know.

Swedish men are mostfirm in their opinion
In Sweden, opinions are the strongest. Here, 79 percent believe it is important that their new electric car can be repaired and serviced just as easily as their previous car, followed by Finland (77), Denmark (75), and Norway (72).

Another clear pattern also emerges: More men than women say that easy repair and service are important, especially in Sweden, where 84 percent of men hold this view. Finland is the only country where both men and women rate this issue equally important, with 77 percent in agreement.

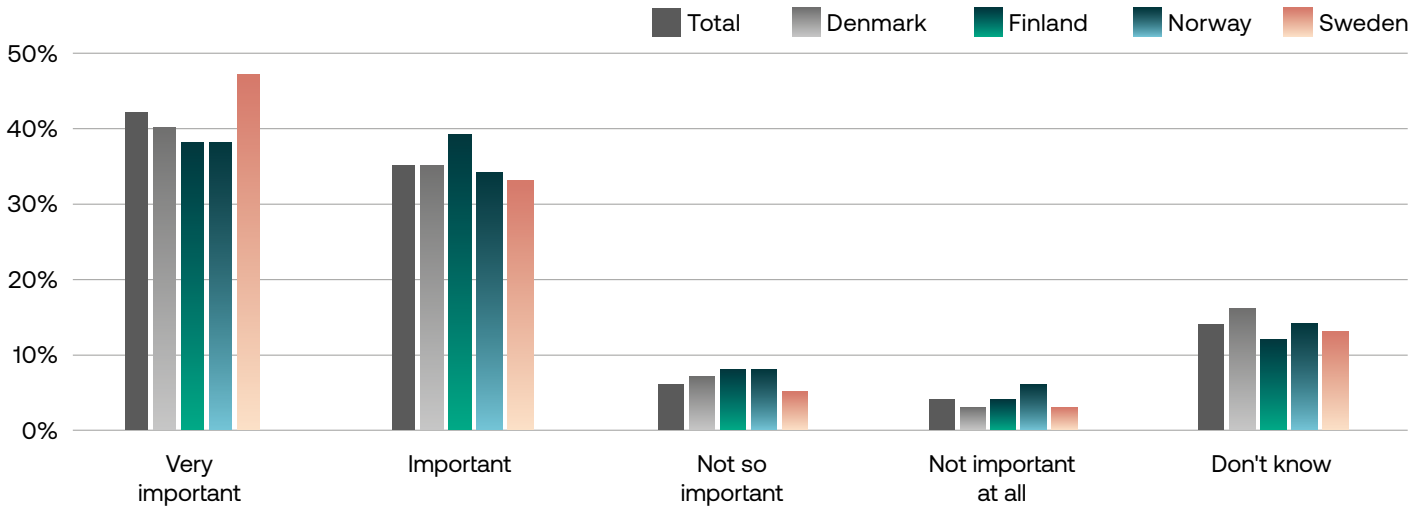
Experience with electric car service and repair
But do electric cars even need as much repair and maintenance? This question has sometimes been raised in the debate.

There's no doubt that the service and repair needs of an electric car differ somewhat from those of a gas or diesel car, but over the lifespan of the vehicle, experiences so far suggest that the cost of servicing and repairing an electric car is roughly the same as that of a fossil-fueled car.

An electric car has fewer components that need replacement, but on the other hand, they are more complex and often require more extensive work in the workshop. Beyond maintaining and repairing the battery, tires wear out more quickly on electric cars due to faster acceleration, and brake discs generally show more wear compared to those on gas and diesel cars.

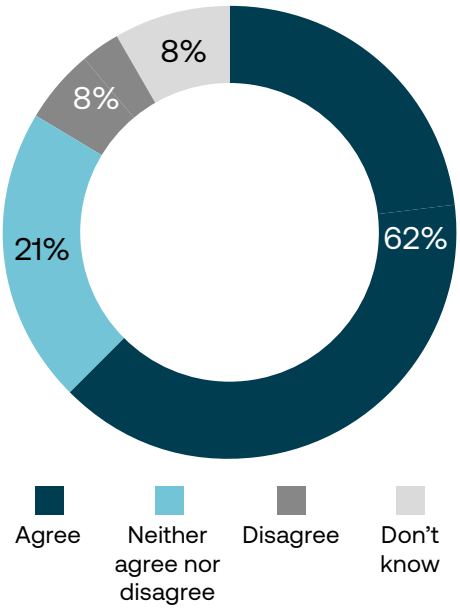
So, there is a clear need for electric car maintenance, and people in the Nordics clearly expect it to be accessible. Ensuring that this demand is met will be crucial as we continue to transition to a more sustainable mobility.

How important is it to you that electric cars can be repaired and serviced equally as easy as cars with combustion engines?



A preview: Mobility in the next decade

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



What can we say about the next ten years for mobility? Recent studies reveal at least one key insight, and it's about time. And according to people in the Nordic countries, it's also about cars. Confidence in the future of cars is at its highest since the Mobility Barometer was launched.

Electrification of cars, connectivity, and the development of fully autonomous vehicles were set to upend the automotive industry, it was said. Looking back, the transportation demands and behaviours of today look very similar to previous generations. Do we dare to make more predictions?

To begin with, bold predictions are not new. Around the turn of the 19th century, the imagined vision of the future of transportation was utopian. The 20th-century man imagined a future where speed and technology had made immense advancements. The film "Back to the Future" (1985) even dismissed the need for roads altogether, with Doc Emmett Brown's famous line "Where we're going, we don't need roads" becoming an instant classic.

While being a family sci-fi film, the film was of its time. Innovative concepts such as hovercrafts, personal jetpacks, and even Maglev trains were developed by the private sector.

What history and recent studies show us

However, it seems people's perception and need for mobility have not changed much in the modern era. Even with the push towards innovation, the same core issues and preferences continue to dominate, Tesla-founder Elon Musk concludes. This is also confirmed in the report you are reading right now. The long-lasting love story with cars is reaffirmed, connected to the timeless values they bring, such as flexibility and comfort.

This notion suggesting that the underlying dynamics have remained largely unchanged is reinforced by several reports from recent times. While

some trends and emerging technologies are undeniable, some underlying forces and dynamics have "kept the essential characteristics" the same up to this day, according to the consulting firm McKinsey (2021). In a report from 2021, the advisory firm BCG concludes that "consumer inertia and slow regulatory movements" have been constants throughout time.

Trends that have gone cold – and one that is still hot
However, there are undoubtedly smaller and transformative things happening beneath the surface. A decade ago, there were three major trends:

1. Connectivity
2. Self-driving cars
3. Electrification

Only electrification has kept up the pace, according to Oskar Gibas Hjertquist, Head of International Sales at MEKO. He notes that many politicians and businesses linked to the industry are keen to talk about electrification. Climate change, the Paris agreement, and consumers' wish to play their part in the transformation obviously add to this.

"Predicting the pace of electrification is difficult, mostly due to dependency on politics and policy" says Oskar Gibas Hjertquist.

"Trade wars, the introduction of tolls on electric vehicles are two things that come to mind. What would moving the power center from the US and Europe to China mean for production? Will we see cars with other features? Maybe."

One important clue about the future of mobility
However, there are more clues that shed light on the future, apart from underlying preferences that seem to be preserved over time. The mobility organization SAE International (2020) concluded that today's technology and digitalization experience barriers – regulatory, technological, and societal acceptance. These obstacles are "reminiscent of those faced by any transformative technology in history," which would mean a slow transformation.

Speaking about consumers' concerns of today relating to electric cars, however, Oskar Gibas Hjertquist is not as worried.

"Battery technology will continue to improve," he says.

"Future generations of batteries will be more reliable, more sustainable, and cheaper. We have seen issues with early generation batteries and some predict that batteries will always stop working after ten years, but that's not my perception. Batteries may even outlast the vehicles and carry value in the aftermarket in the future."

New mobility technology is hindered by humans – and regulations
What about connectivity and autonomous driving – two trends that were burning hot a few years ago? Consensus seems to be that the most significant changes will encompass new AI innovations, but that the driver seat will continue to be occupied by humans.

Dr. Sven Beiker, an automotive expert and lecturer at Stanford University, reflects that the promise of autonomous vehicles has been a "decade-long dream, yet practical deployment reflects the complex nature of societal and regulatory acceptance." A report from the global market research company Technavio (2024) adds to this, stating that the fundamentals of automotive consumer behaviour are taking longer than expected to shift. This report also confirms that 80 percent of people trust a human driver more than a computer.

So, what does the future hold?
"While tech can be transformative, it is in the end consumers' preferences that shape the direction," says Oskar Gibas Hjertquist.

"I don't see this happening in the coming decade without outside help. There would have to be a regulative catalyst to revive those technologies, with implementation in some confined areas. Looking at the predominantly rural areas in the Nordics, my bold prediction is that things will be very much the same in ten years."

One thing is clear, at least according to the majority of the people in Sweden, Norway, Denmark, and Finland: cars are here to stay. 62 percent believe cars will play a significant role in the future, up from 59 percent last year—marking the highest level of support since the Mobility Barometer launched in 2022. Only 8 percent think cars won't play a major role, down from 10 percent in 2023. This is the lowest level recorded.

Oskar Gibas Hjertquist, Head of International Sales at MEKO

Wind of change: Opinions shaping a greener mobility

There is no doubt our transport systems need to be more environmentally friendly, and political changes are underway in many countries and at the EU level. However, the path forward is also sparking political discussion. The Mobility Barometer shows that some of the key issues in this debate are reflected in public opinion.

The automotive industry in Europe is at an important point, navigating a mix of technological advancements and environmental policies aimed at reducing carbon emissions.

Important changes are happening at the EU level. The European Commission has set a target to ban the sale of new cars with internal combustion engines by 2035. Central to the EU's environmental strategy is the electrification of its transport sector, and this proposal is part of the broader European Green Deal, which aspires to make Europe the first carbon-neutral continent by 2050.

Many of the leading automobile manufacturers align with this vision, having announced massive investments in electric vehicle technology and infrastructure. Moreover, initiatives such as the European Battery Alliance are working to build a competitive and sustainable battery manufacturing ecosystem within Europe.

One of the key components of this transition is creating a comprehensive charging infrastructure. The EU acknowledges that the widespread adoption of electric cars depends on the availability of convenient and reliable charging stations. To this end, the so-called Alternative Fuels Infrastructure Directive mandates that member states develop and implement plans to increase the number of charging points. By 2025, the EU aims to have one million public charging points.

Striking disagreements among interest groups

This EU agenda and some of the proposed legislation, however, have proven polarizing in the political landscape. With the new setup of representatives following the summer 2024 elections, some experts believe that the European Parliament may have a harder time passing ambitious climate policies in the coming term. Nonetheless, the tone has already shifted.

For instance, in July 2024, the European People's Party, the largest group in the European Parliament, presented a draft document that appeared to support weakening the bloc's plan to phase out internal combustion engine vehicles. In response, battery manufacturers and electricity companies wrote to EU lawmakers, urging them to maintain the ban on selling new cars running on fossil fuels after 2035. They emphasized the need to focus efforts on making the EU industry more competitive instead.

Outlook: New regulations

Division in public opinion
These differences in opinion among policymakers are also reflected in public sentiment, according to the Mobility Barometer.

Almost every second person in the Nordic countries, 49 percent, disagrees with an idea of banning the sale of new diesel and gasoline cars by 2035. Only 21 percent believe it is a sensible thought. Men are generally more supportive (25 percent) of a ban than women (17 percent). Interestingly, location also plays a significant role. About 41 percent of people in major cities oppose a ban, compared to 62 percent of those residing in smaller rural areas.

Finland hosts the most negative views, with 59 percent opposing the idea of a ban. Following Finland are Norway (51), Sweden (45), and Denmark (43). Notably, only 12 percent of people in Finland support the idea of banning the sale of new fossil fuel cars starting in 2035.

What we think about fossil fuel bans in city centers
Another emerging trend within many countries is the restriction of certain vehicles in urban areas. A few years ago, the UK introduced so-called clean air zones, aimed at reducing pollution by imposing fees on drivers entering designated regions. Cities like Oslo, Madrid, Paris, Athens, Berlin, and Copenhagen have implemented or are planning to implement restrictions for cars in cities to reduce emissions. In 2023, Stockholm unveiled plans to prohibit petrol and diesel cars from parts of its core.

However, the public is unconvinced. 19 percent agree that fossil fuel cars should be banned from city centers, while 50 percent oppose this idea. Younger people, particularly those aged under 35, are more supportive, with 25 percent agreeing with a ban, compared to only 16 percent of those aged 65 and older. Similarly, urban residents are more supportive of a ban compared to their rural counterparts.

Differences between countries
Interestingly, there are some differences in sentiment between the Nordic countries. About 60 percent of people in Finland disagree with the concept of a ban in city centers, followed by Norwegians (50 percent), Danes (49), and Swedes (46). Sweden has the highest share of supporters, with 21 percent in favor of a ban.

The debate will continue, and opinions will clash, but at its core, few question the need to reduce emissions from transportations. The path to achieving this goal will be shaped by political decisions, technological advancements, companies' adaptability, economic conditions – and public behavior.

This is MEKO

The need for mobility is timeless. There is always a demand for going from one place to another with vehicles that are functional and safe. At MEKO, we meet this constant demand with a solid and proven business model. Every day, we strive to be the most complete partner for all who drive, repair, and service cars. We aim to be the car owner's first choice regardless of vehicle model or fuel type.

MEKO is an international corporate group that operates in the automotive aftermarket. We are a market leader in Northern Europe with presence in Denmark, Estonia, Finland, Latvia, Lithuania, Norway, Sweden, and Poland within wholesale of spare parts and through several well-known brands and workshop concepts.

Through theese brands, we meet the needs of various customer groups simultaneously. This is an important part of our solid business model, where we benefit from strong customer loyalty that has been built up locally over a long period of time. Combined with our established branch and workshop concepts, we conduct our wholesale operations with an extensive logistics network. We also export to Germany and the Czech Republic, among other countries.

Caring for and repairing as a business concept
Cars and other vehicles have a natural place today and tomorrow, even if driving habits change and technology becomes greener. By investing in future mobility, we want to develop our business and drive a transition in our industry toward increased sustainability. The backbone of our business is the same: to care for and repair instead of buying new. In many cases, it is better for the environment to repair and service your car than to buy a new one, even if it is electric.

Long history – aiming to continue for years
The basic idea of caring and repairing has been the same since we were founded in Sweden in 1973. For many years, a significant part of our business was conducted under the name Mekonomen, which still is one of the most well-known brands in Scandinavia. Since then, we have grown significantly both organically and through acquisitions. That is also one of the reasons we changed our name to MEKO in 2022, reflecting our history and broader presence with geographically diverse revenue streams across our eight markets.

Now, we are building an even stronger MEKO. We focus on growth, creating synergies, and driving digital development. Our employees and customized full-service offerings are the greatest assets we have in our future journey. It will continue for years to come.

A market worth more than 220 billion euros

The automotive aftermarket provides spare parts, services, and repairs for vehicles. The market is substantial—in Europe alone, it is estimated to be worth approximately 220 billion euros in 2024.

The so-called independent automotive aftermarket is a segment of the total aftermarket where independent companies repair, maintain, and service cars outside the vehicle manufacturers' own networks. In Europe, there are about 30,000 companies in this independent sector, collectively creating 350,000 jobs.

According to the industry organization Figefa, vehicle manufacturers produce only about 20 percent of the components themselves for repair purposes. The rest of the replacement parts are produced by original equipment suppliers and independent parts producers who supply exclusively to the independent aftermarket.

Independent parts wholesalers provide efficient delivery of replacement parts throughout supply networks in Europe. It is crucial for distributors to be as accessible as possible to workshops and car owners. Accessibility means fast deliveries of the right spare parts at the right time and at the right price, allowing workshops to perform their jobs without unnecessary waiting times for customers.

MEKO operates throughout this value chain: from purchasing spare parts to distribution and running their own workshop concepts, which help customers quickly and efficiently.

In summary, the independent aftermarket plays a crucial role in maintaining and extending the lifespan of cars by offering affordable and easily accessible solutions for both private individuals and businesses.

Geographical overview

A strong geographical presence

	Denmark	Sweden	Norway	Poland	Finland	Estonia	Latvia	Lithuania
	4,267	4,103	3,408	2,809	1,462	467	155	91
Net sales SEK M	48	190	129	89	172	33	6	7
Number of affiliated workshops	1,003	932	1,062	1,072	323	34	0	0
Wholesaler brands	FTZ	MECA, Mekonomen	MECA, Mekonomen, Sørensen og Balchen	Inter Team	Koivunen, Mekonomen	Balti Autoosad	Balti Autoosad	Balti Autoosad
Workshop concepts	AutoMester, HELLA ServicePartner, Din Bilpartner, CarPeople	MECA, Mekonomen, MekoPartner, Speedy	MECA, Mekonomen, MekoPartner, BilXtra	O.K. Serwis, Inter Data Service	Fixus, Mekonomen	Fixus	Fixus	Fixus

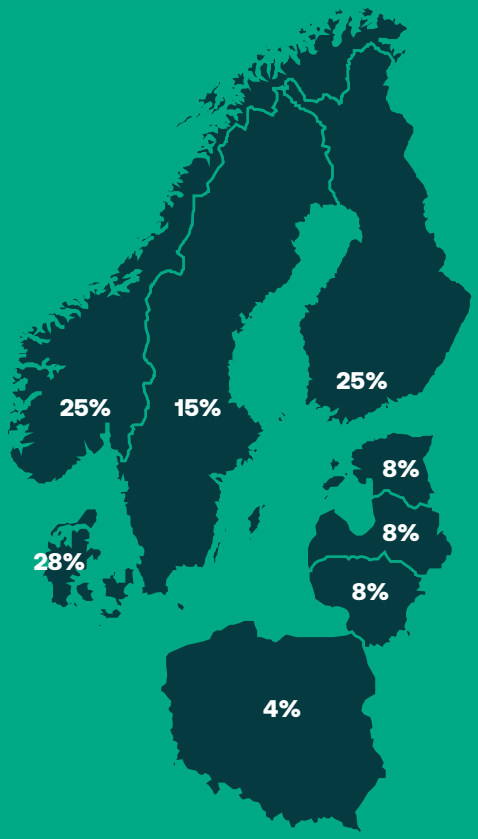
MEKO in brief

Business:
An international corporate group and market leader in Northern Europe that operates in the automotive aftermarket.

President and CEO:
Pehr Oscarson

Vision:
We enable mobility – today, tomorrow and in the future.

The share:
MEKO has been listed on the Nasdaq OMX Nordic Exchange in Stockholm since May 29, 2000.



Revenue 2023:
16,762 SEK M

Affiliated workshops:
4 428

Number of branches:
662

Average number of employees:
6 339

In-depth data study

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

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

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

42. **Which of the following determines what you use as a mean of transportation?**

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

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

48. **Can you consider renting, leasing or owning an electric car?**

49. **Can you consider renting, leasing or owning a plug-in hybrid car?**

50. **Can you consider renting, leasing or owning a fossil fuel car?**

51. **Can you consider renting, leasing or owning a diesel car?**

52. **Can you consider renting, leasing or owning a hydrogen car?**

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

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

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

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

62. **The brand of the car matters a lot to me.**

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

66. **I can see myself sharing my car with other people.**

68. **Sale of new diesel and gasoline cars should be banned by 2035.**

70. **Cars that run on diesel or gasoline should not be allowed in city centers.**

72. **Electric cars are only for rich people.**

74. **The green revolution will not happen without a shift to electric cars.**

76. **A shift in technology is currently happening where AI is slowly taking over functions that was earlier handled by the driver. What is your attitude towards this shift?**

78. **Who do you trust the most to drive a car?**

80. **What is your attitude towards car workshops reusing recycled spare parts with the same quality as new ones, during service and repair?**

82. **How important is it to you that you can repair and service your car to increase its maximum life span?**

84. **How important is it to you that electric cars can be repaired and serviced equally as easy as cars with combustion engines?**

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

88. **Breathalyzers for alcohol should be mandatory in all cars.**

90. **There should be more traffic cameras out on the roads.**

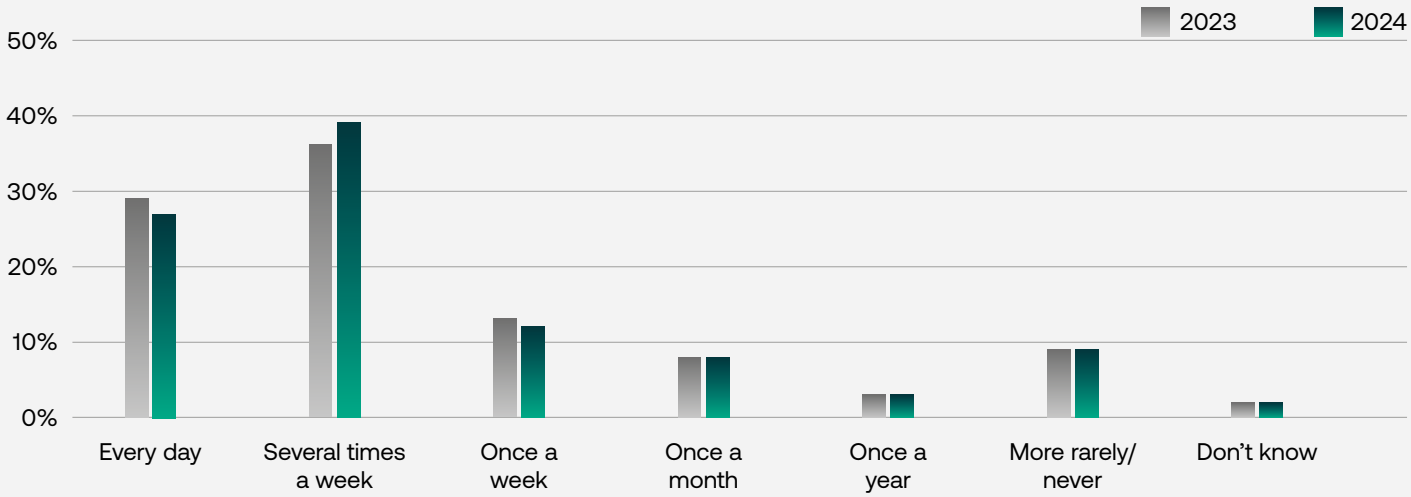
92. **There should be an upper age limit for how long you are allowed to drive a car.**

94. **It's a good thing to lower the speed limits on roads.**

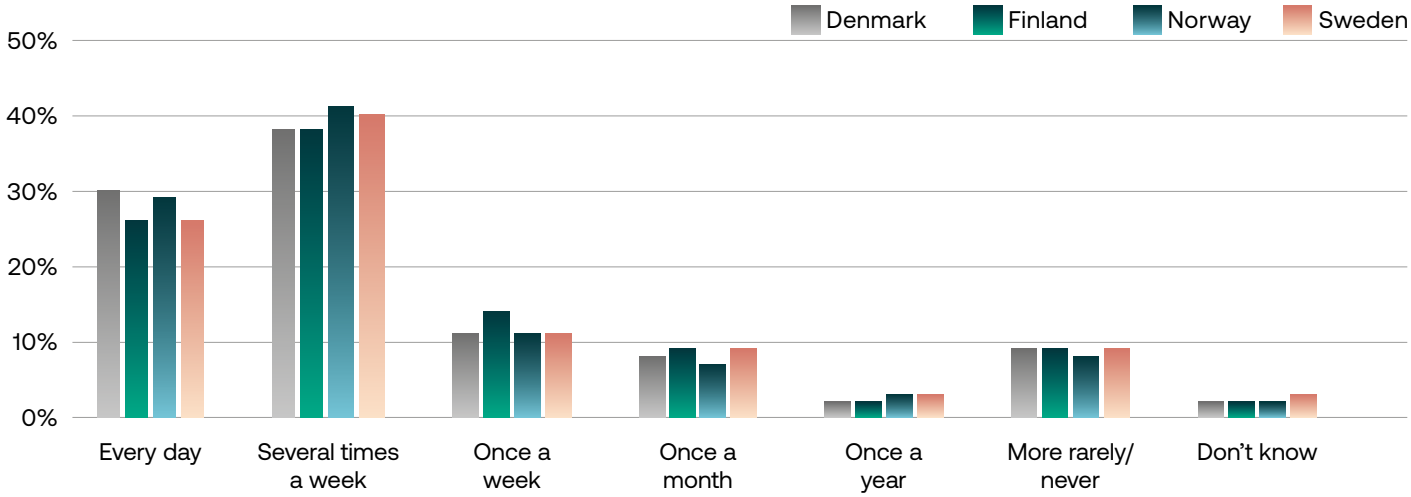
96. **Have you ever used any car-sharing services?**

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

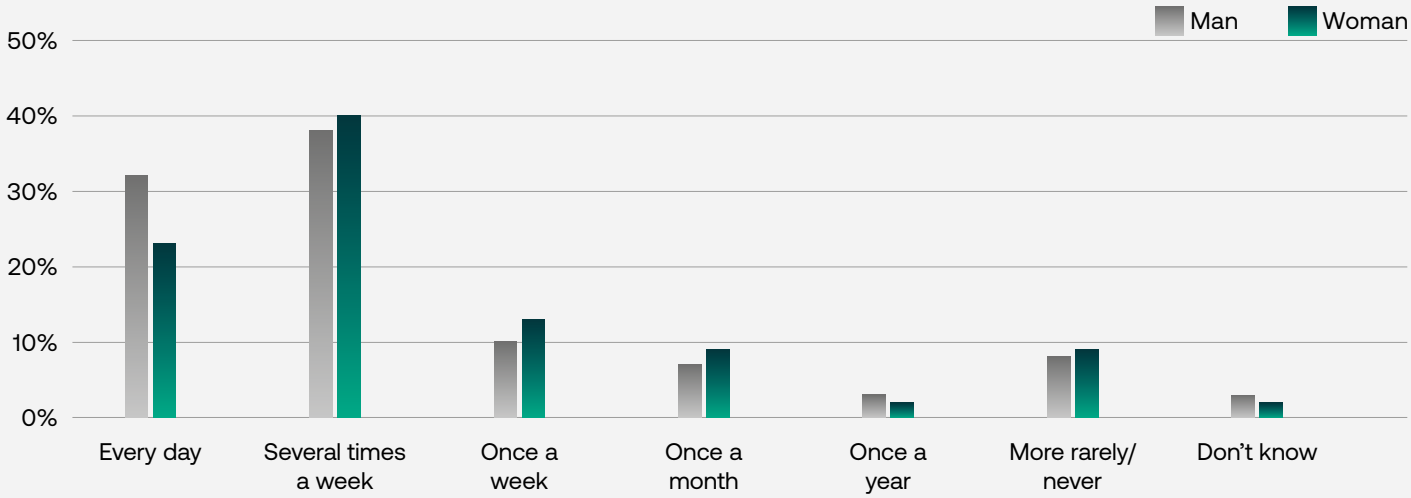
Total



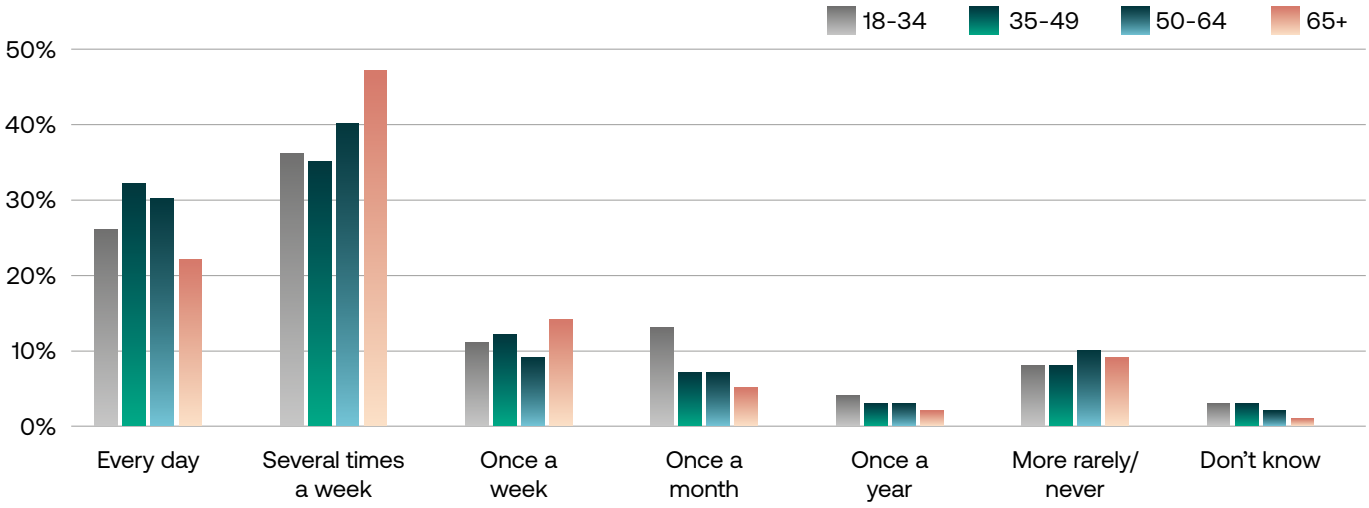
Countries



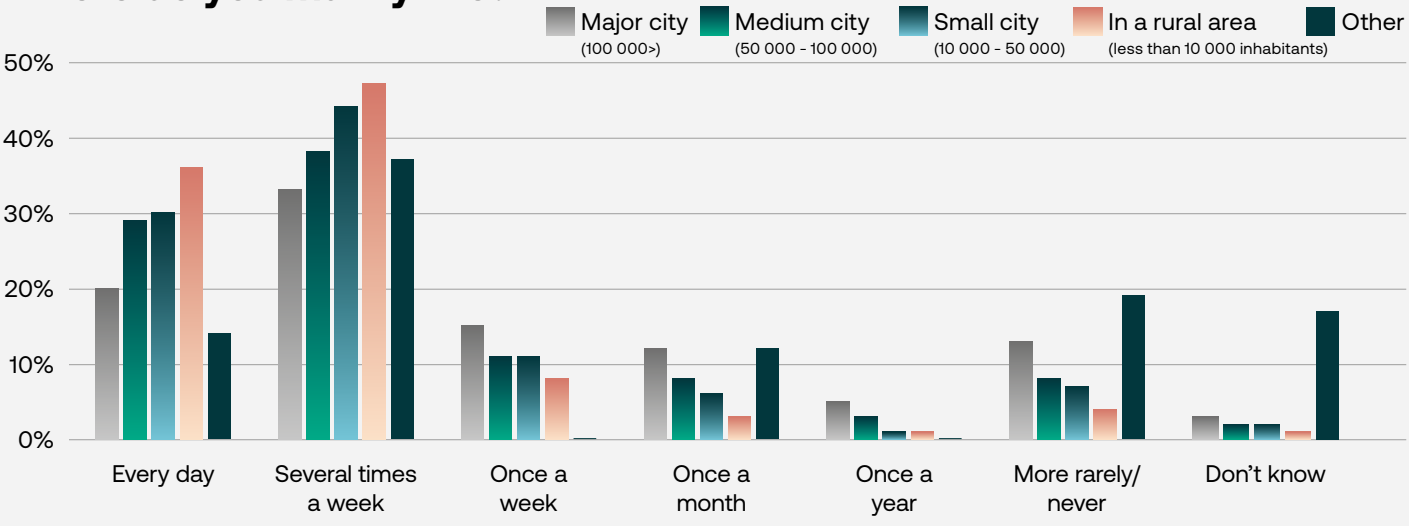
Gender



Age

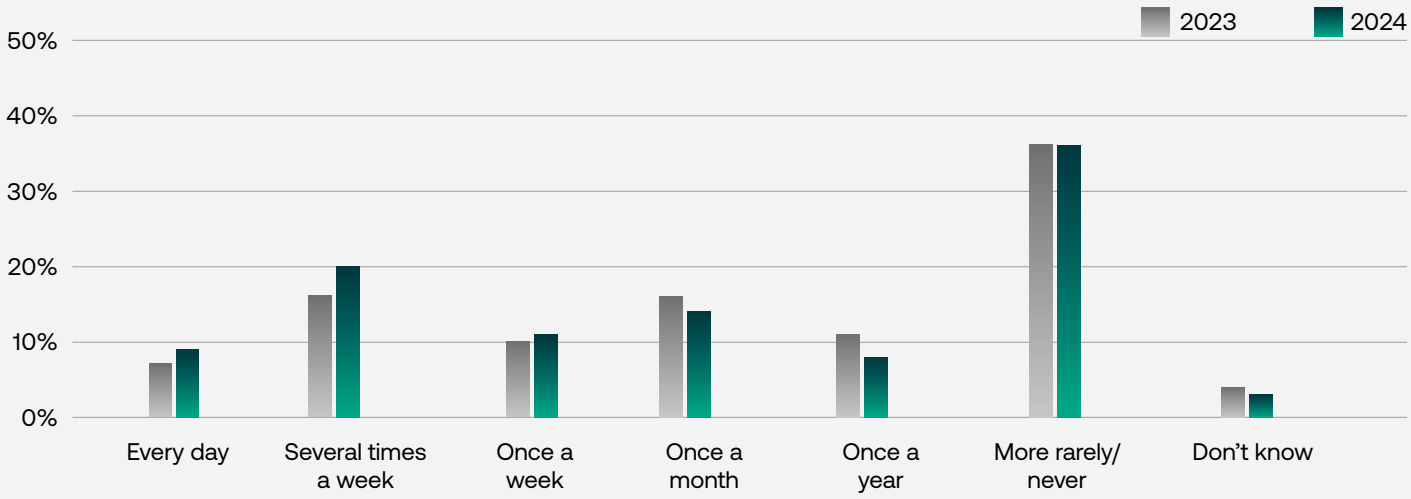


Where do you mainly live?



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

Total



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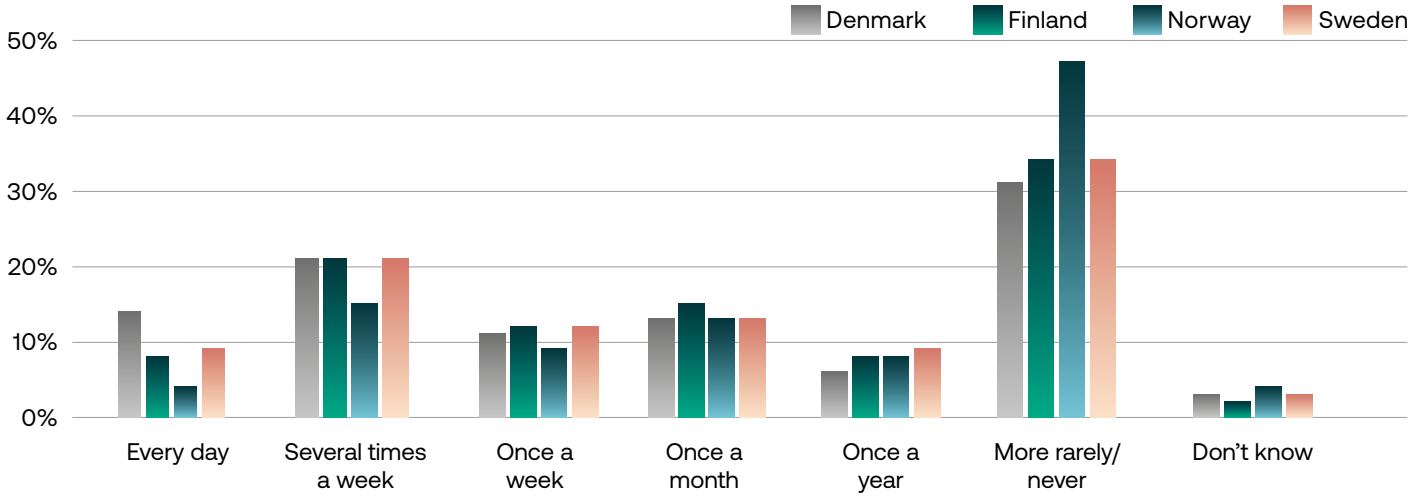
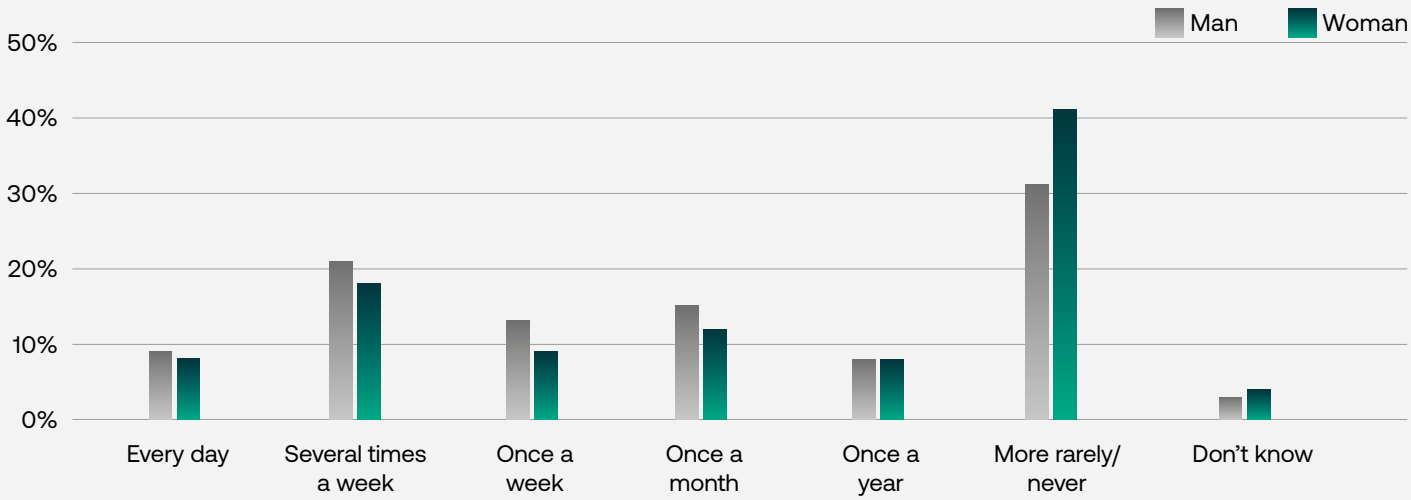


Gender



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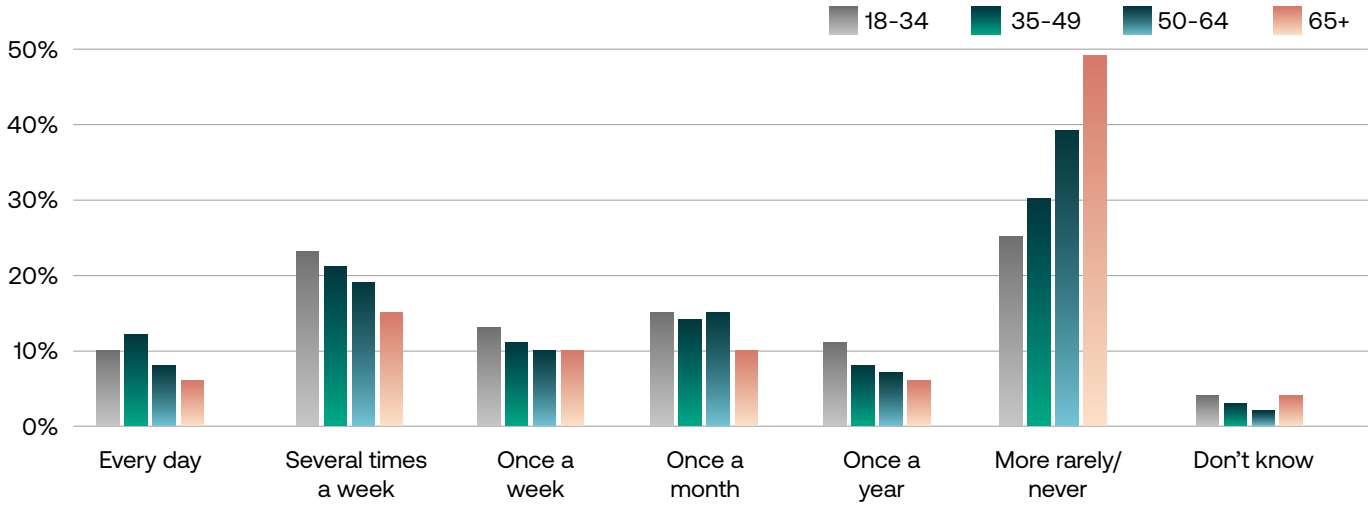
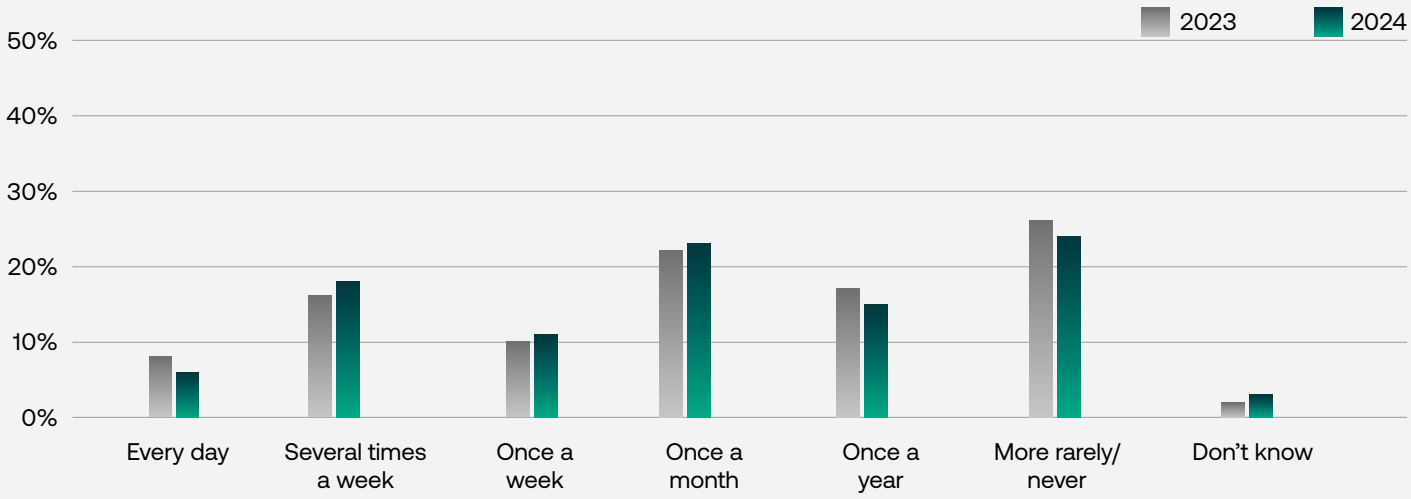


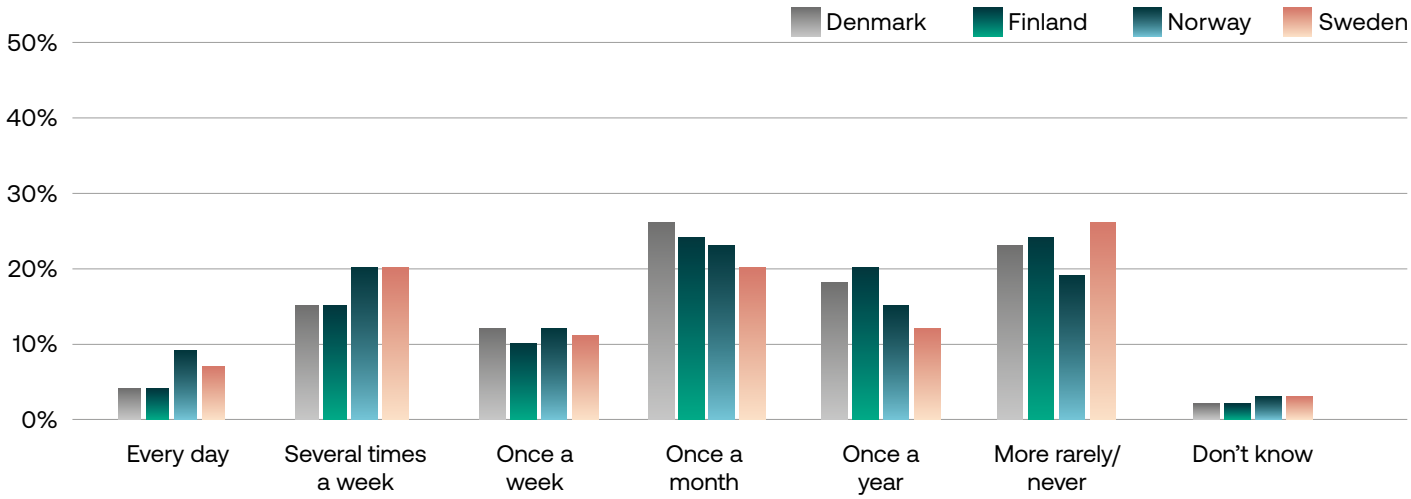
Where do you mainly live?

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

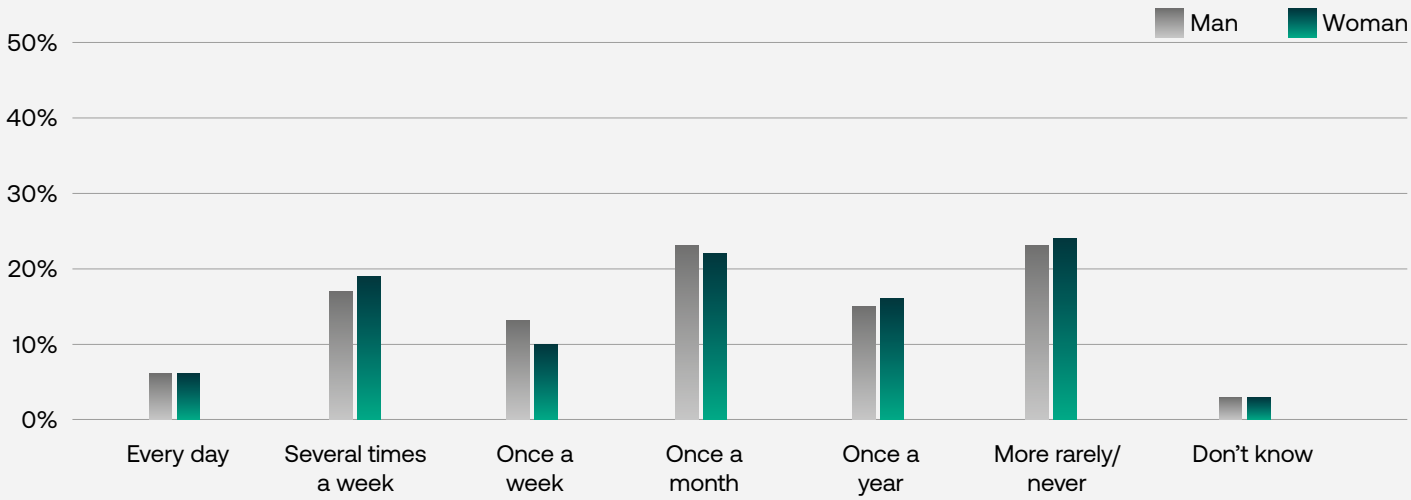
Total



Countries



Gender



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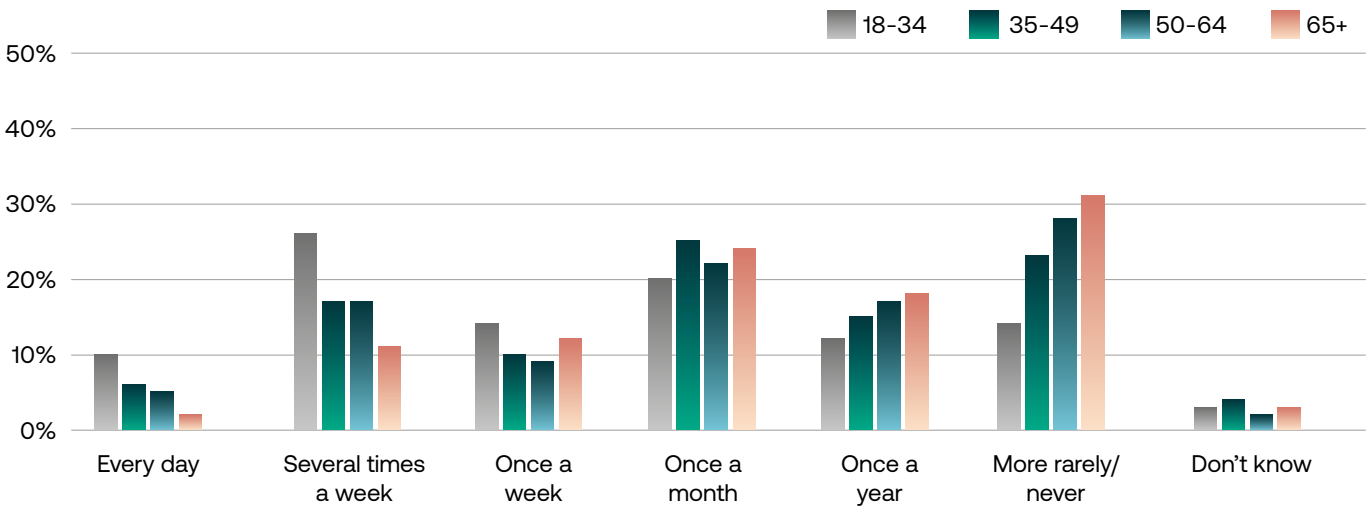
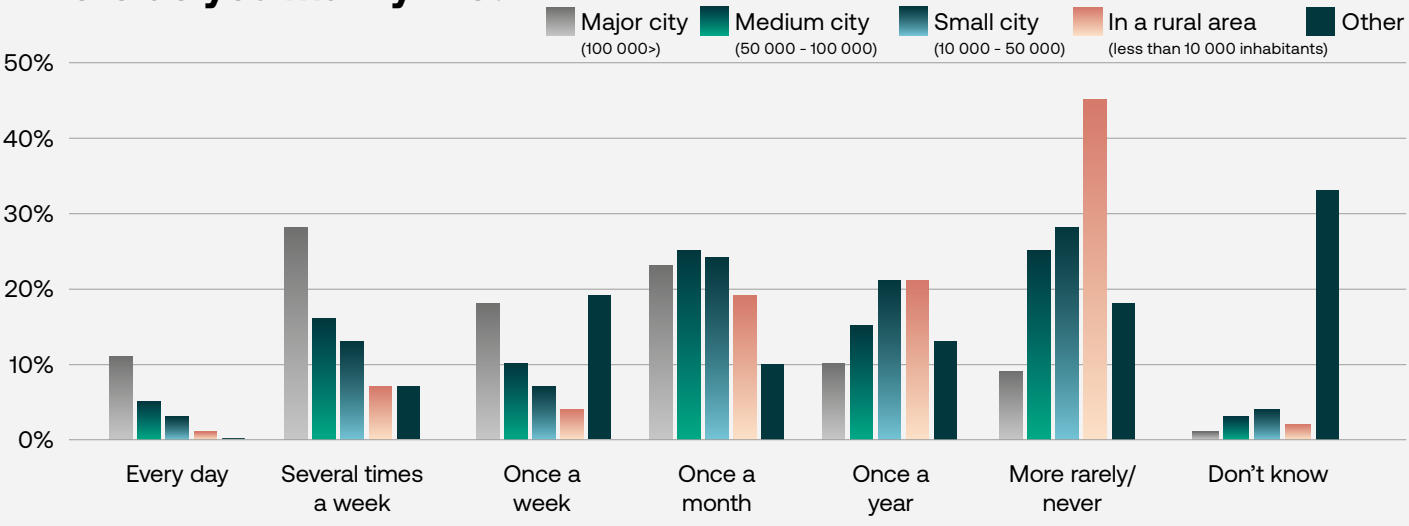
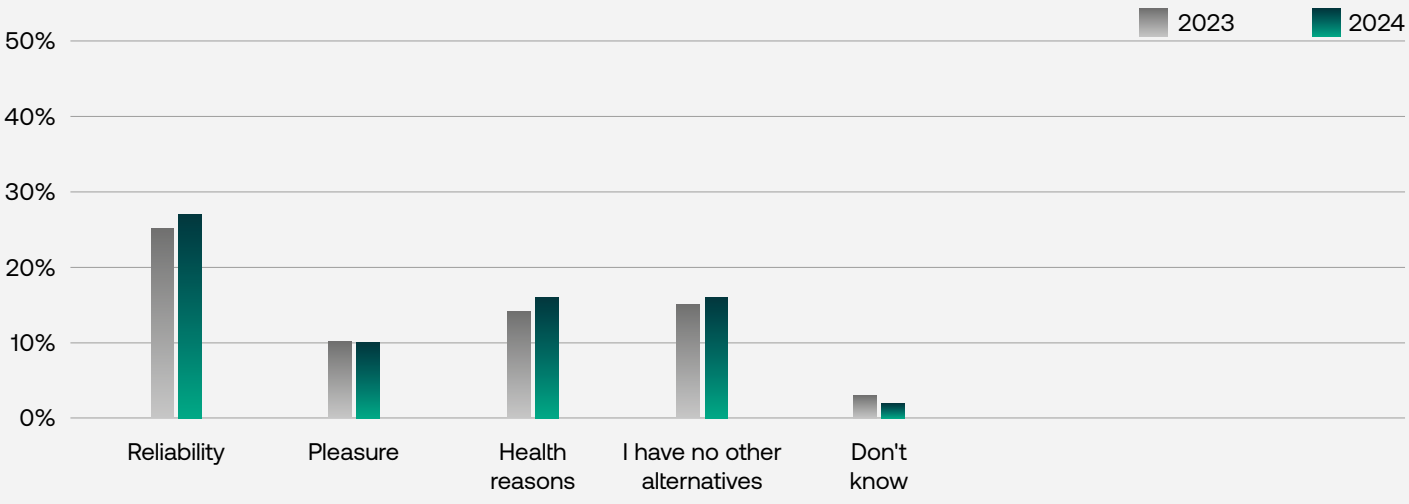


Where do you mainly live?



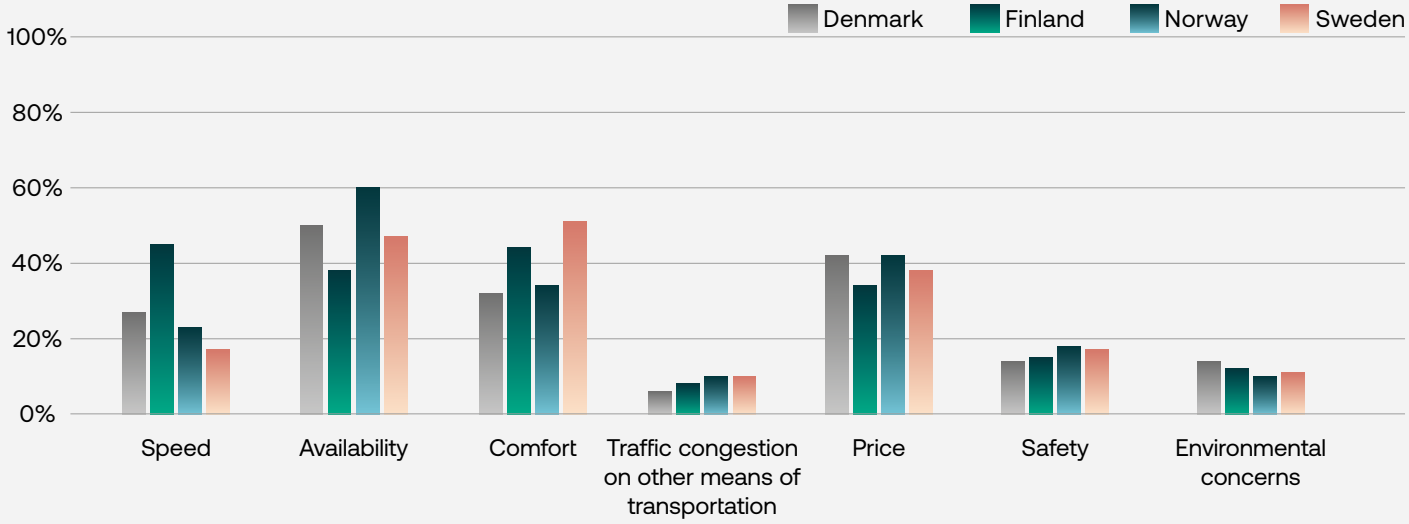
Which of the following determines what you use as a mean of transportation?

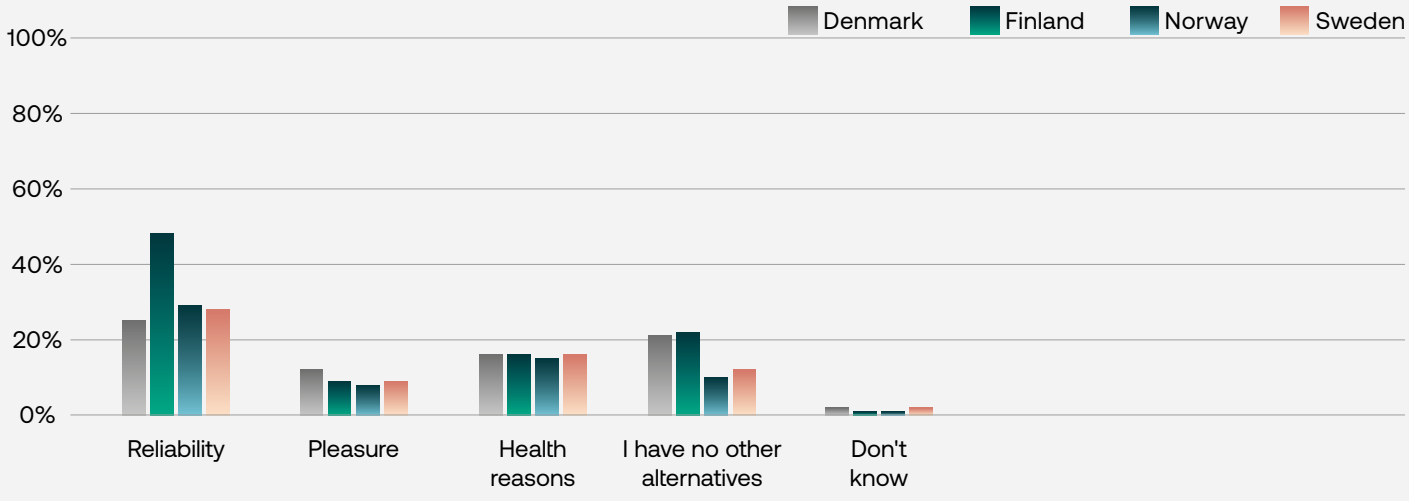
Total



Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

Countries

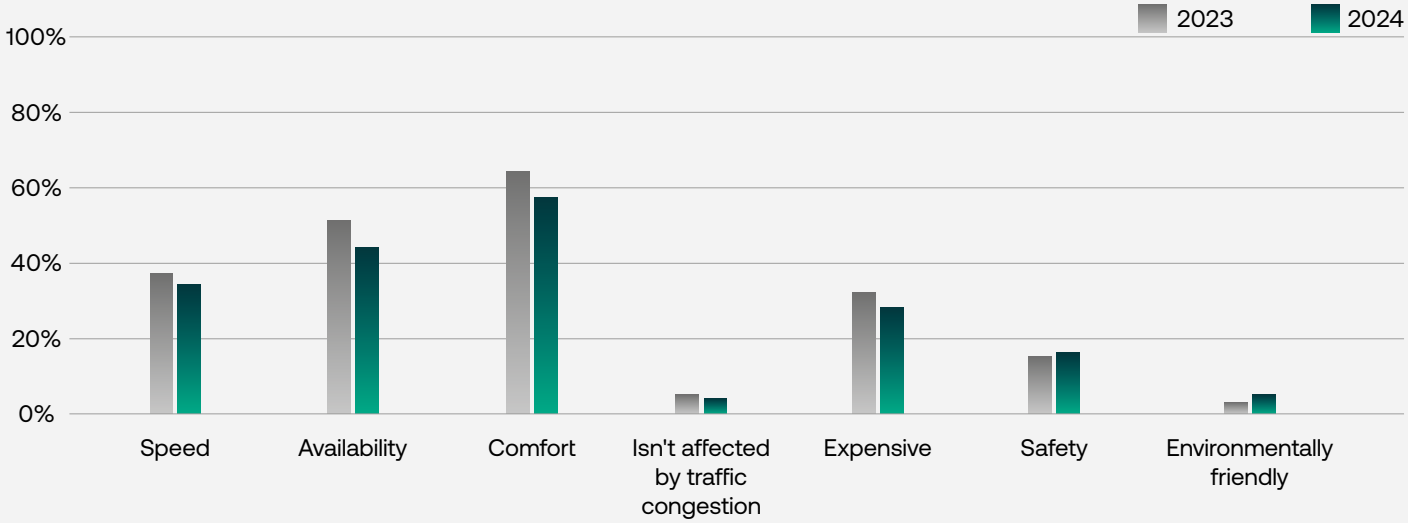


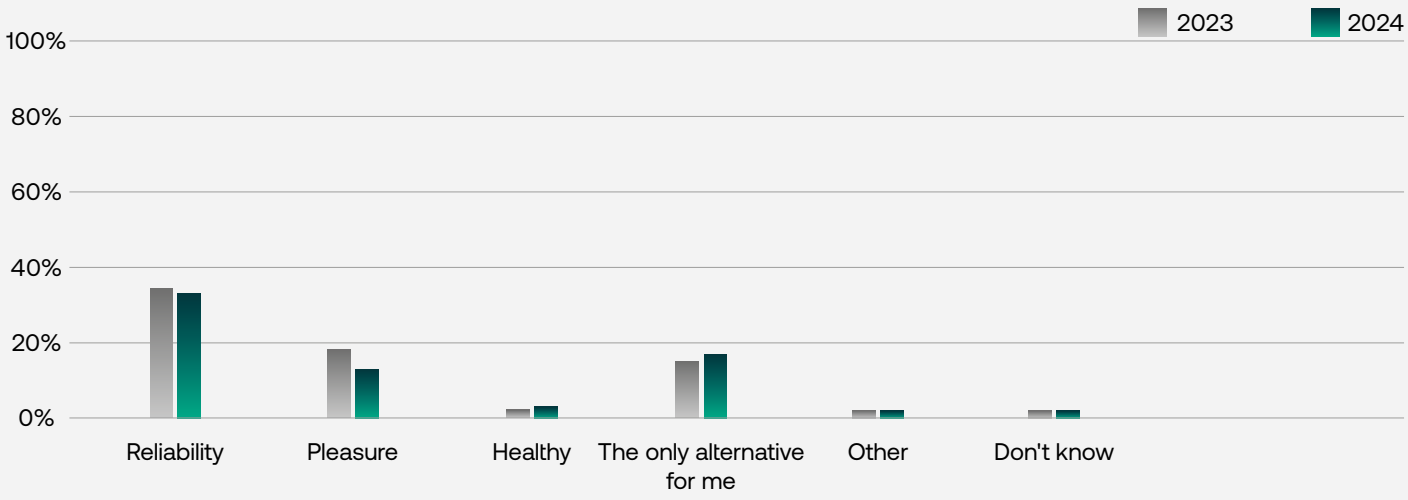


Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

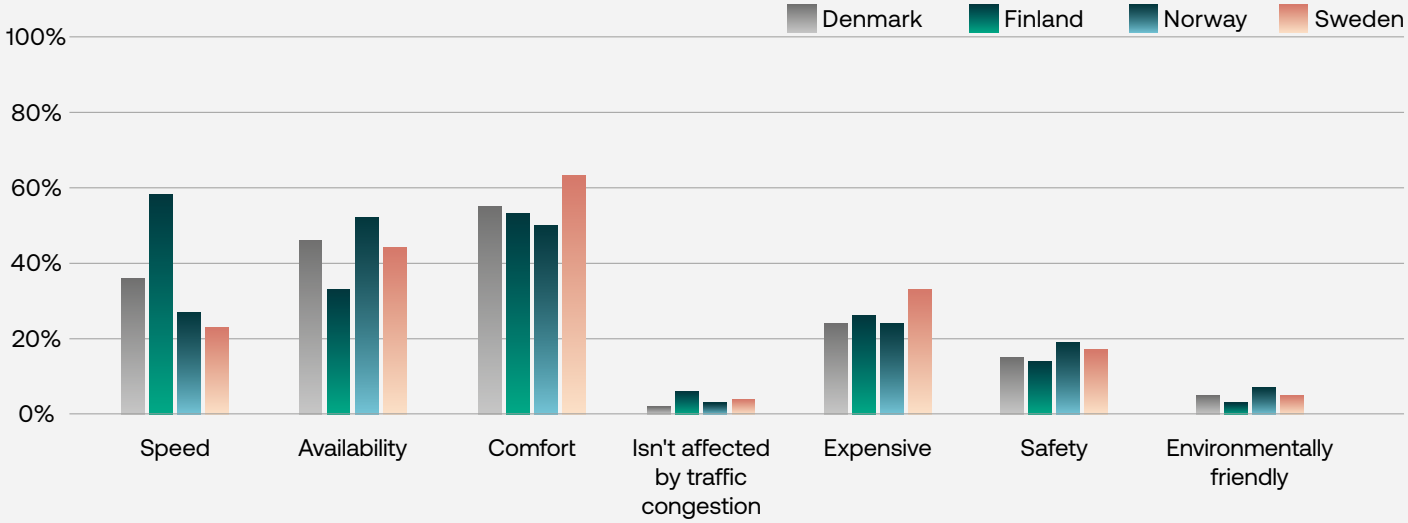
Total

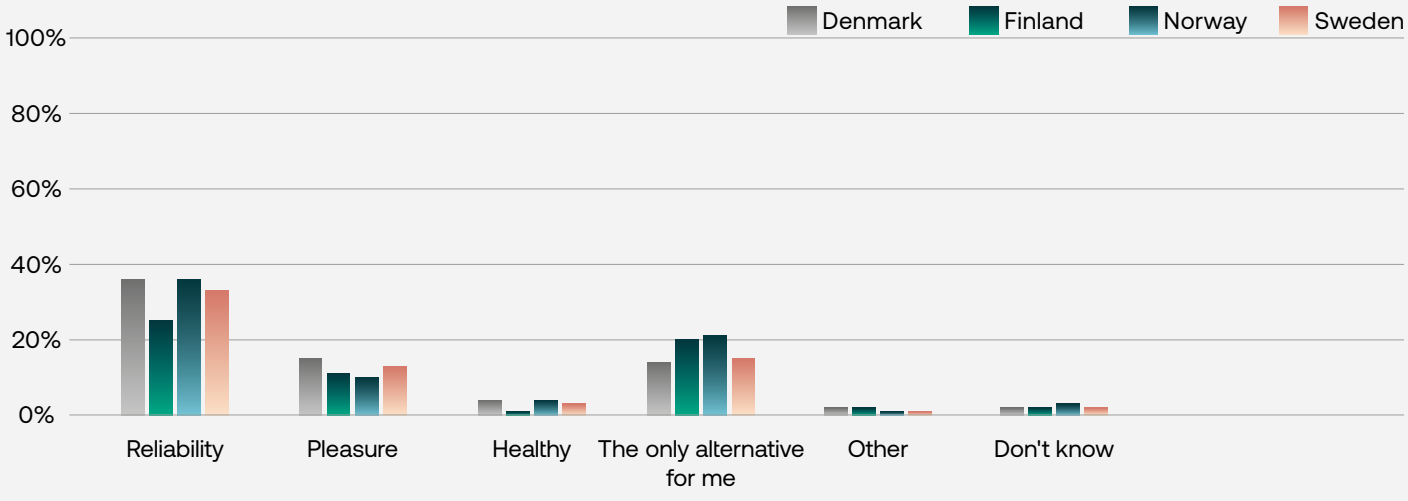




Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

Countries

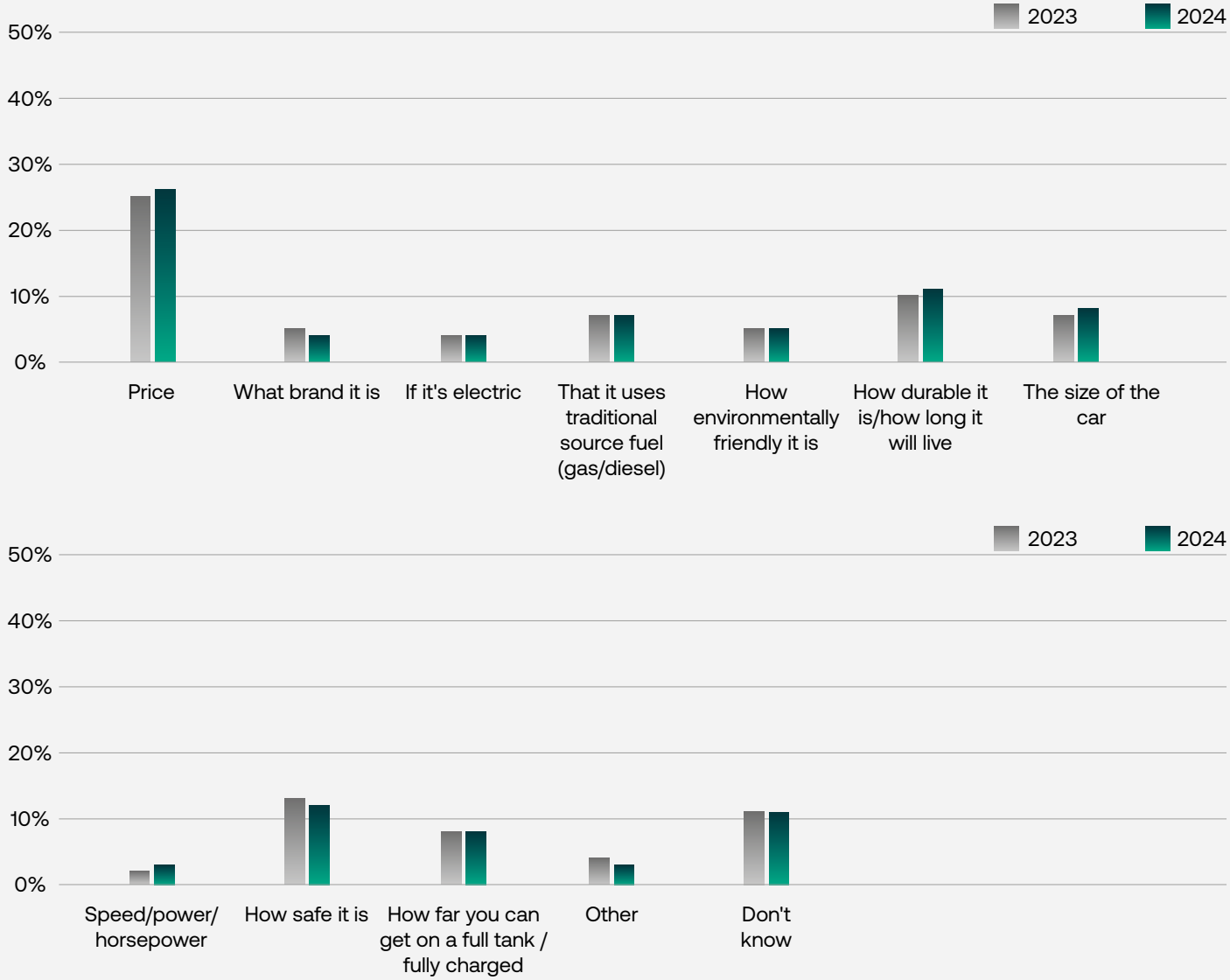




Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

Total

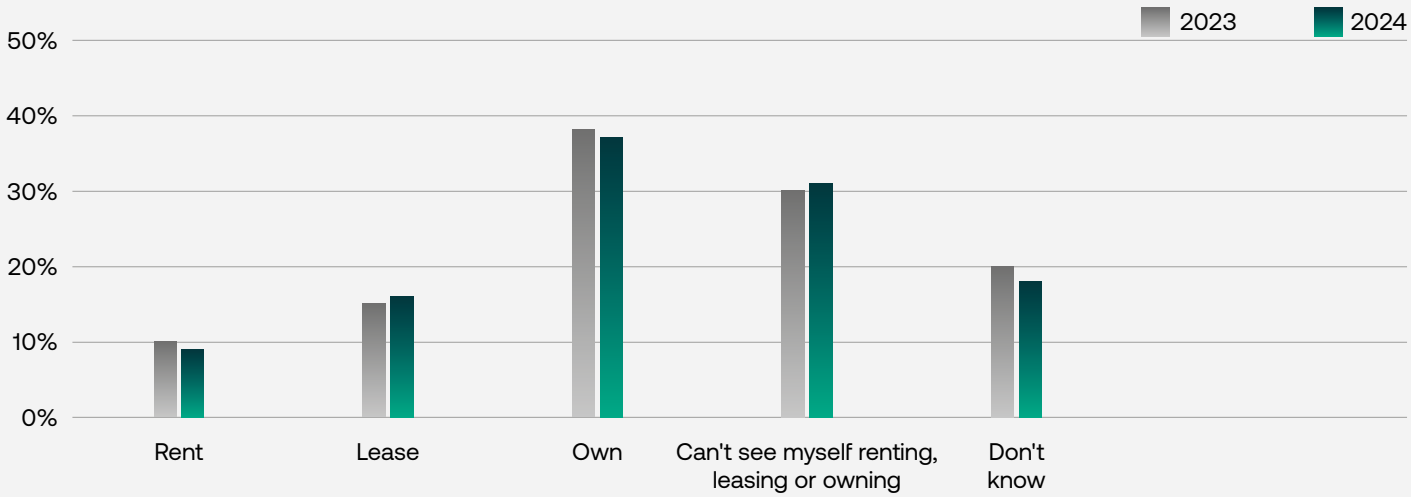


Countries

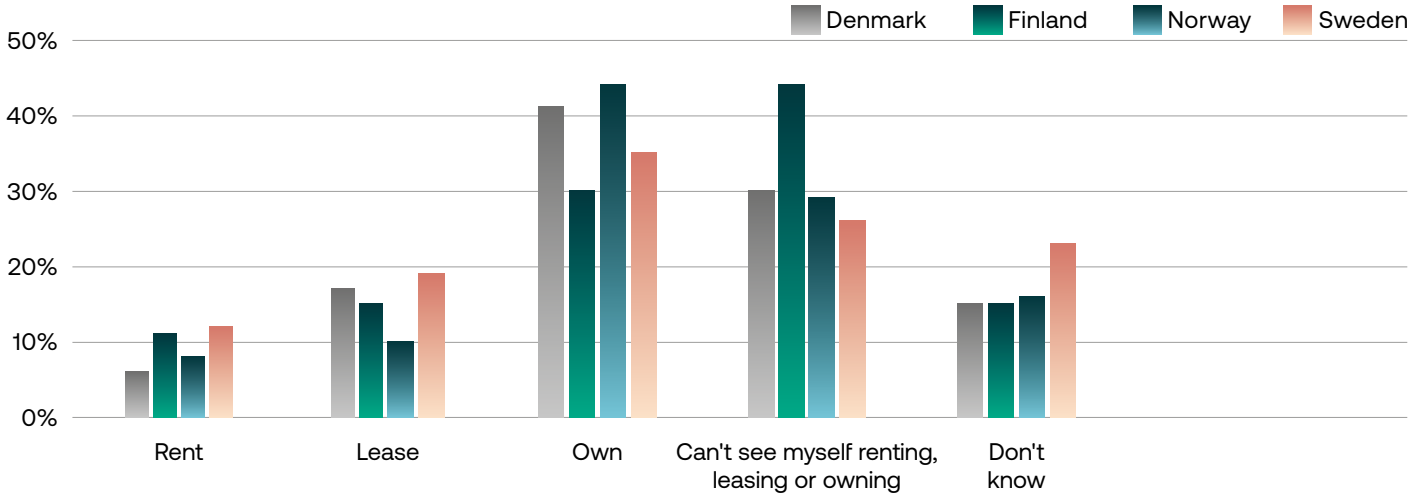

Denmark
Finland
Norway
Sweden
50%
40%
30%
20%
10%
0%
Price
What brand it is
If it's electric
That it uses traditional source fuel (gas/diesel)
How environmentally friendly it is
How durable it is/how long it will live
The size of the car
Speed/power/ horsepower
How safe it is
How far you can get on a full tank / fully charged
Other
Don't know

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

Total



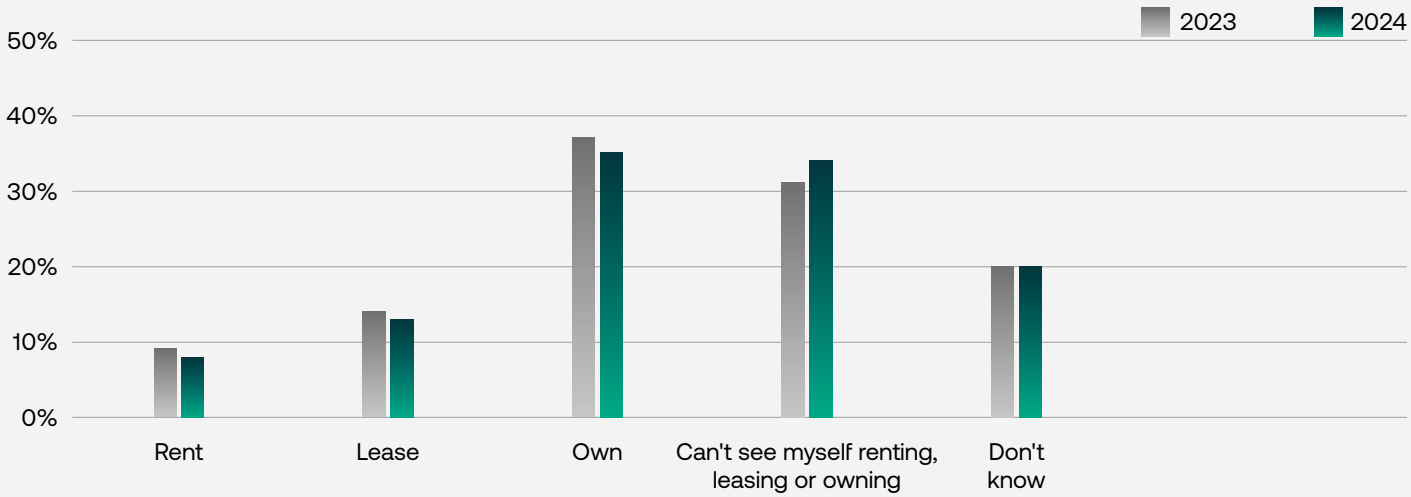
Countries



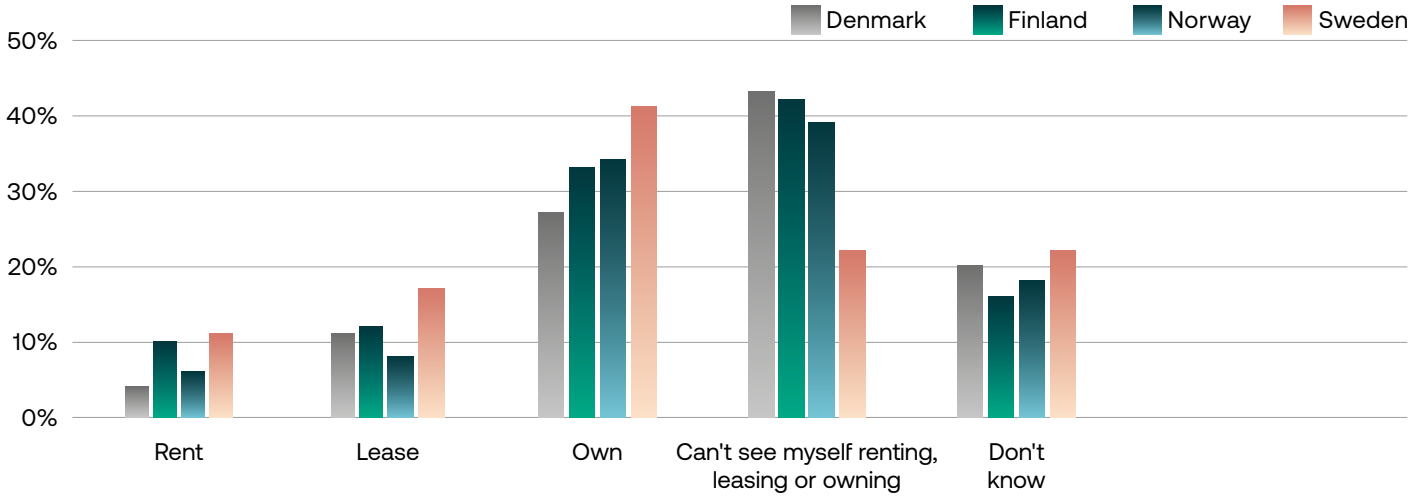
Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

Total



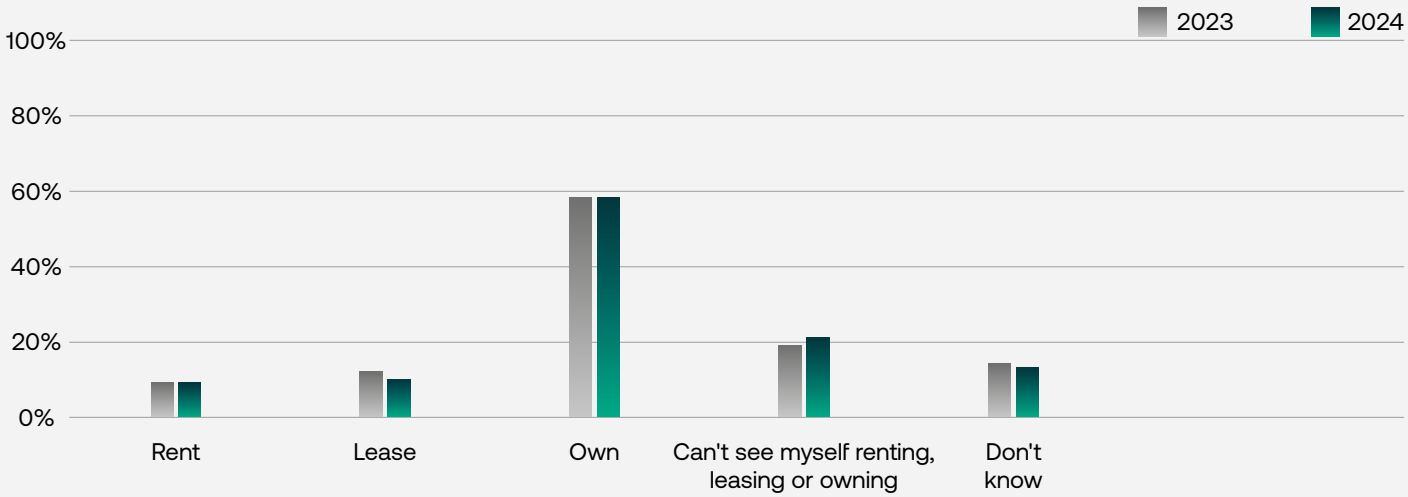
Countries



Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

Can you consider renting, leasing or owning a fossil fuel car?

Total



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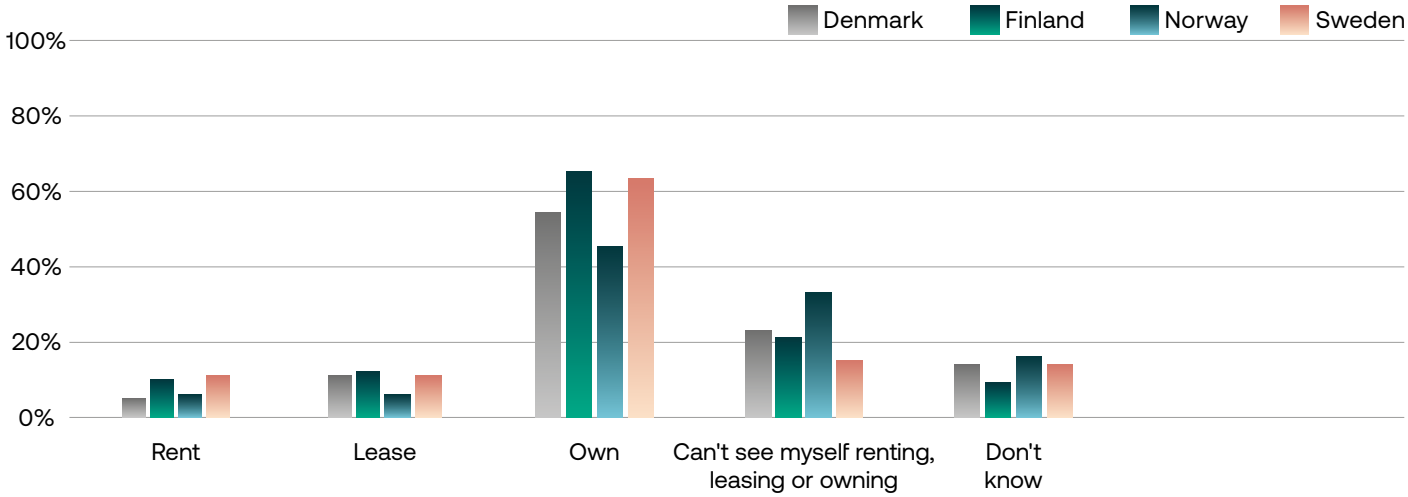
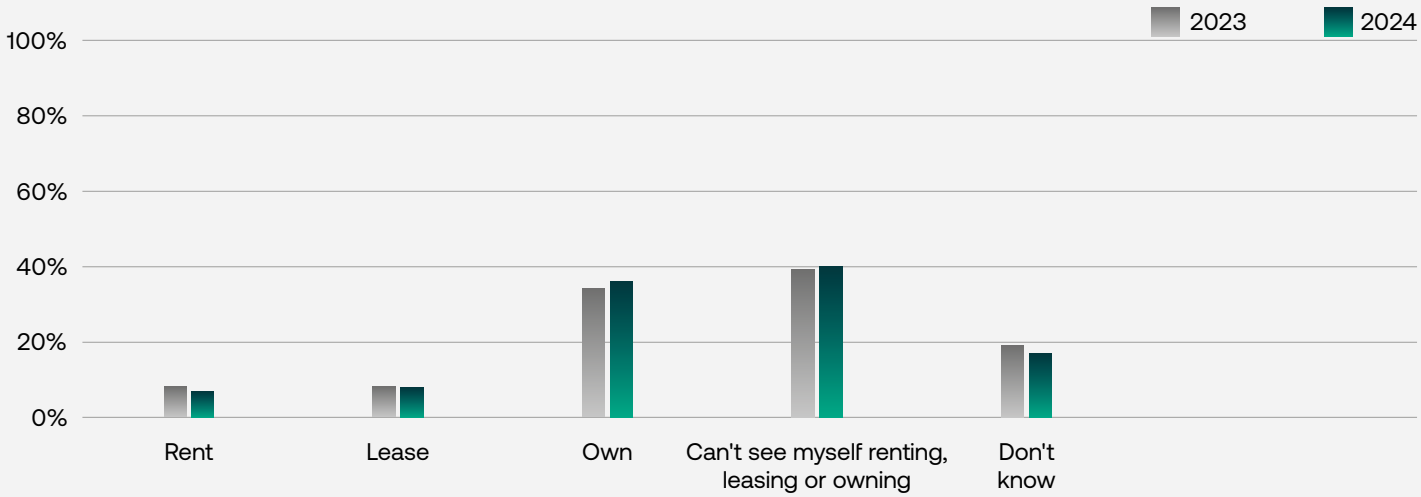


Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

Total



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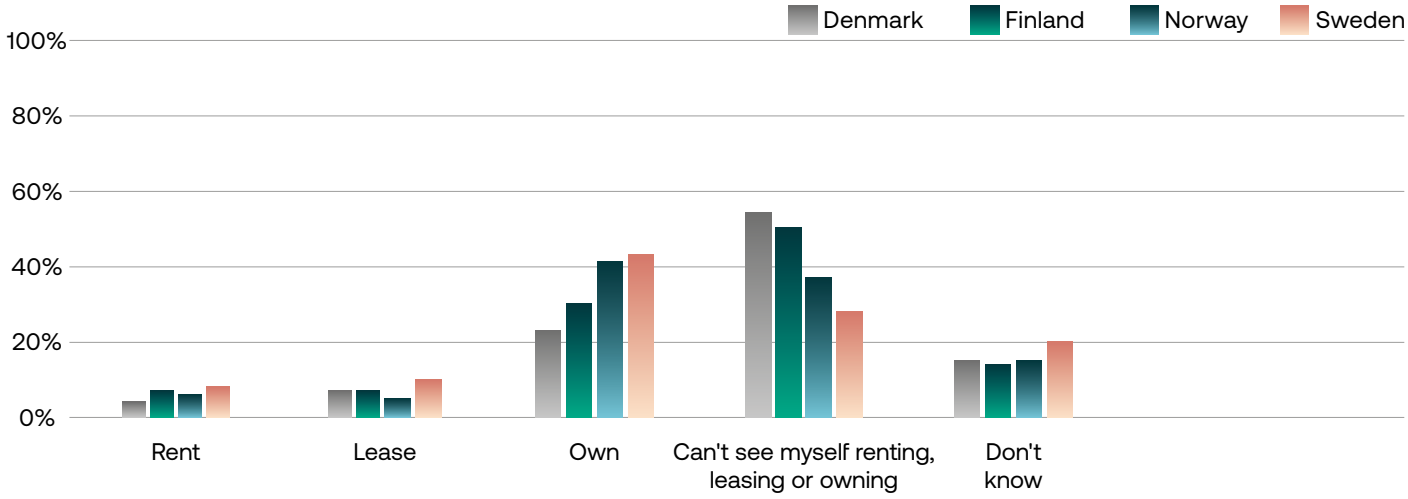
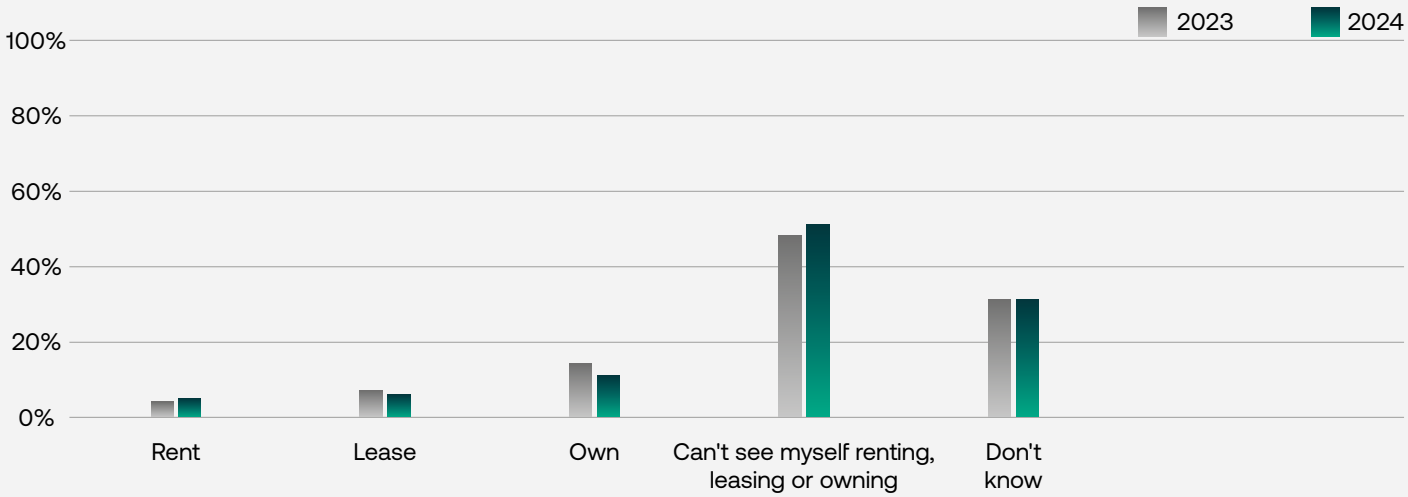


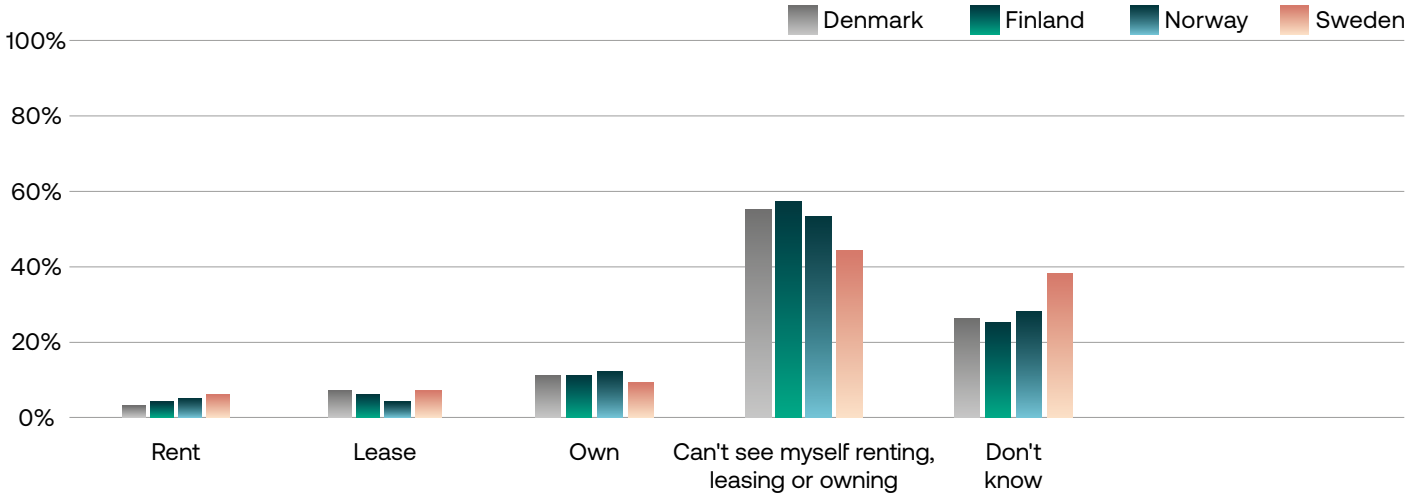
Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

Total



Countries

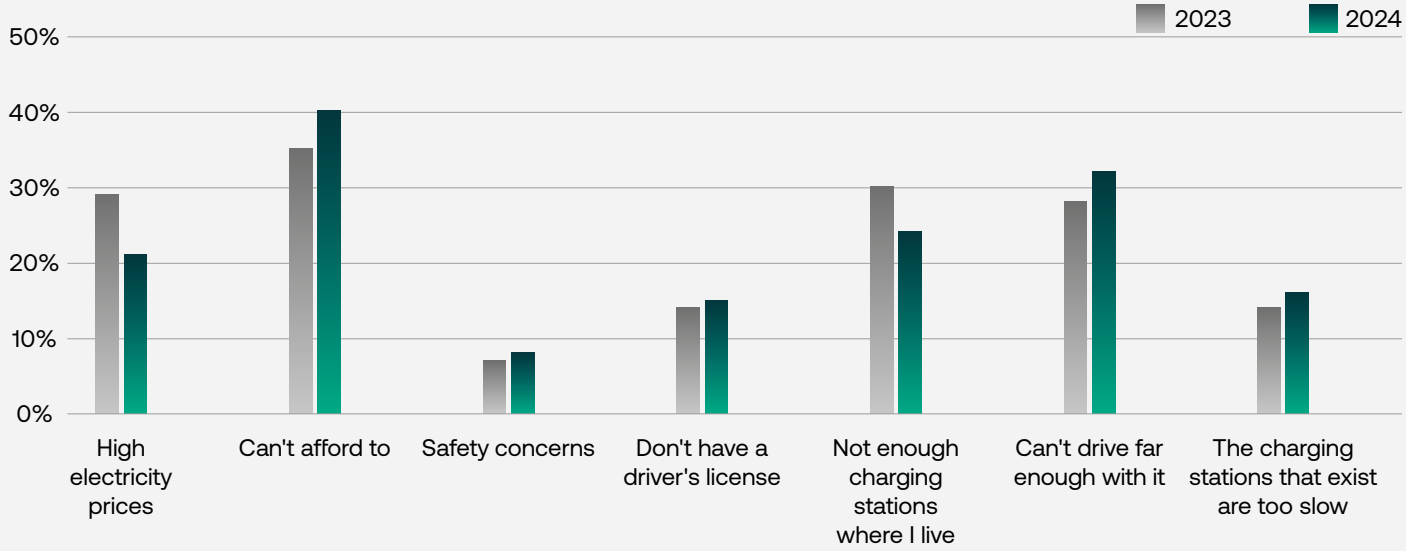


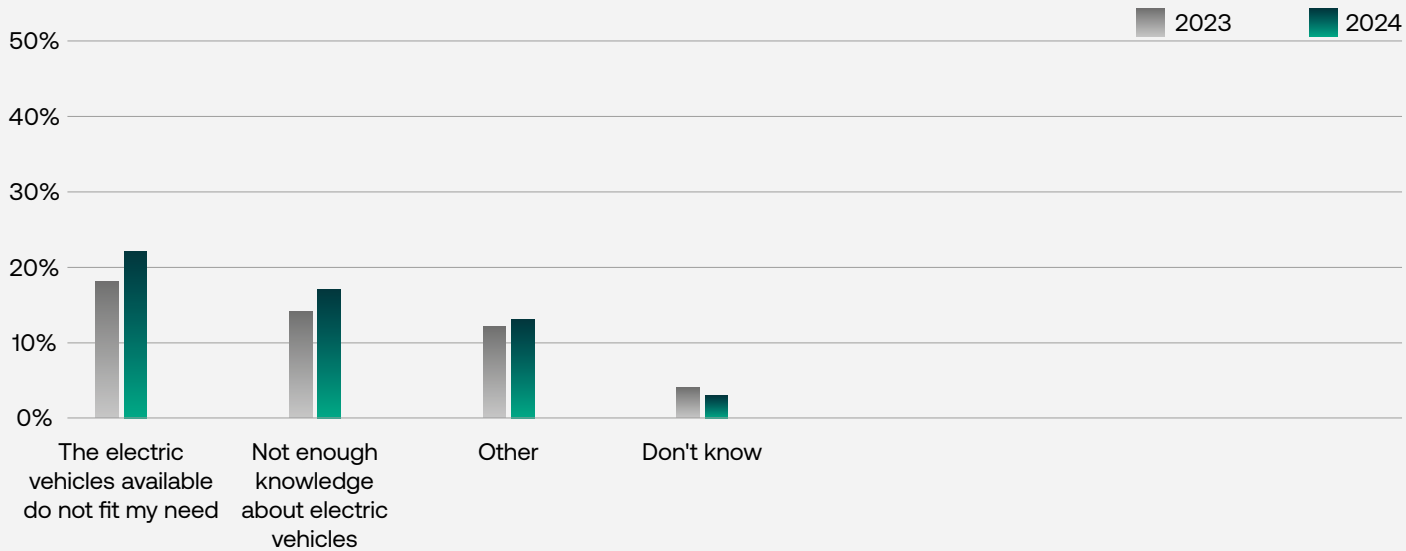
Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.


H2
700
bar
H2
700
H2

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

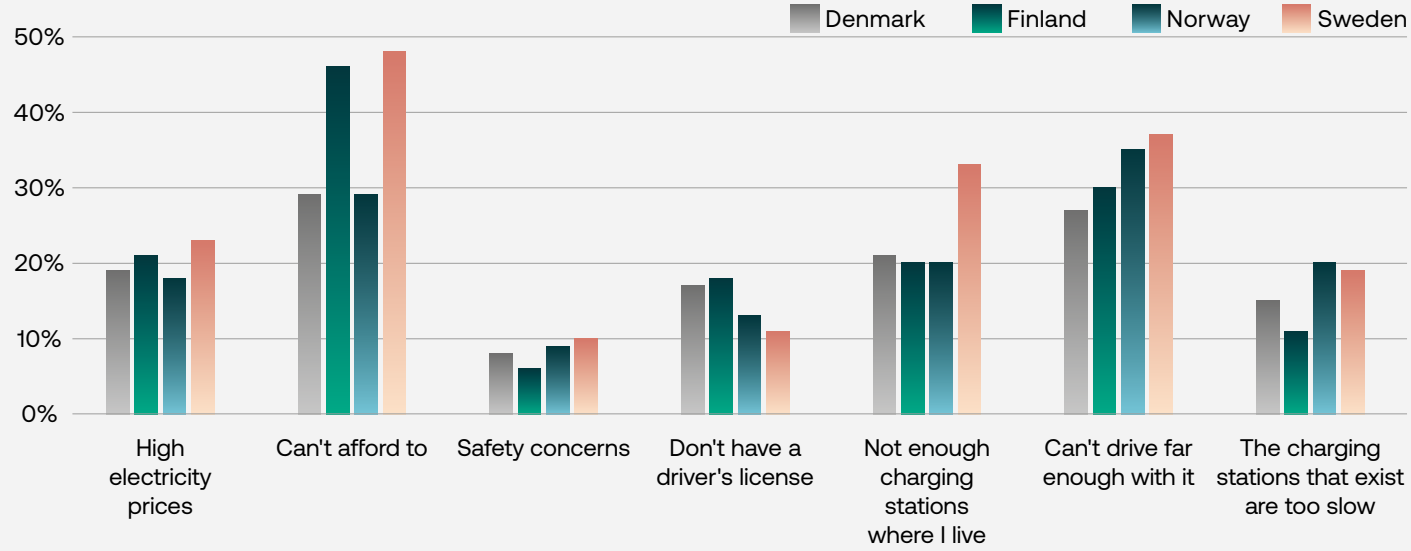
Total

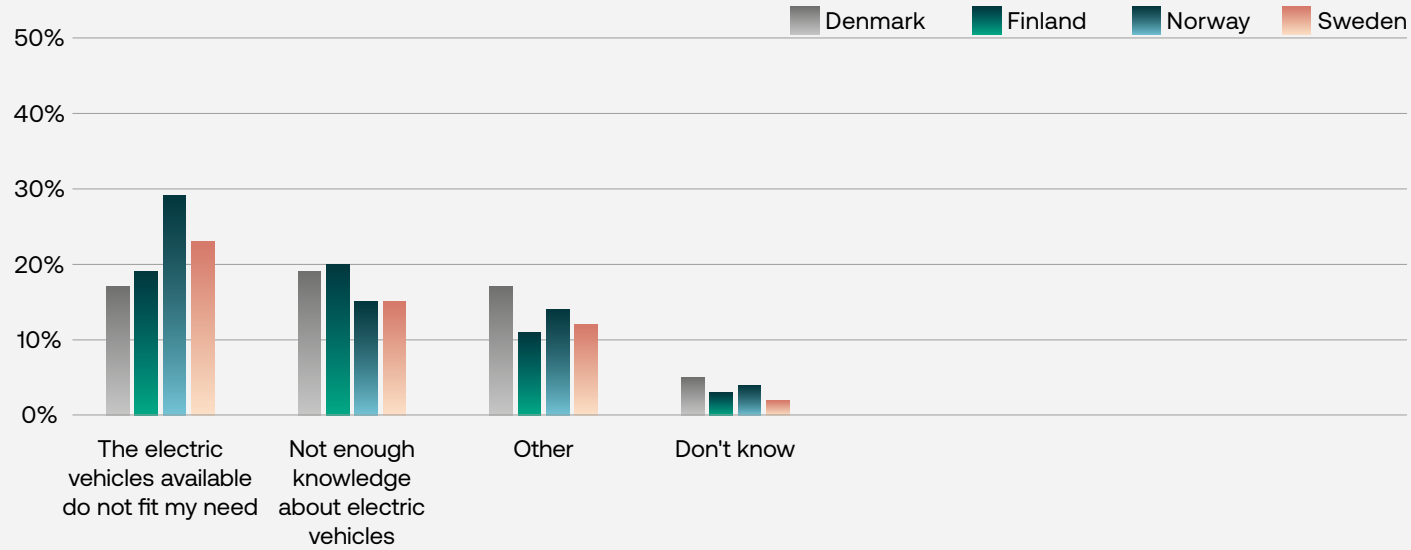




Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

Countries

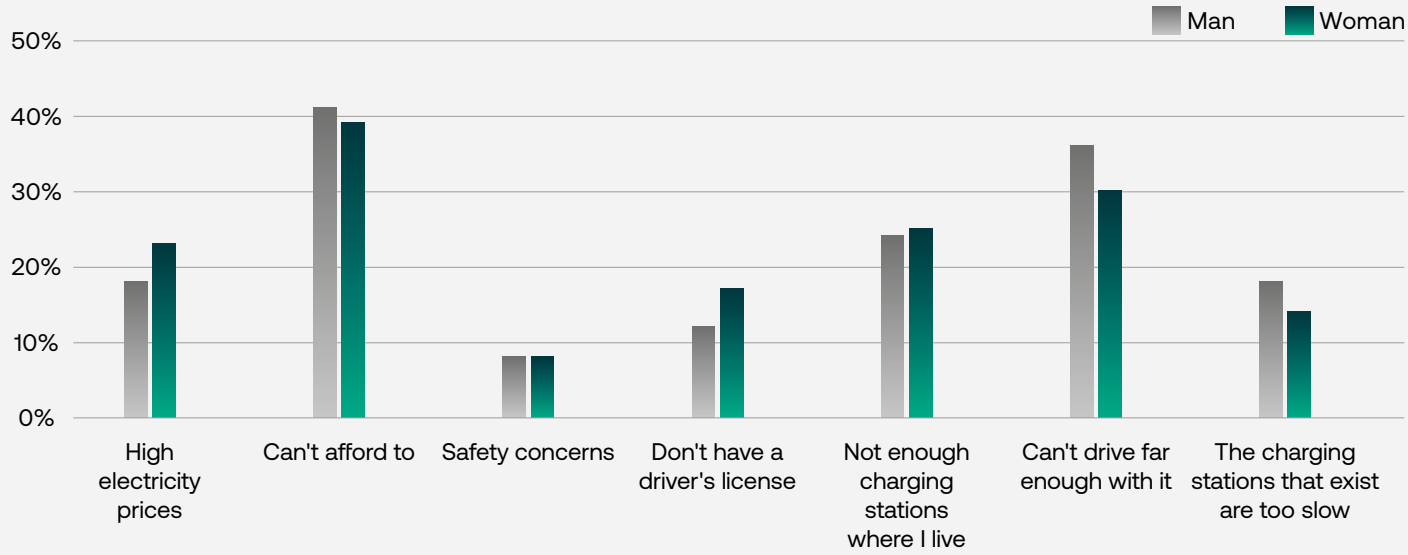


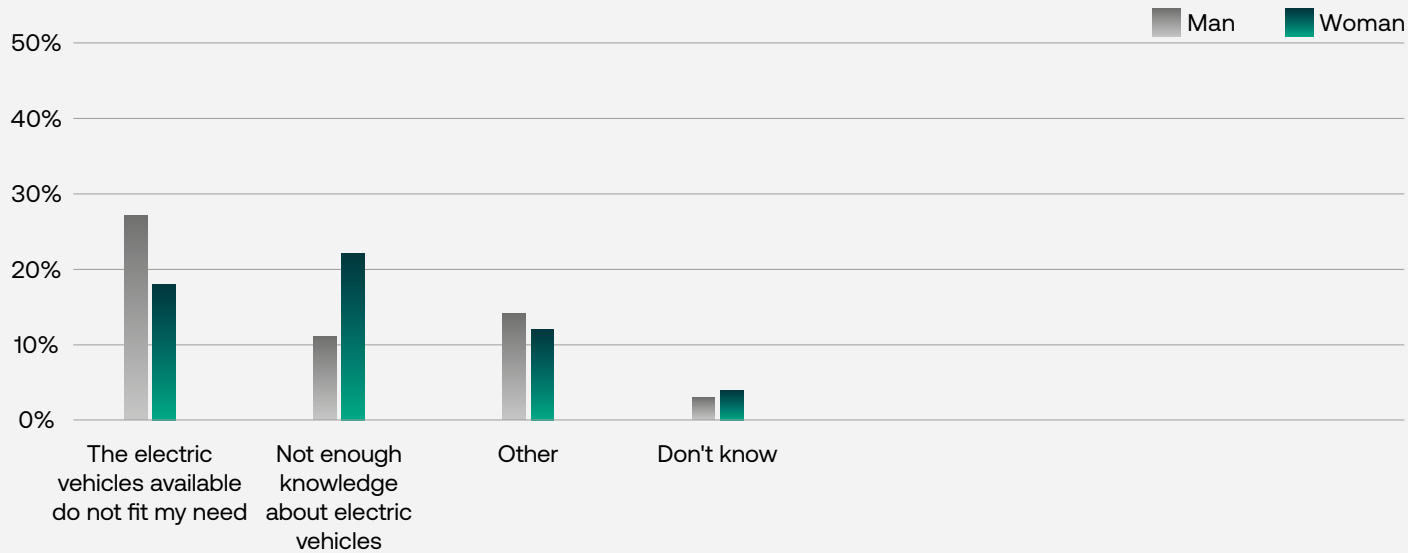


Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

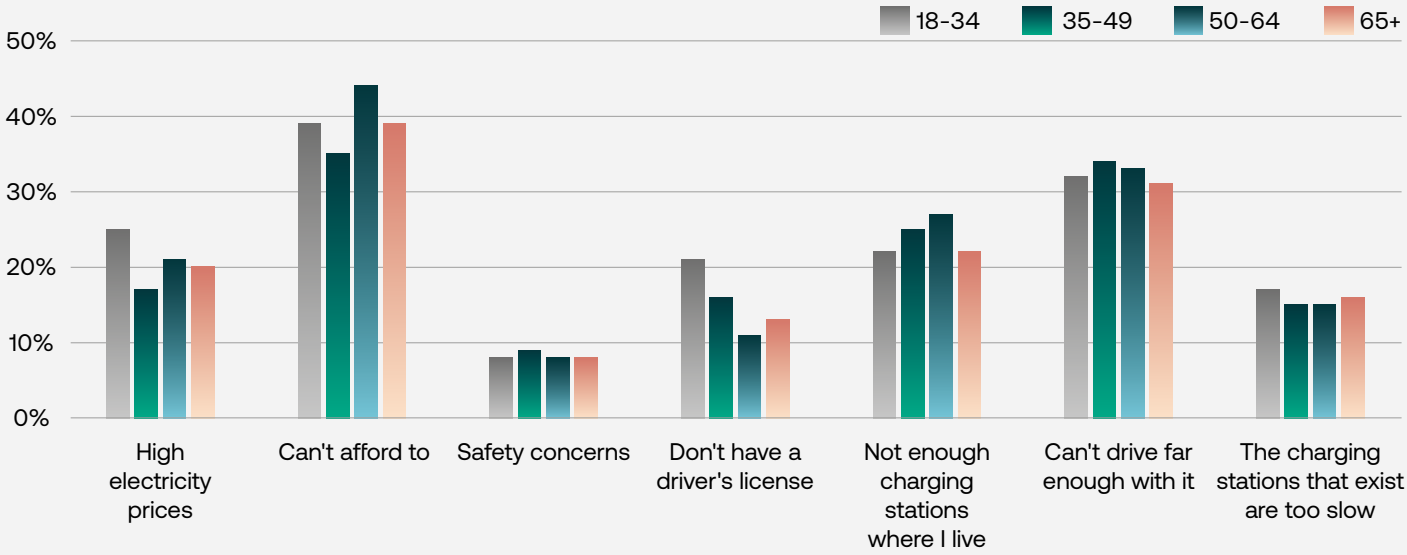
Gender

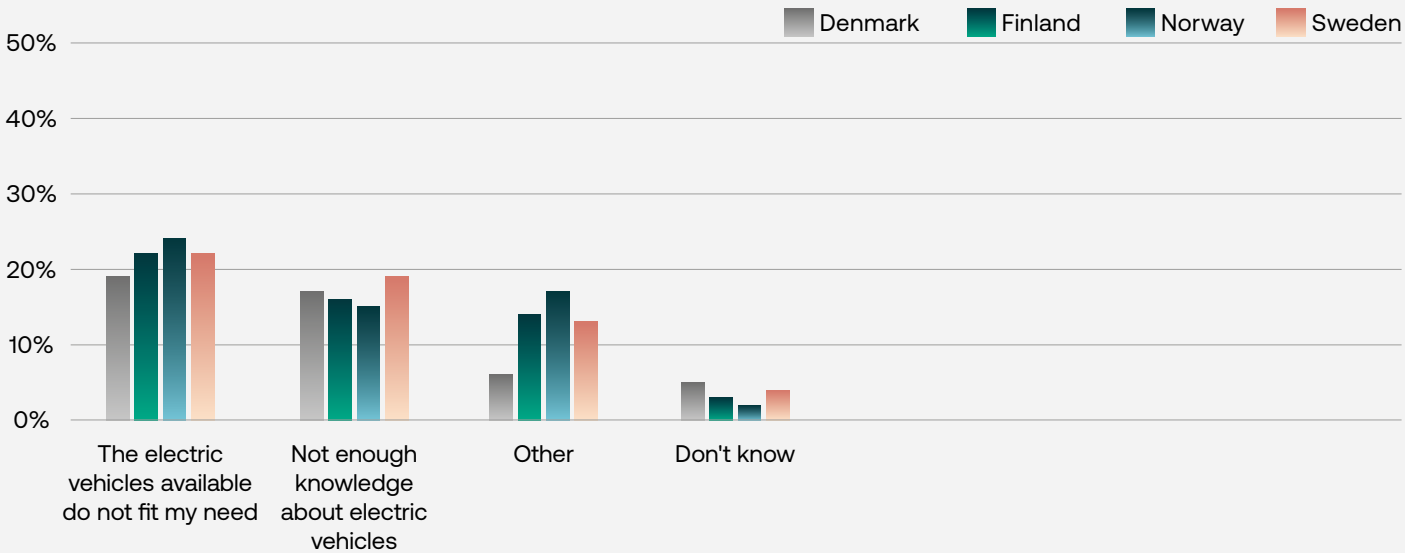




Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

Age

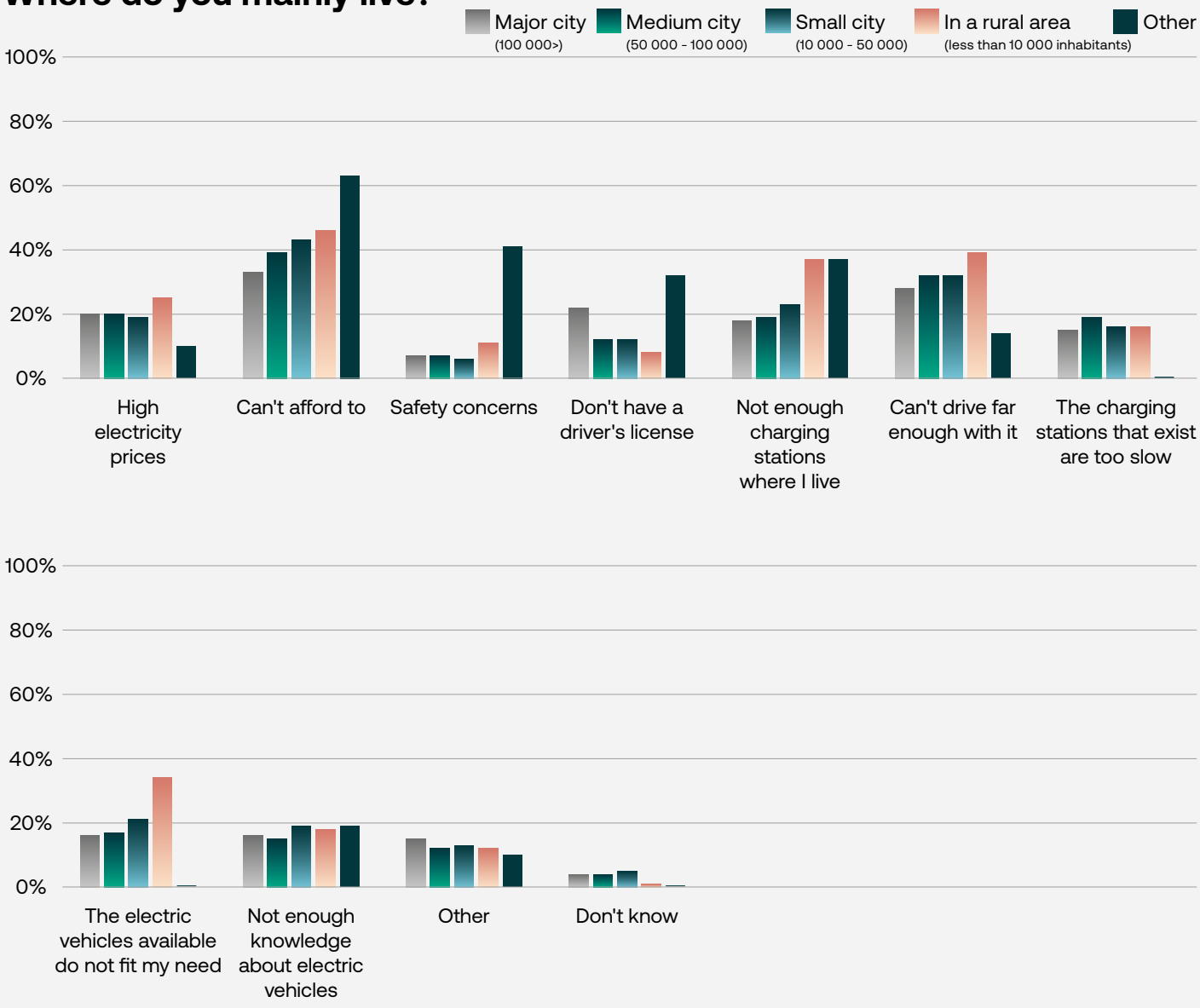




Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

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

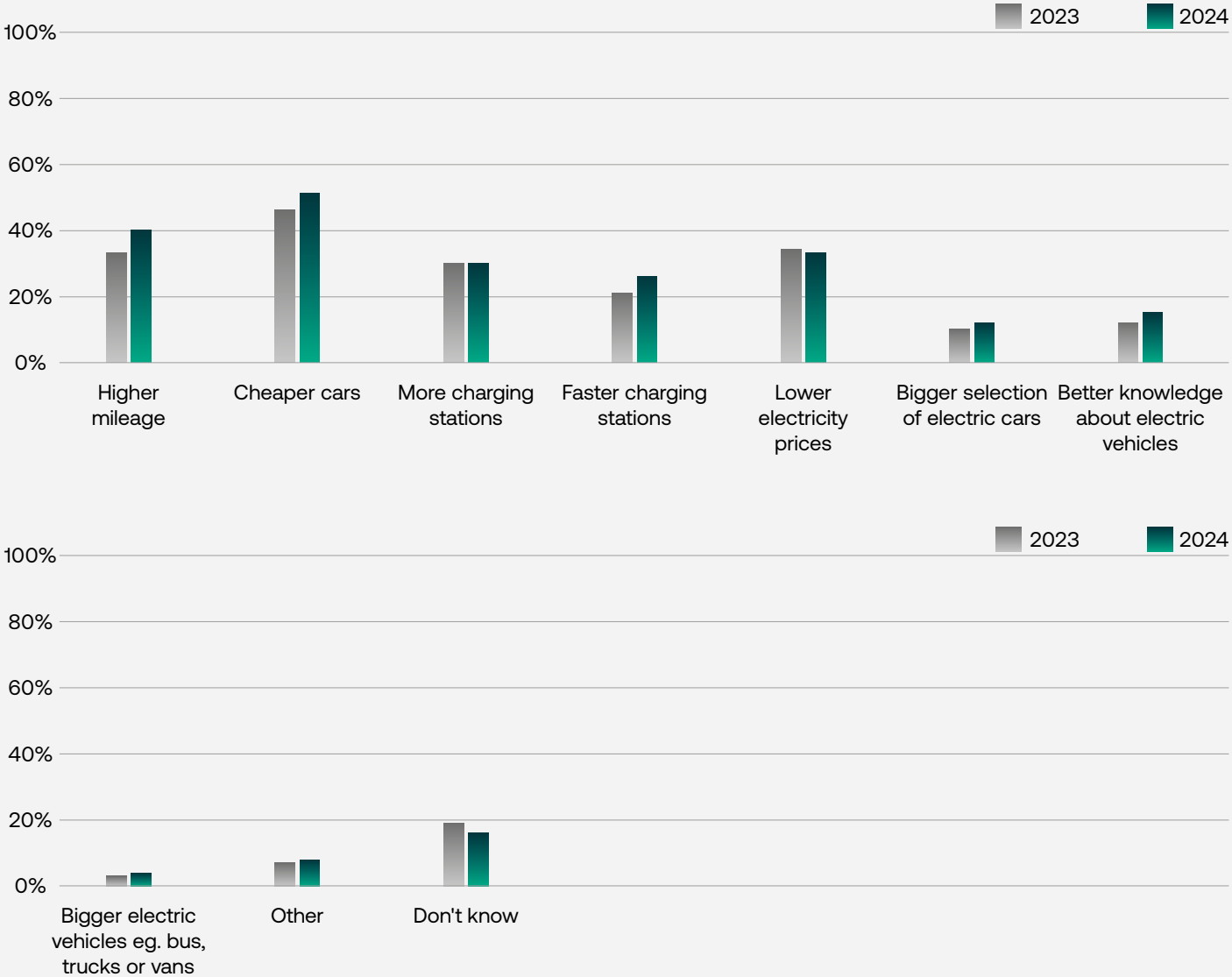
Where do you mainly live?



Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

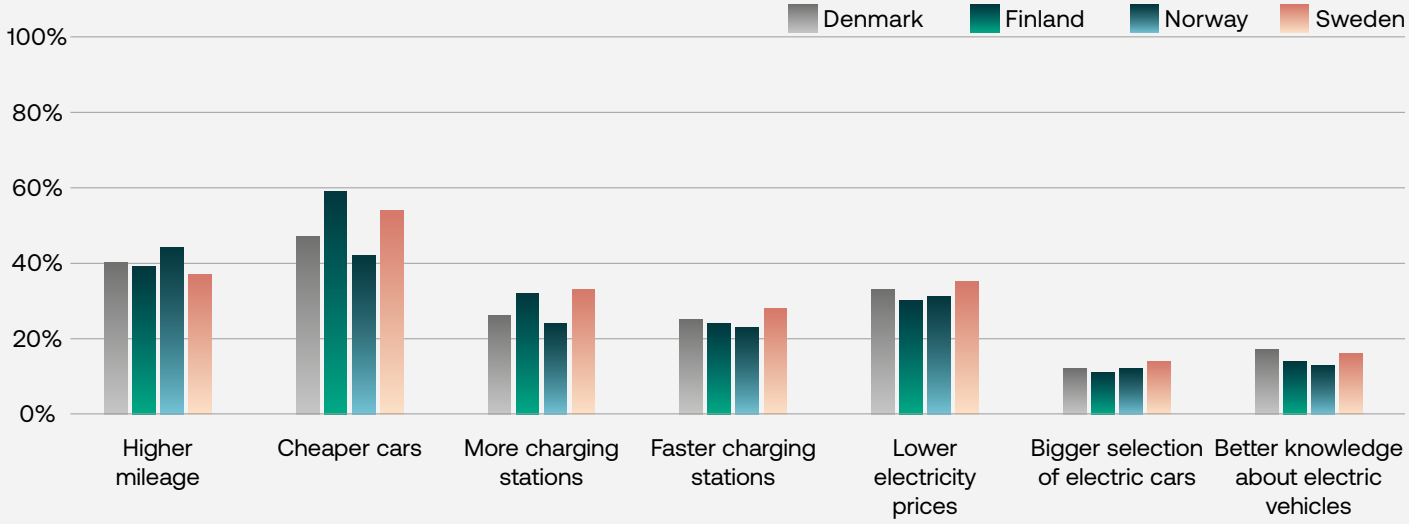
What would make you more likely to rent, lease or own an electric car?

Total



Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

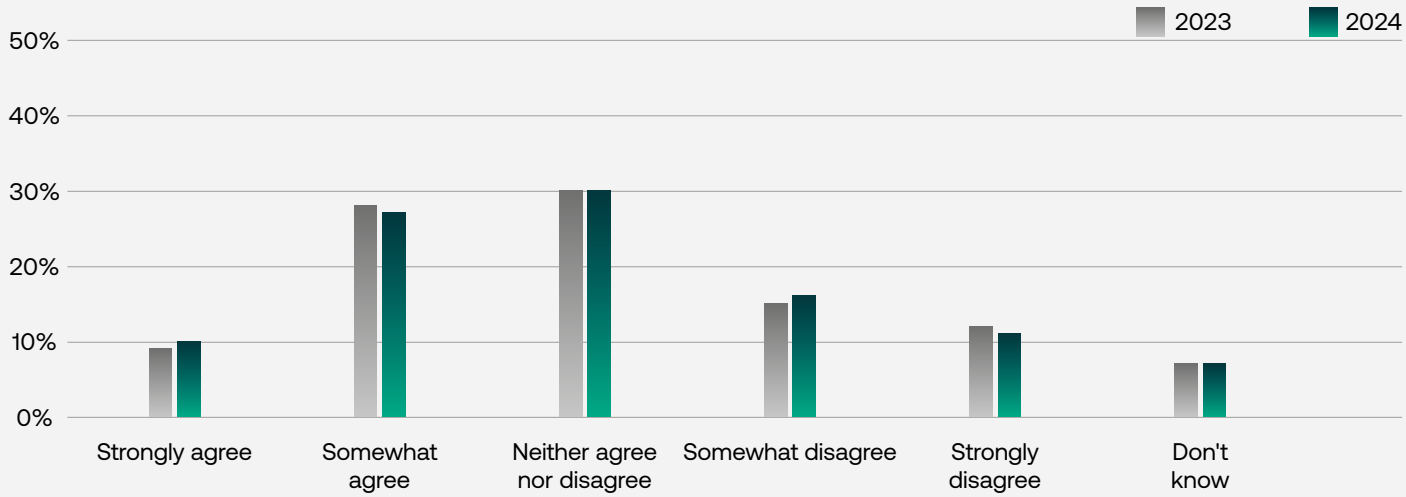
Countries



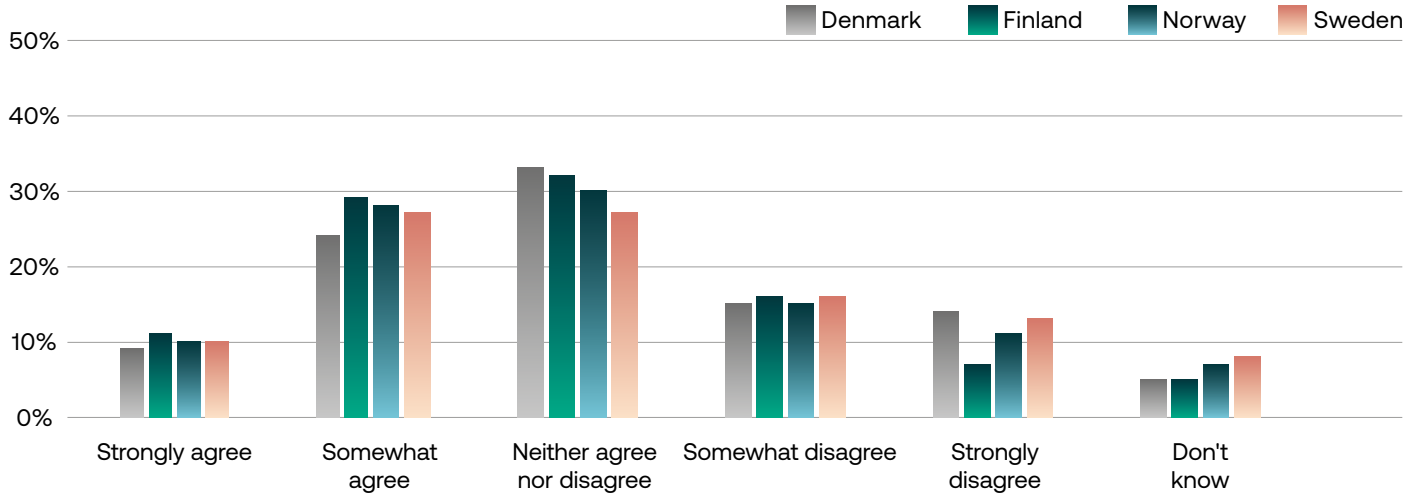
Note: Respondents were allowed to give more than one answer. Therefore, the columns do not necessarily add up to 100%.

The brand of the car matters a lot to me.

Total

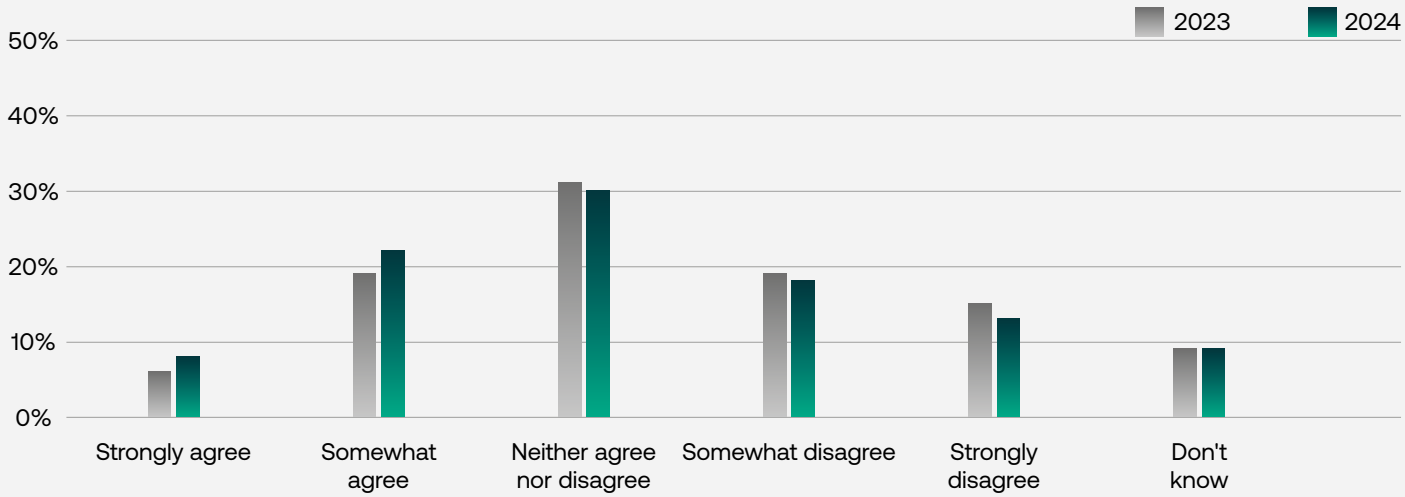


Countries

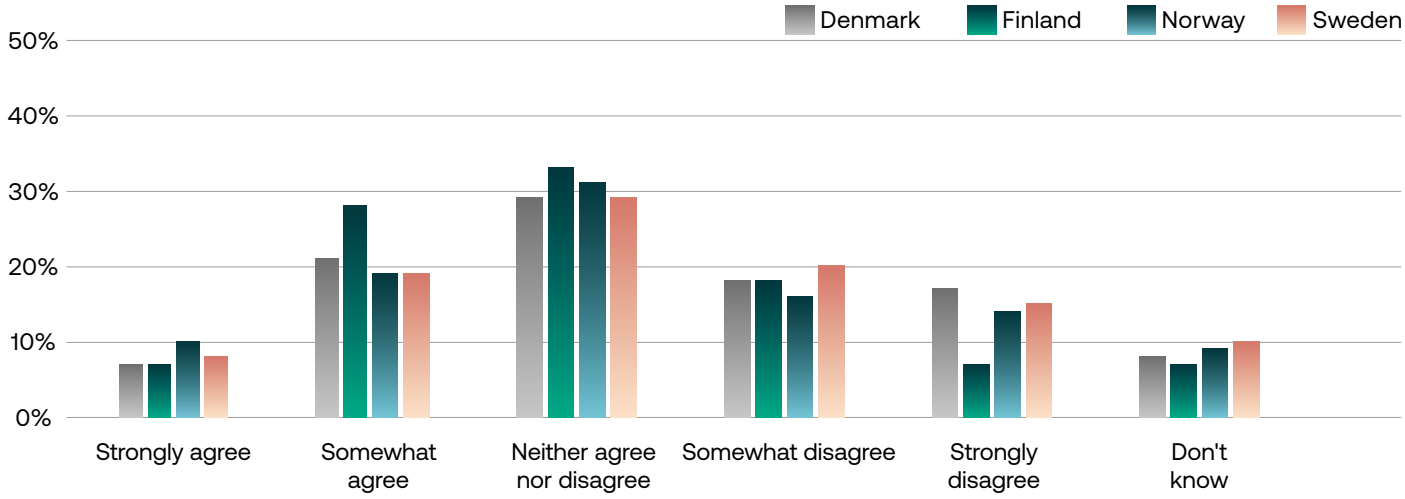


It matters to me which country the car I drive comes from.

Total

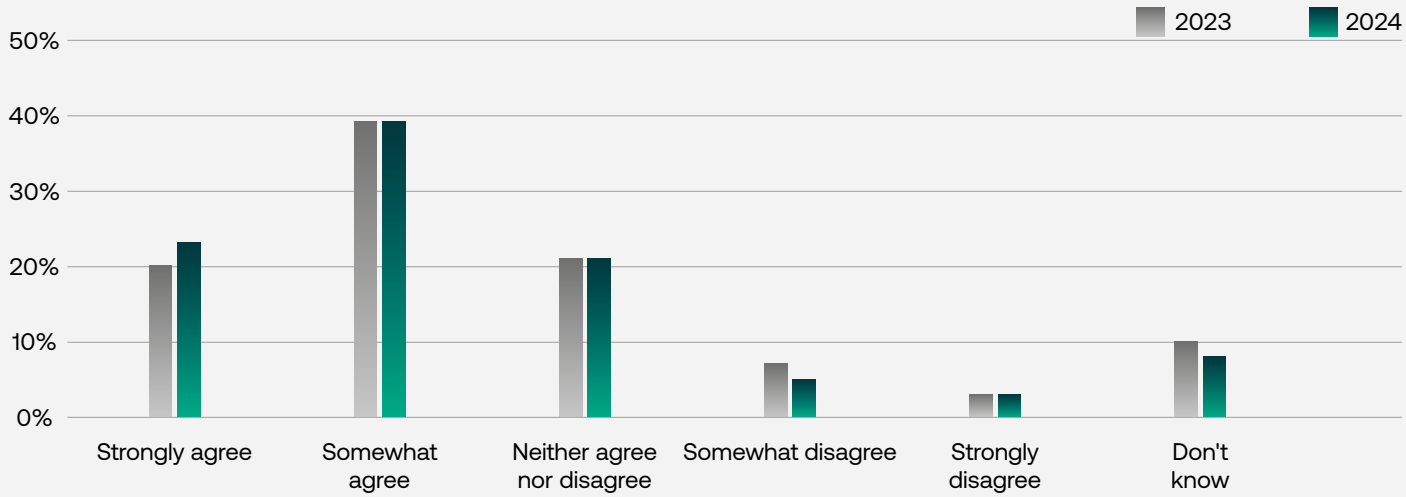


Countries

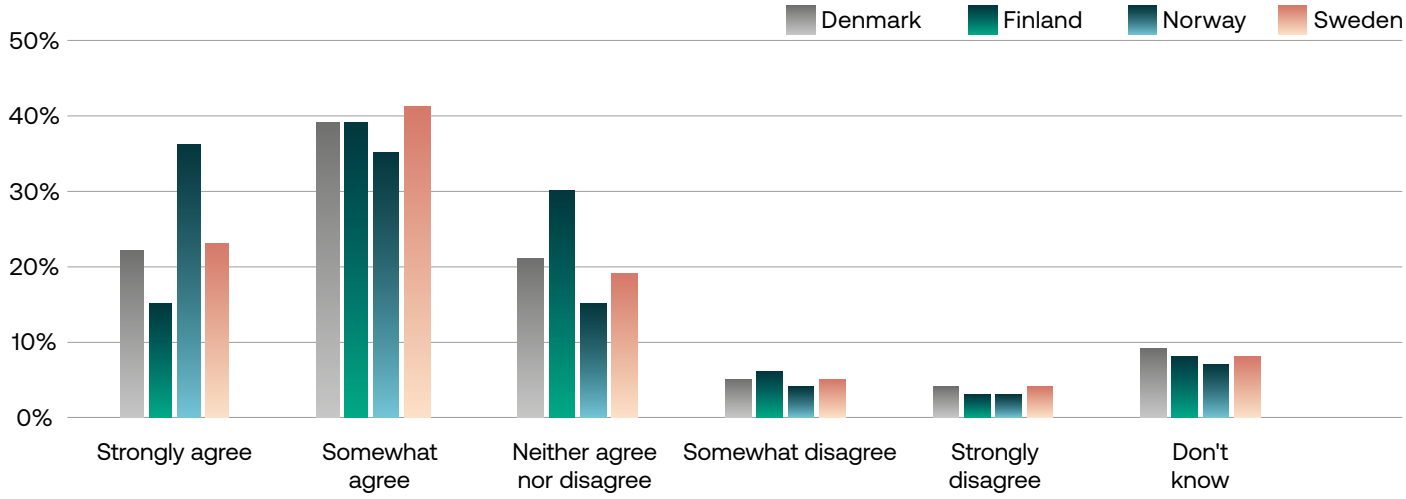


I think that cars will be a big part of the future.

Total

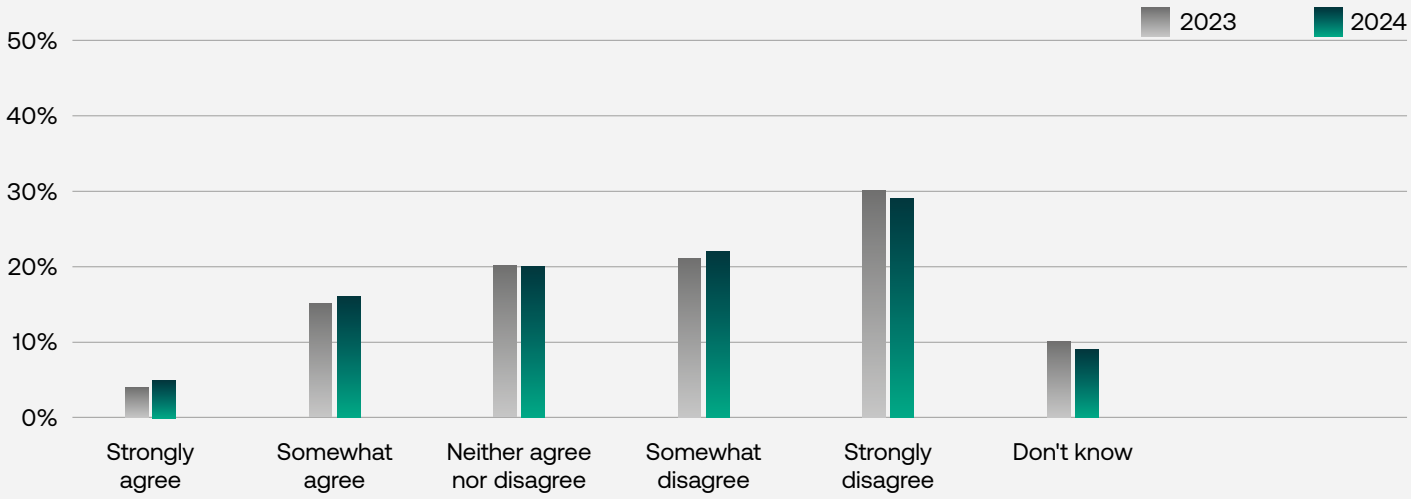


Countries



I can see myself sharing my car with other people.

Total



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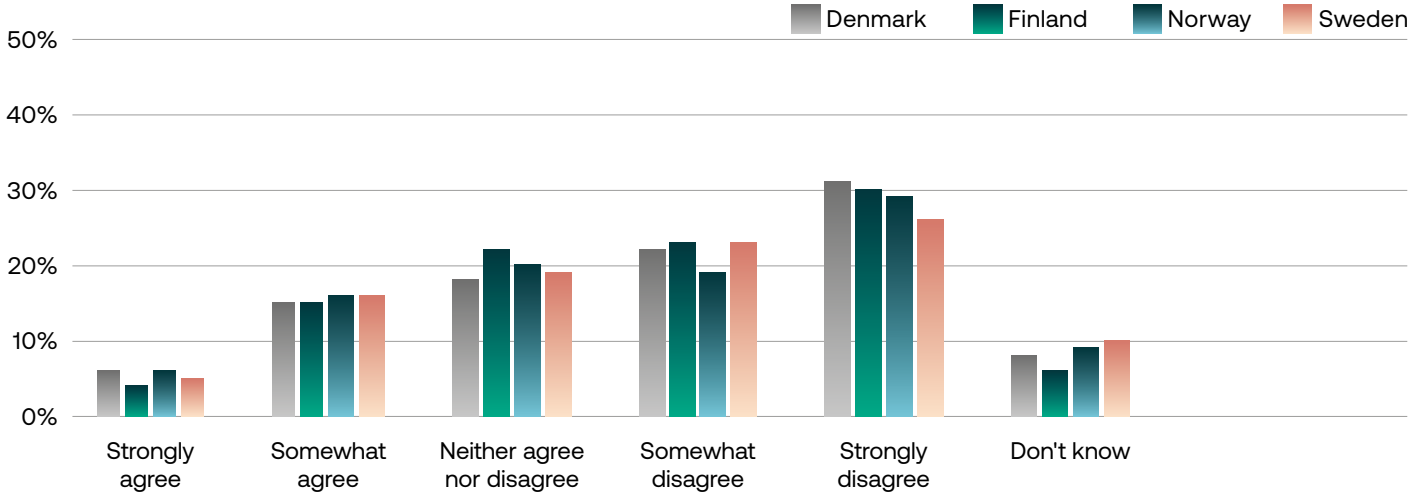

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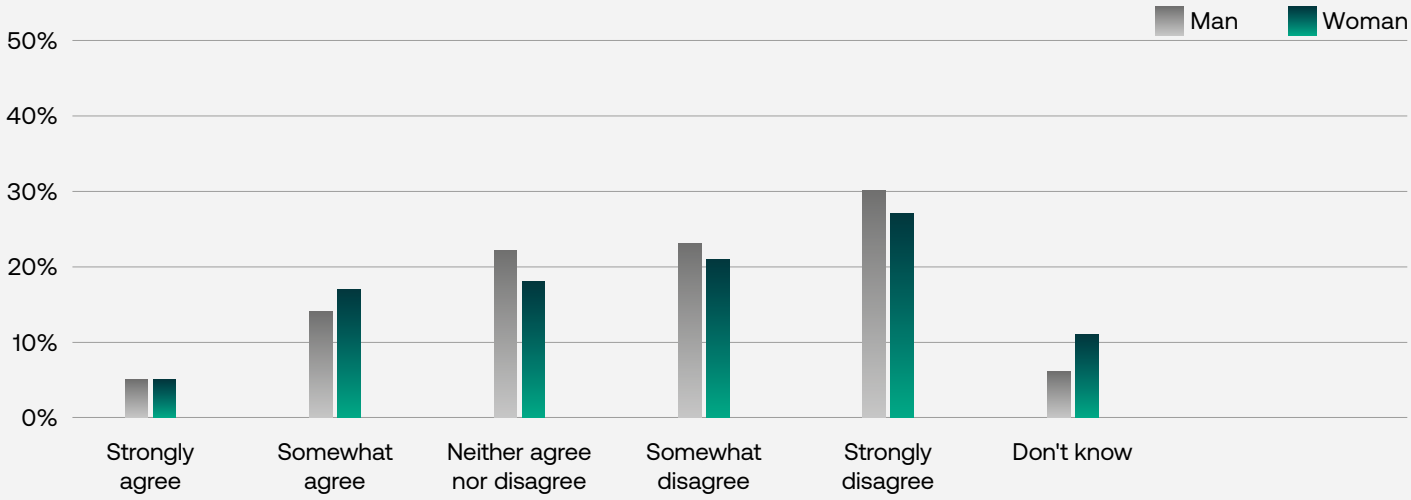

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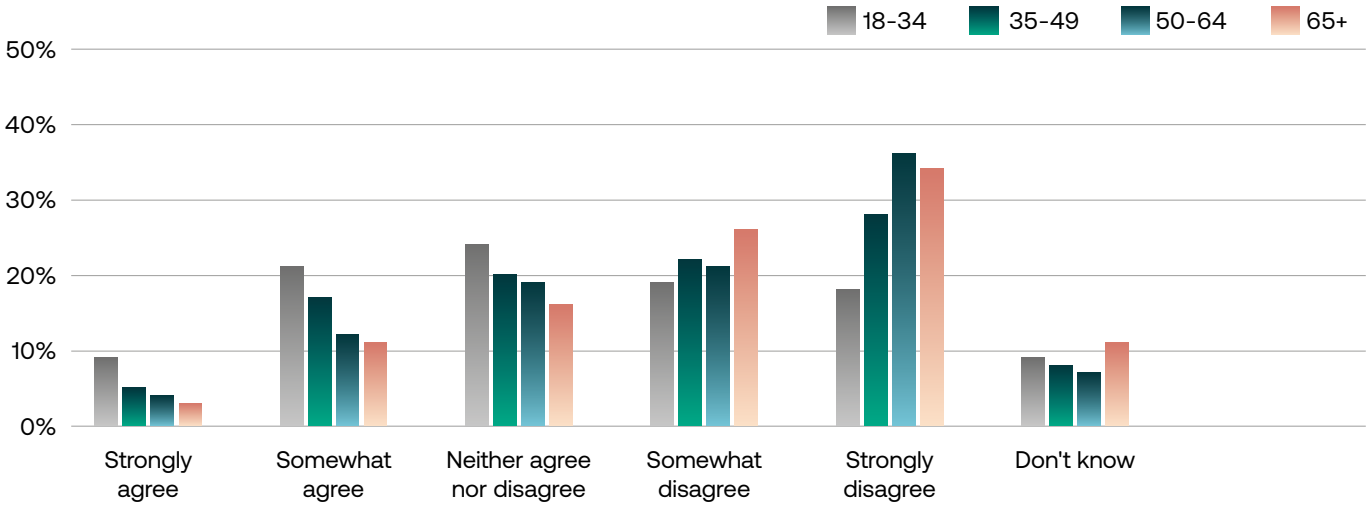
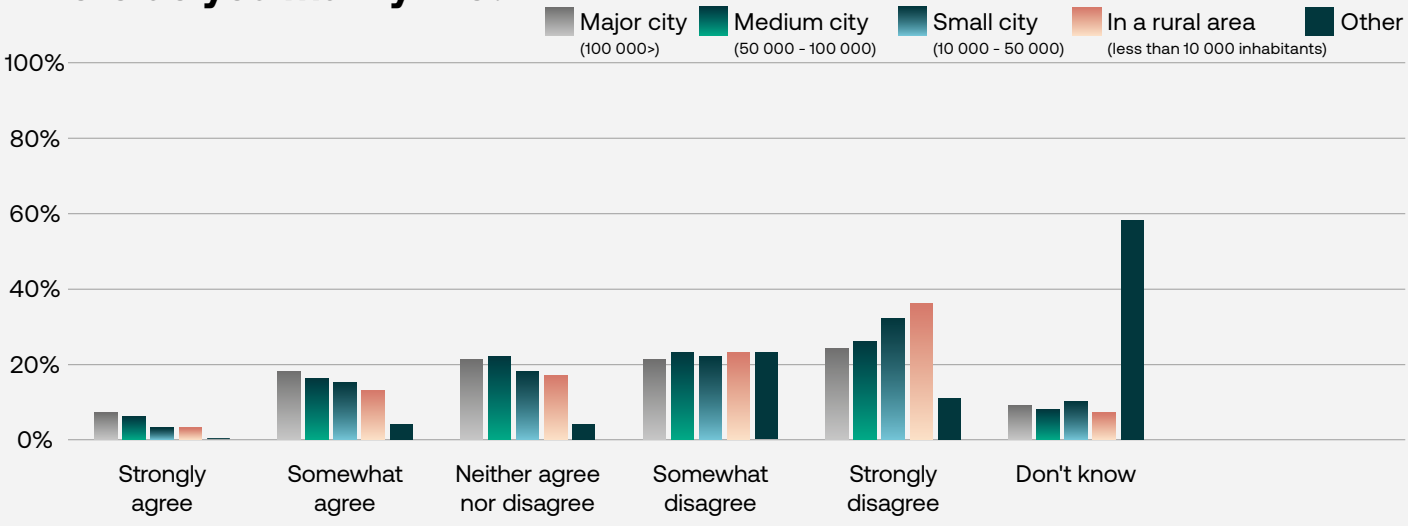
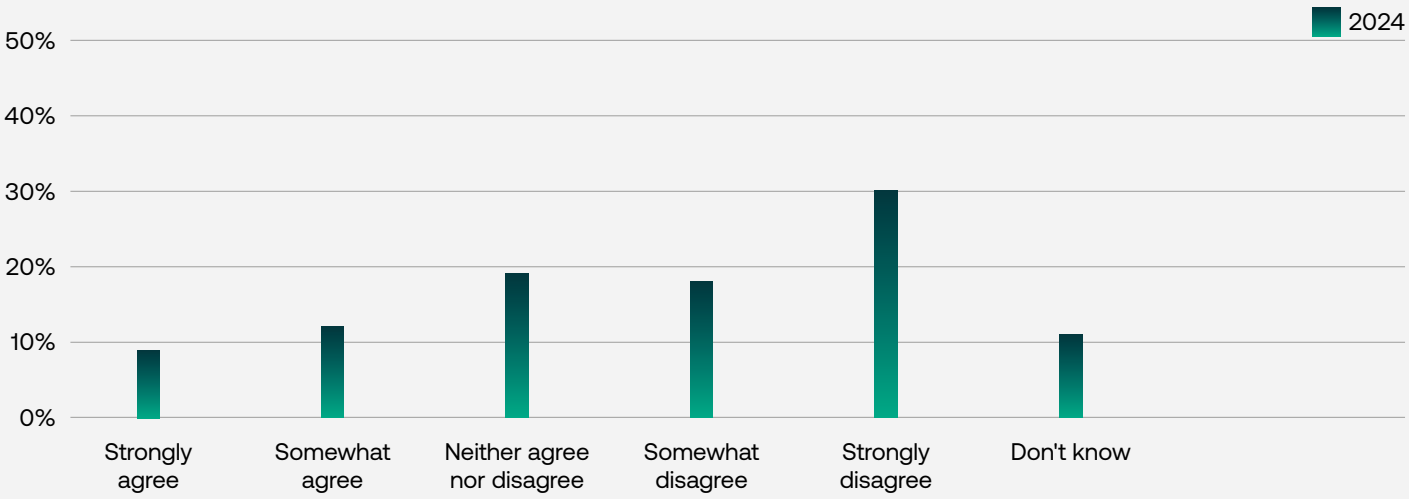


Where do you mainly live?



Sale of new diesel and gasoline cars should be banned by 2035.

Total



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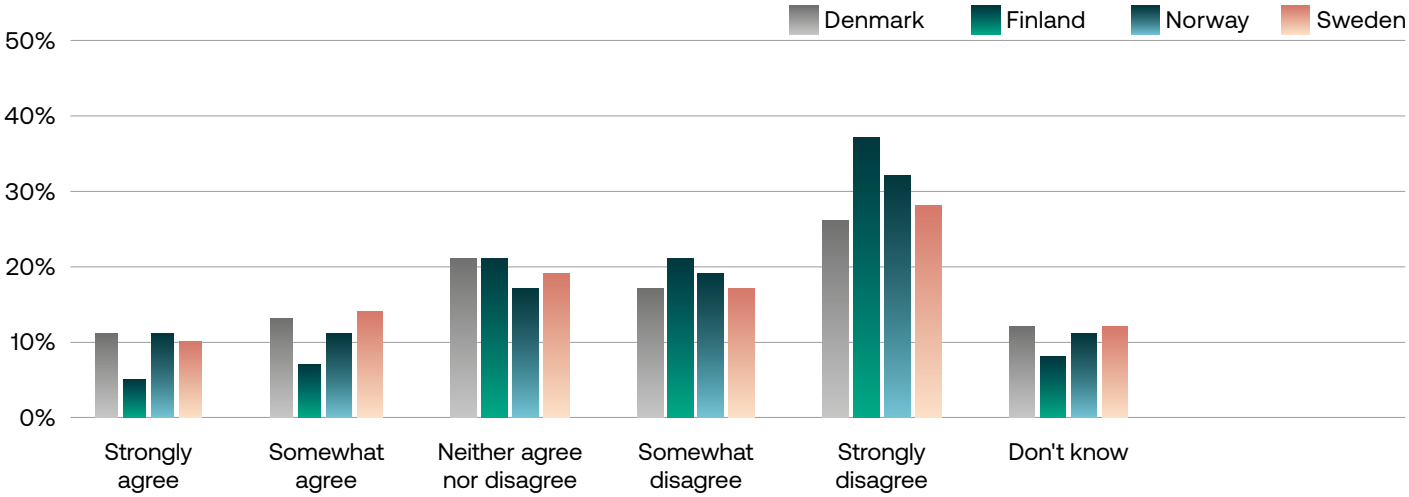

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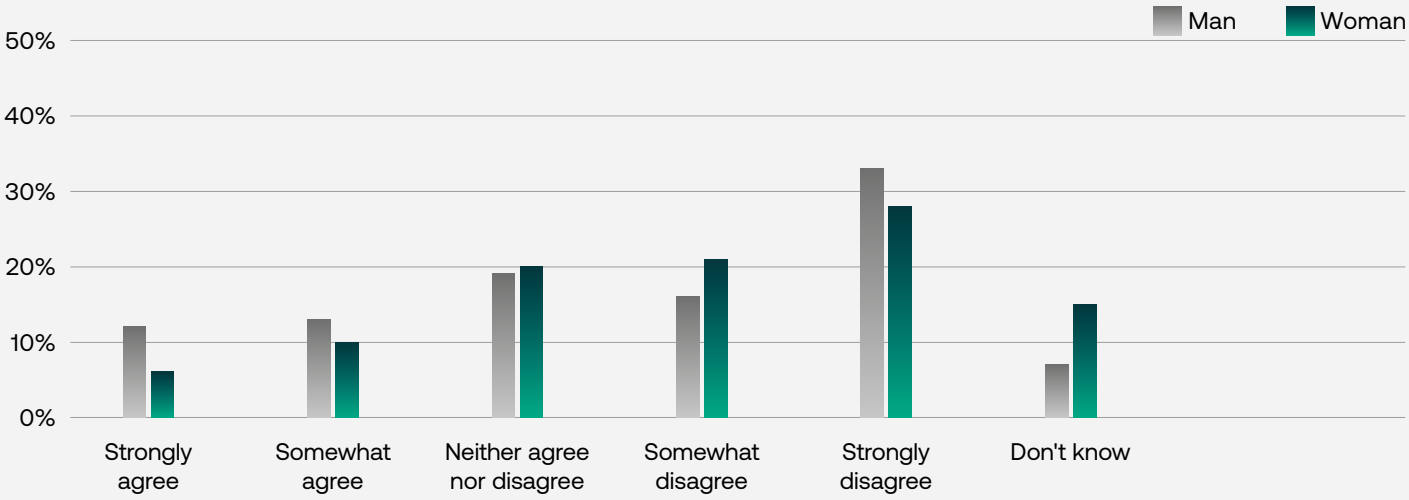

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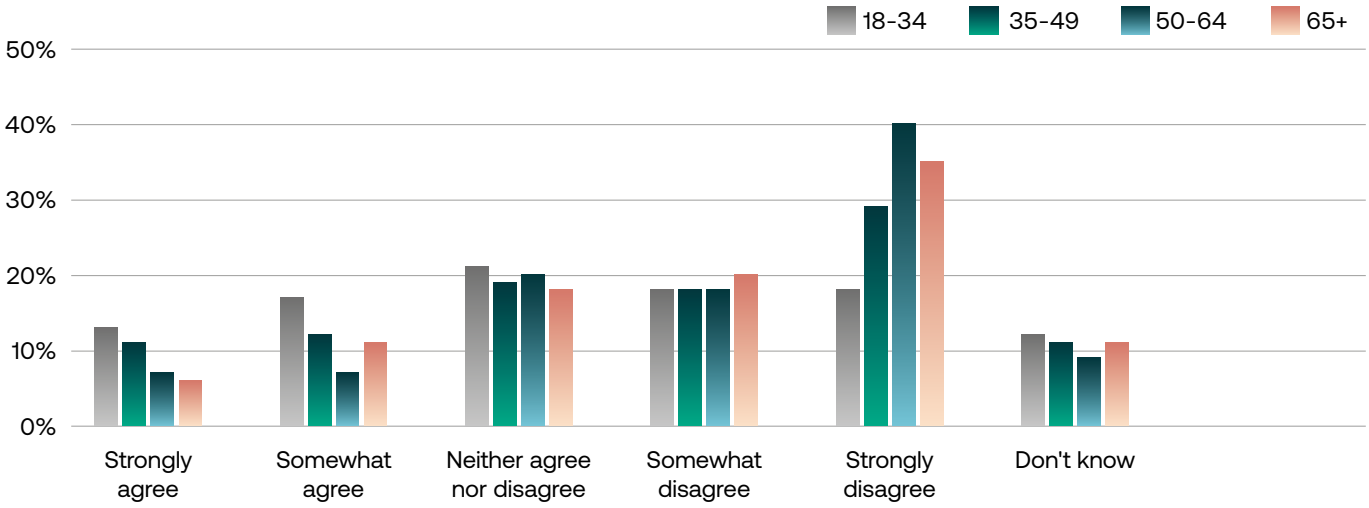
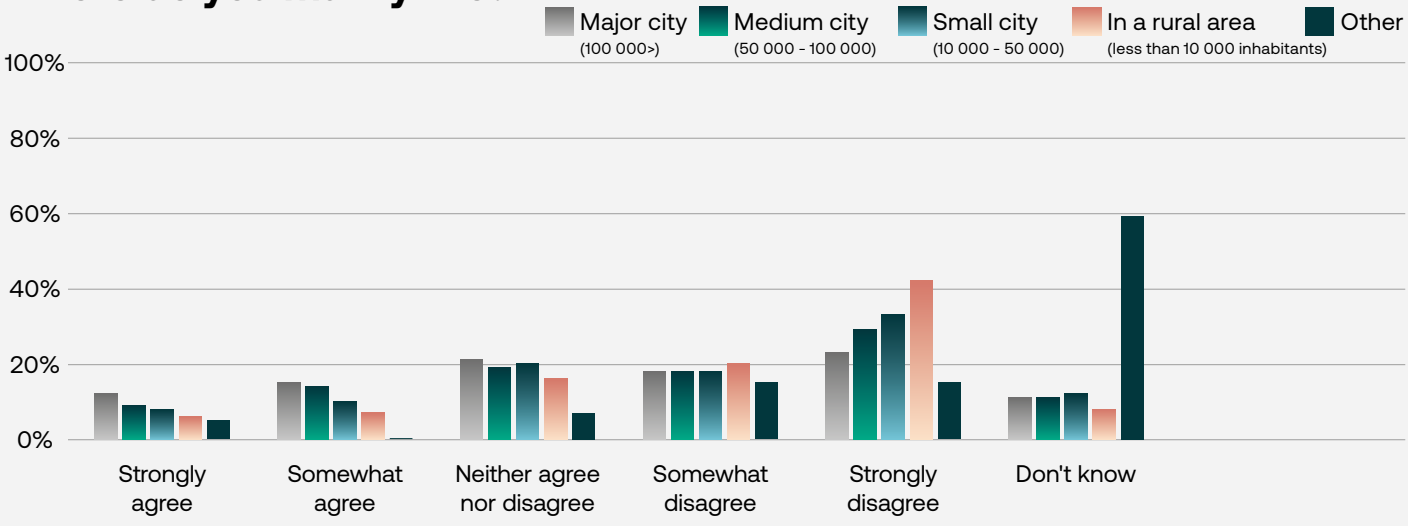
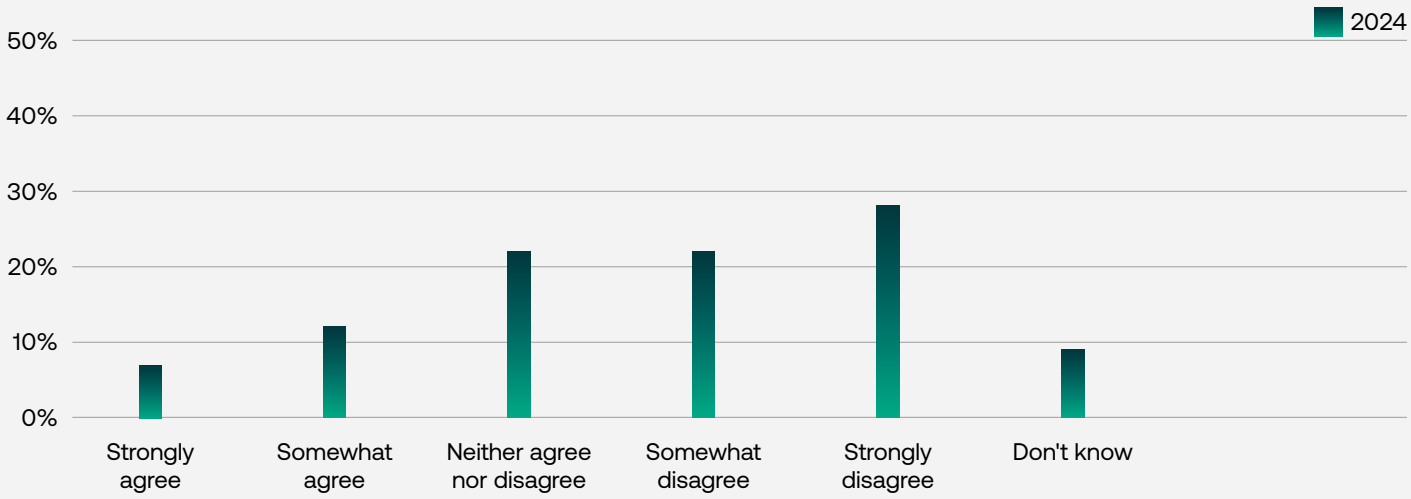


Where do you mainly live?



Cars that run on diesel or gasoline should not be allowed in city centers.

Total



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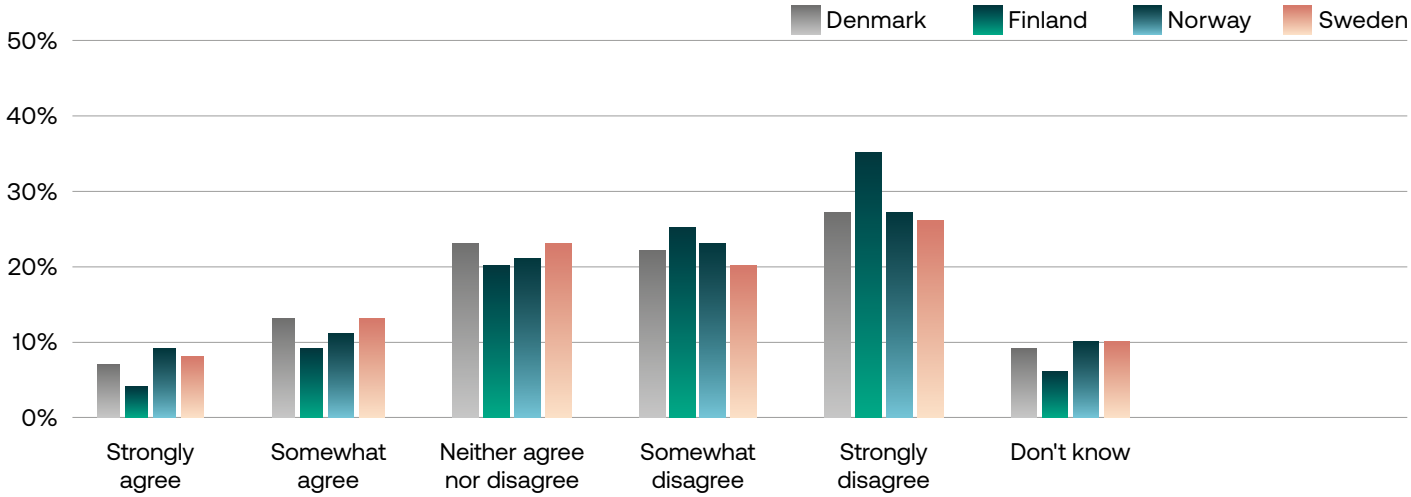

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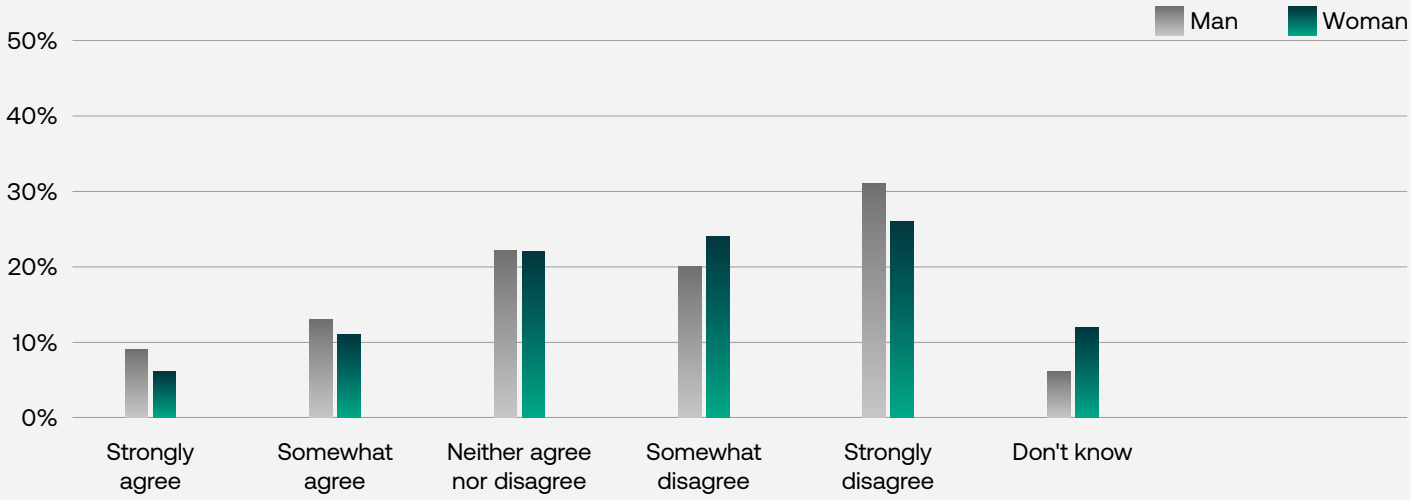

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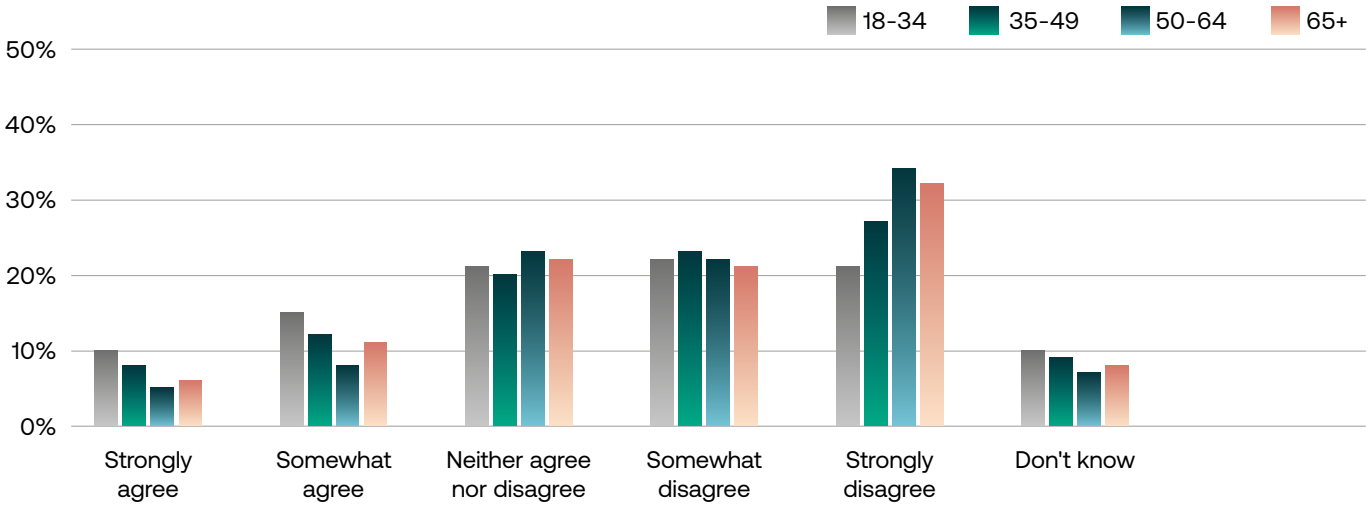
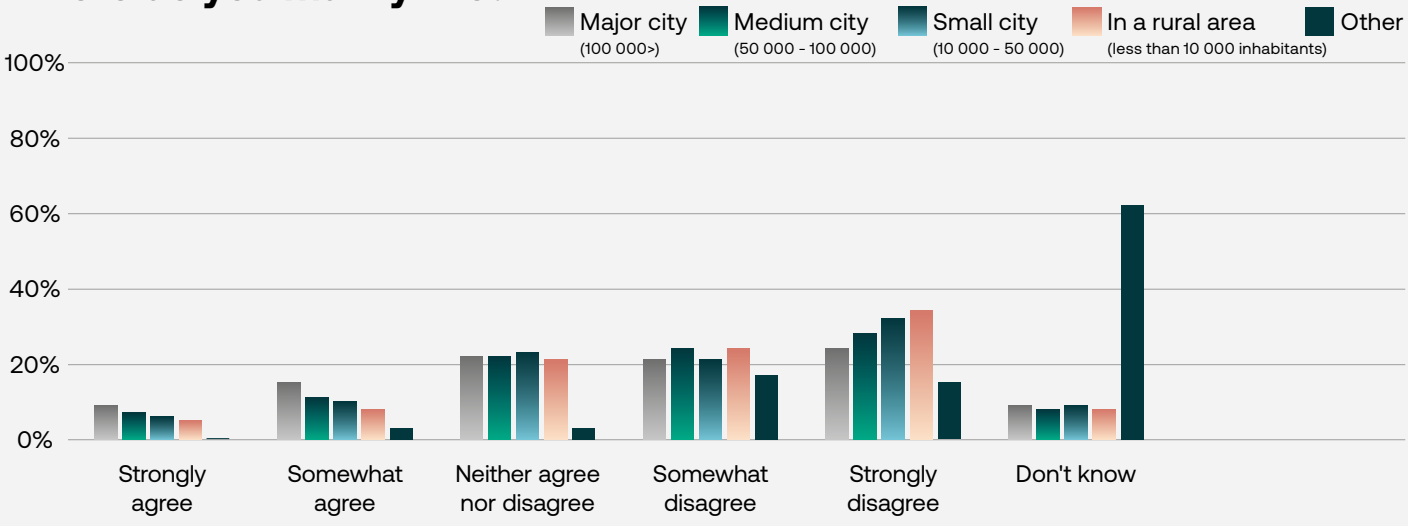
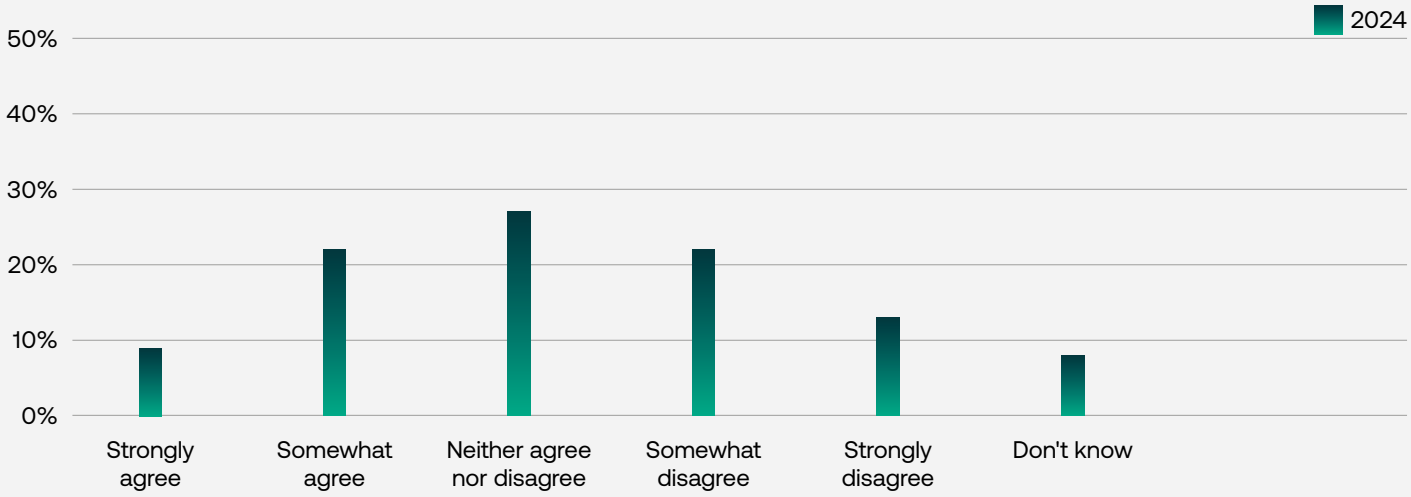


Where do you mainly live?



Electric cars are only for rich people.

Total



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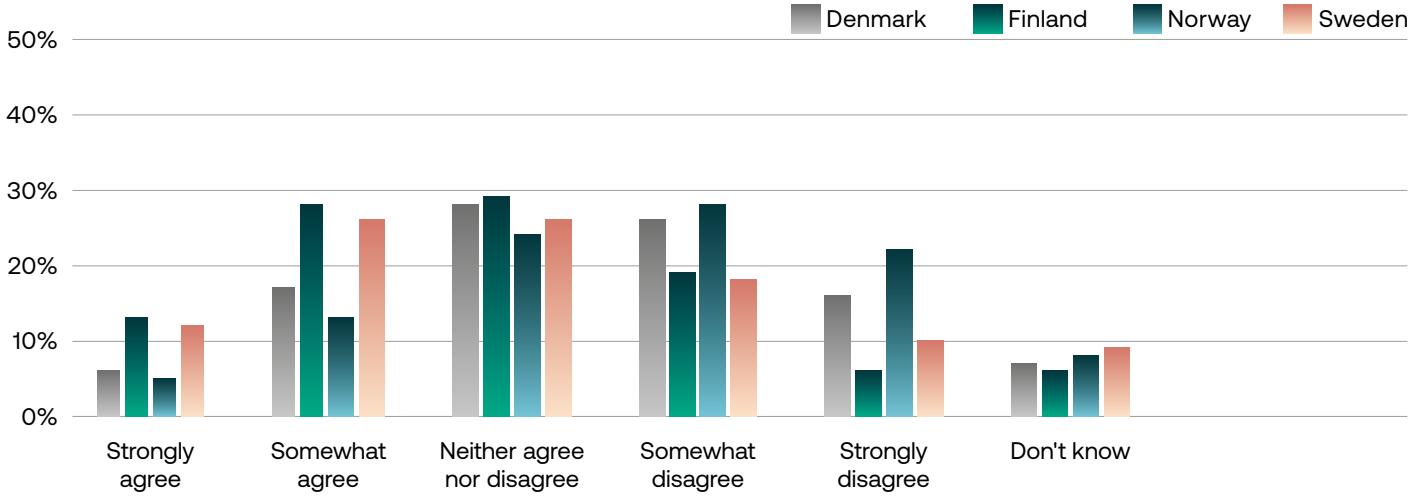

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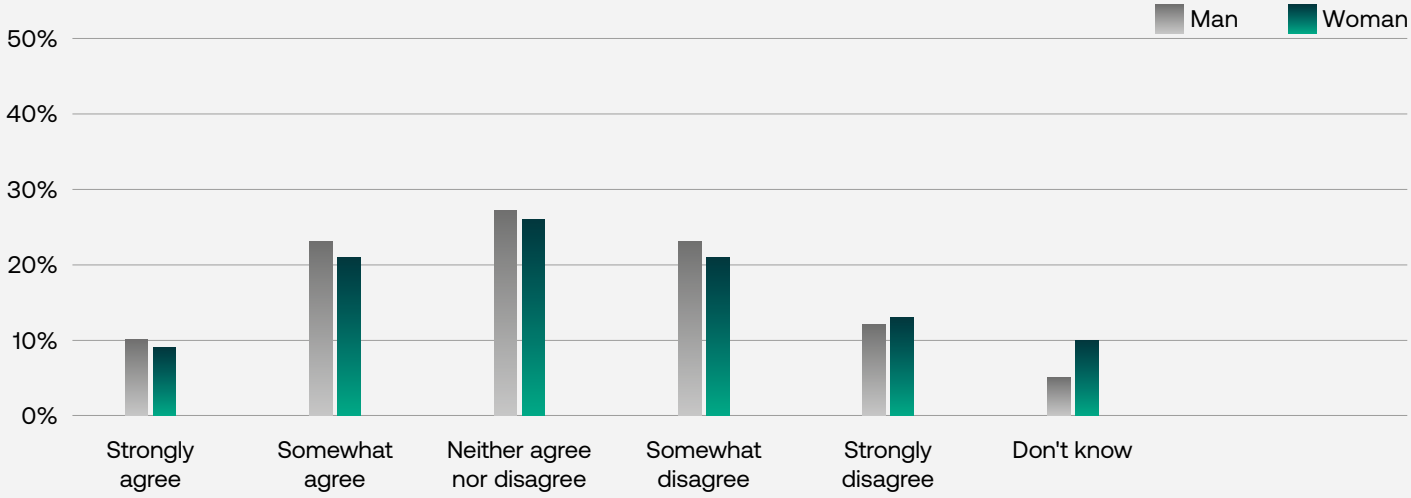

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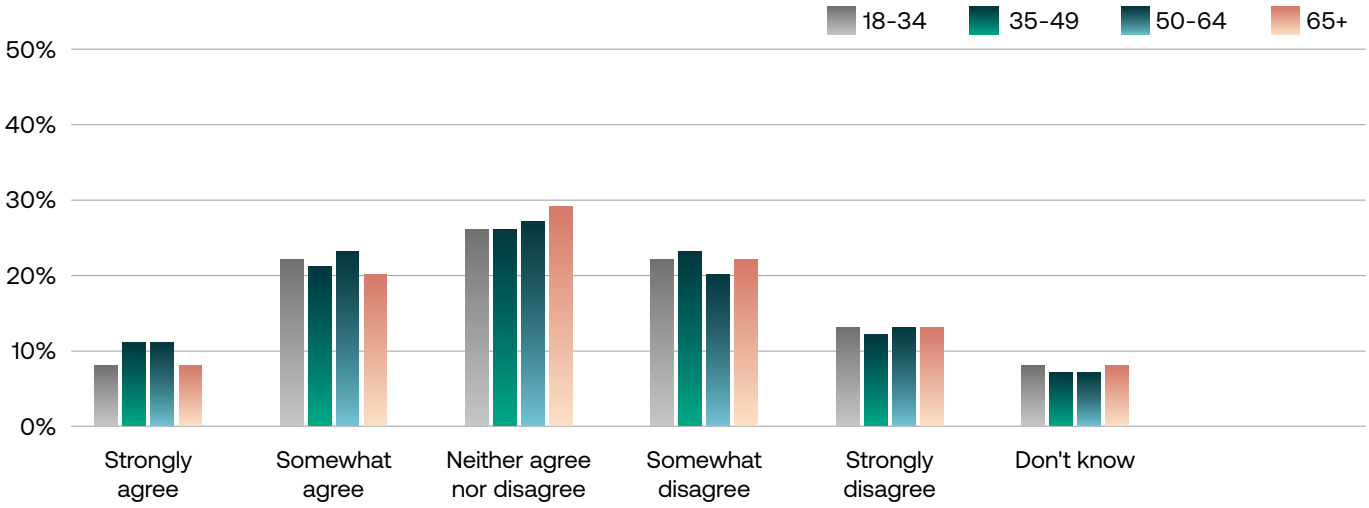
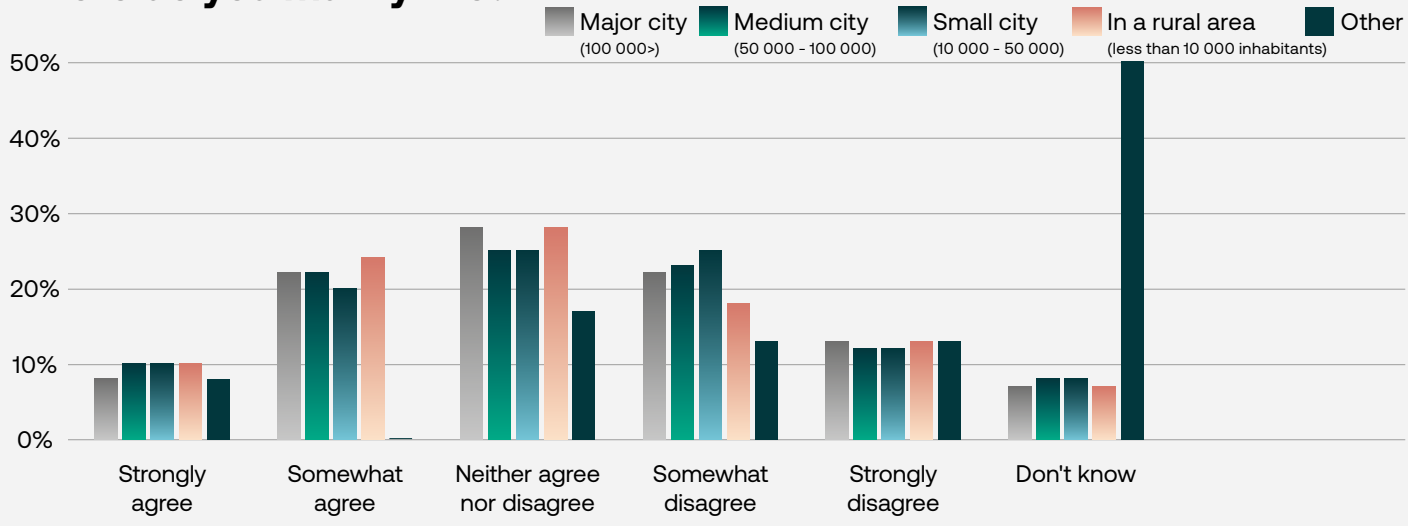
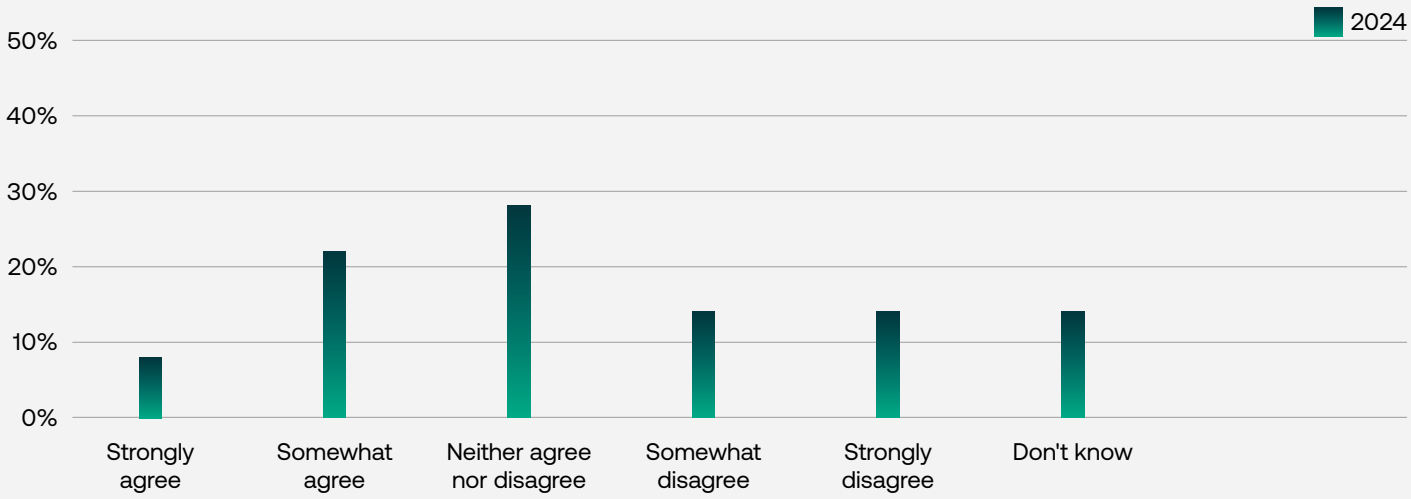


Where do you mainly live?



The green revolution will not happen without a shift to electric cars.

Total



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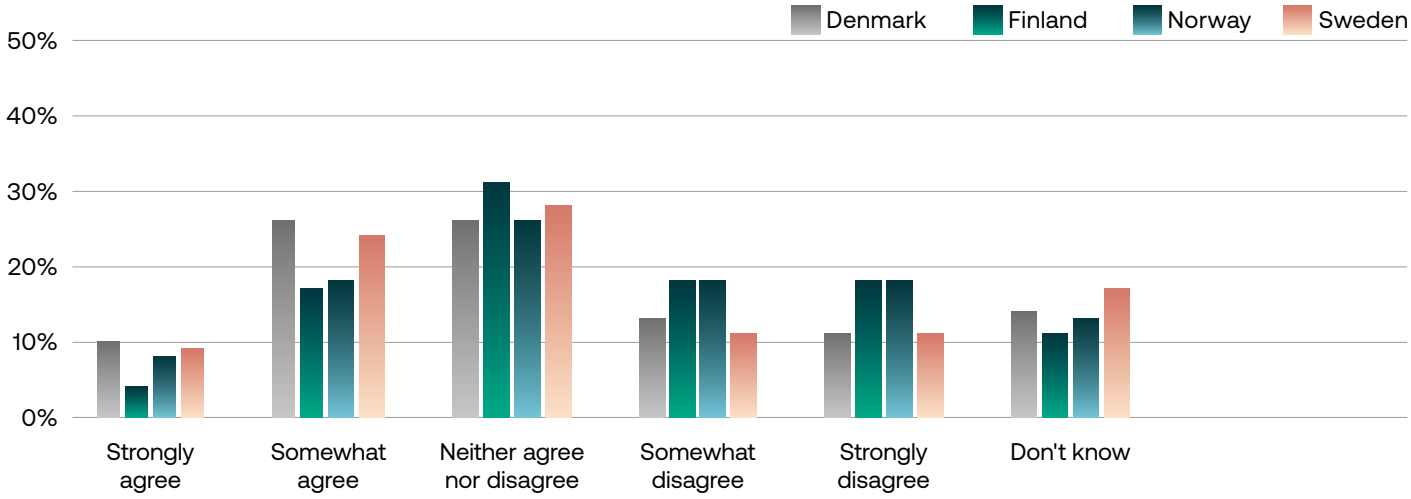

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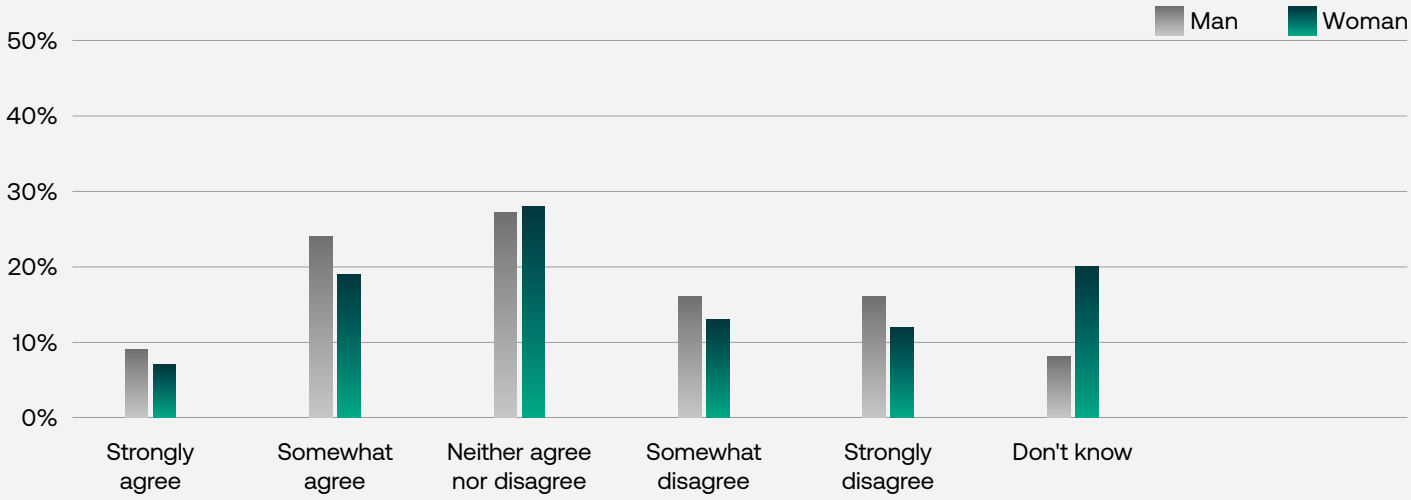

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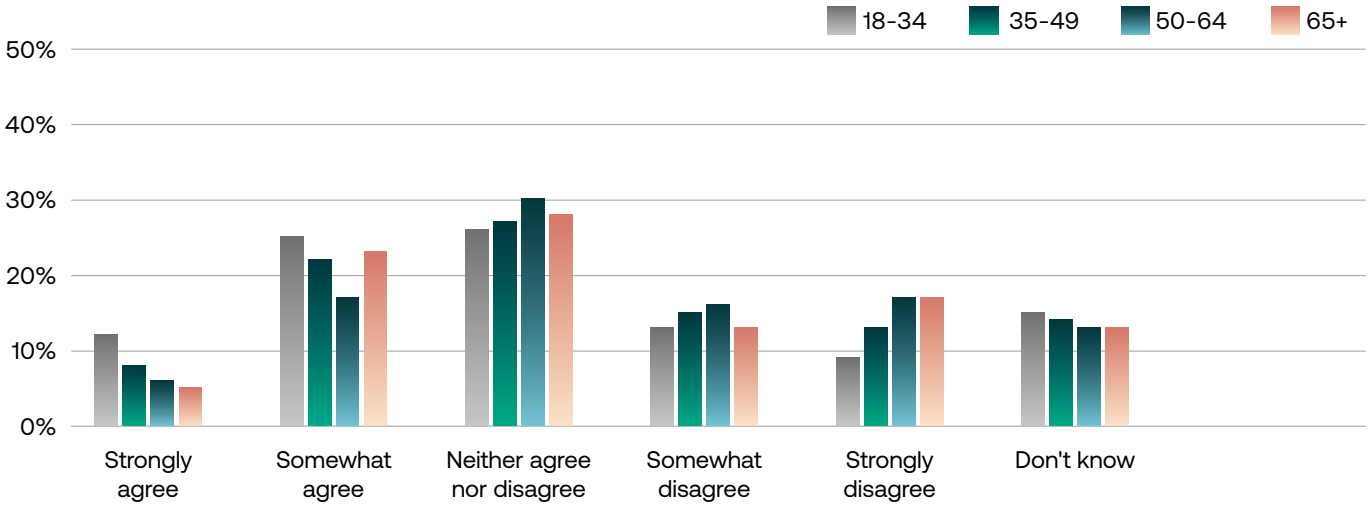
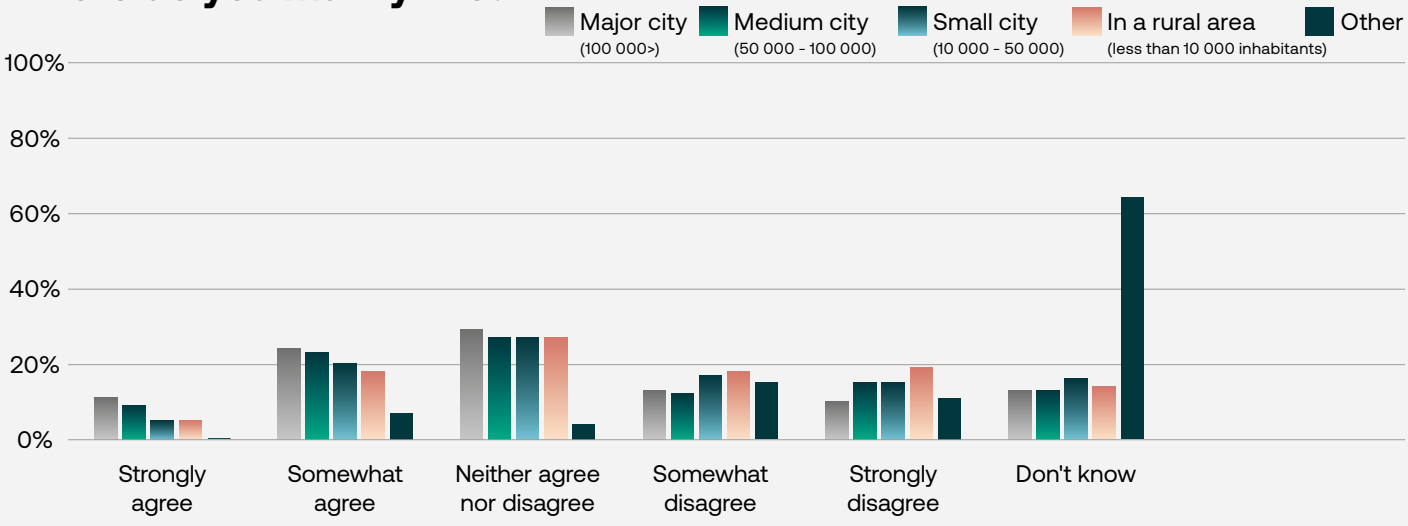
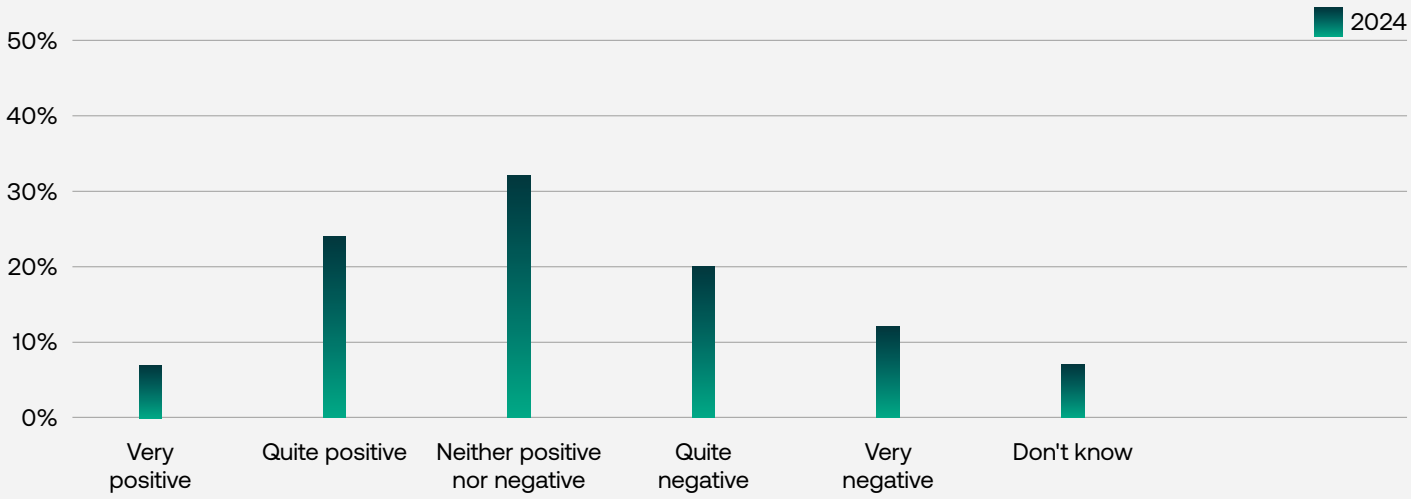


Where do you mainly live?



A shift in technology is currently happening where AI is slowly taking over functions that was earlier handled by the driver. What is your attitude towards this shift?

Total



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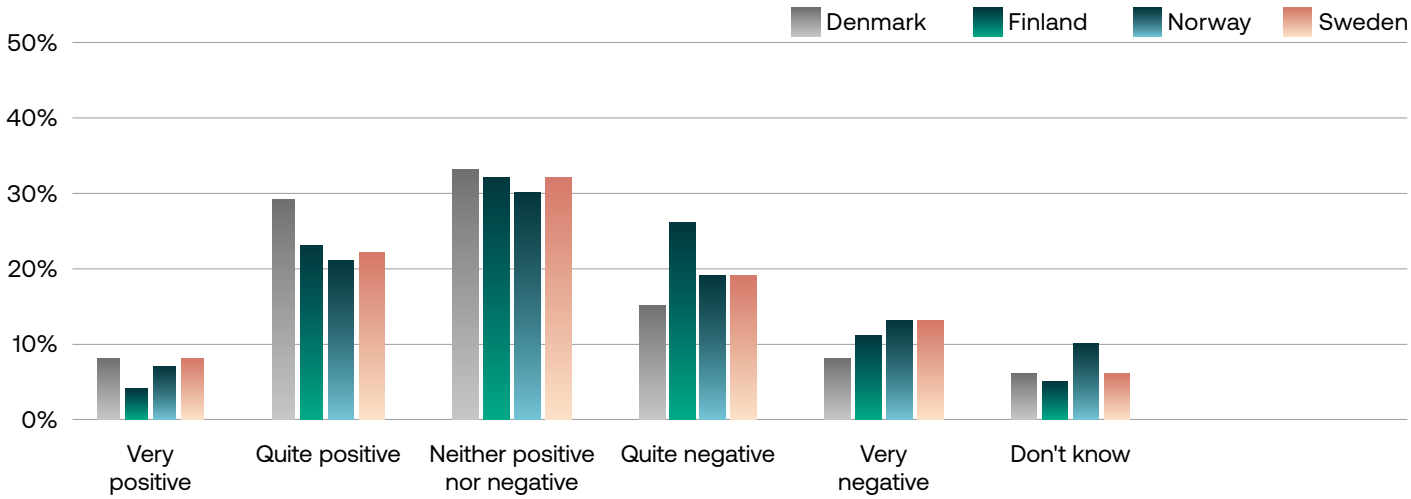

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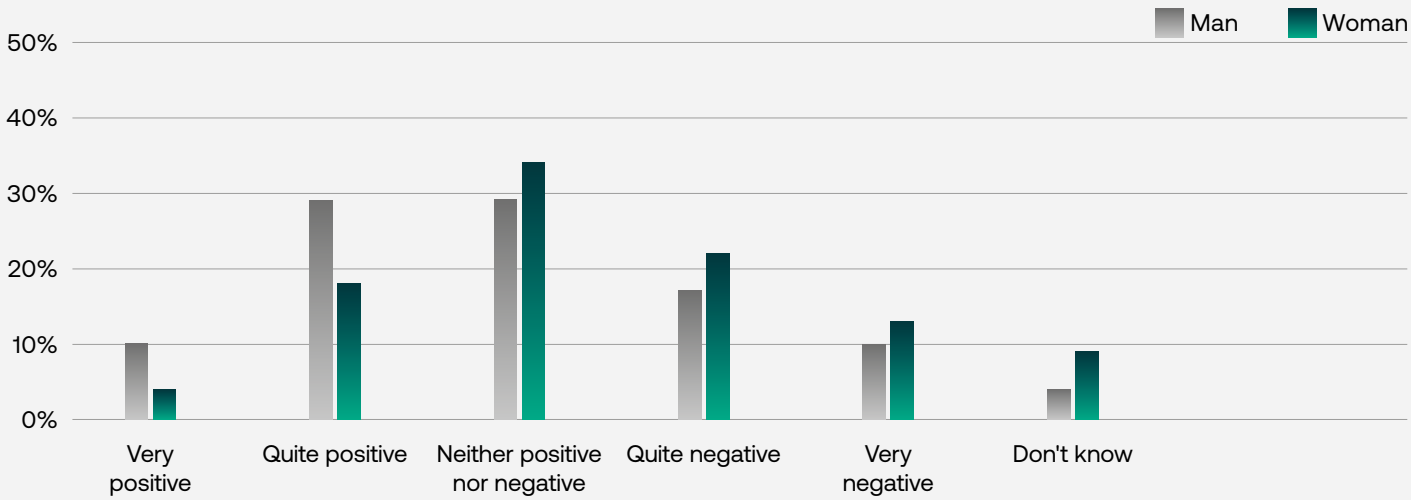

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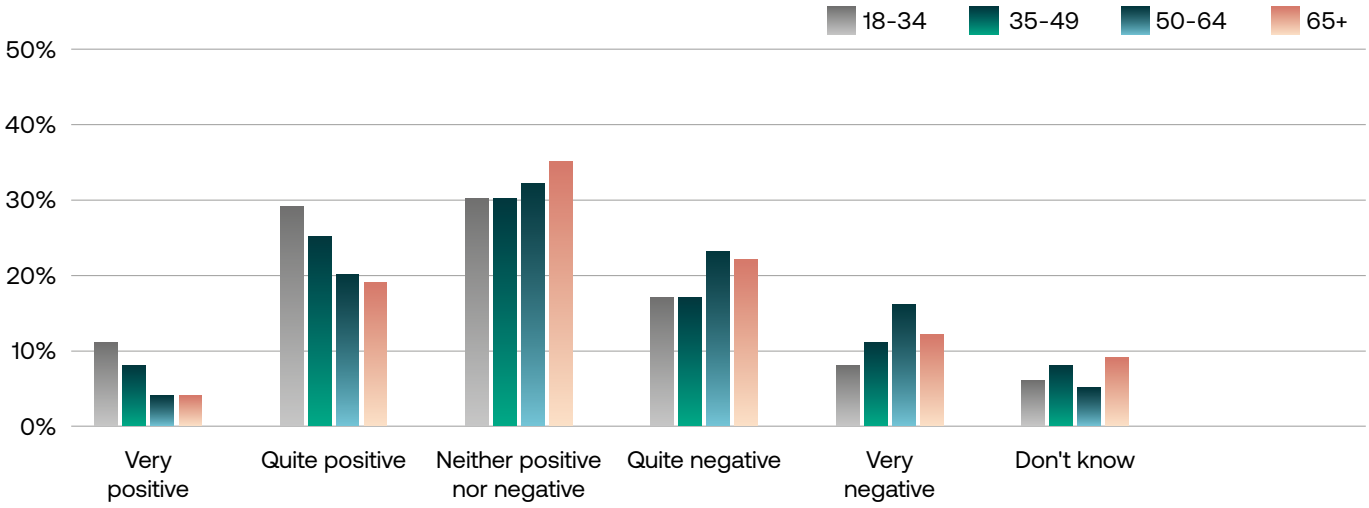
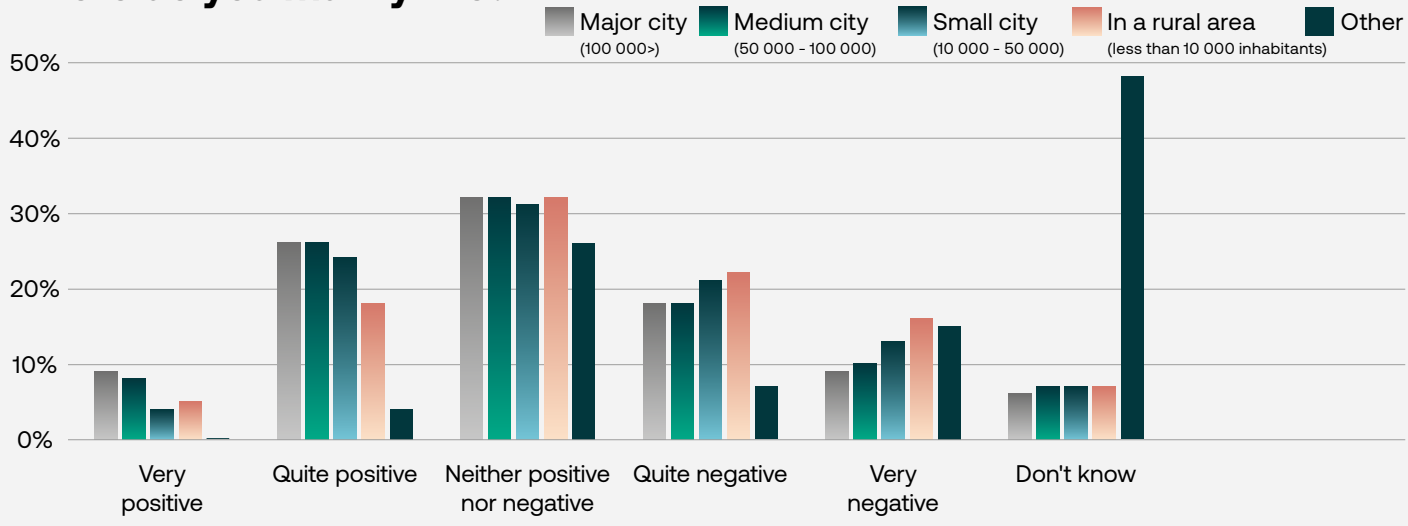
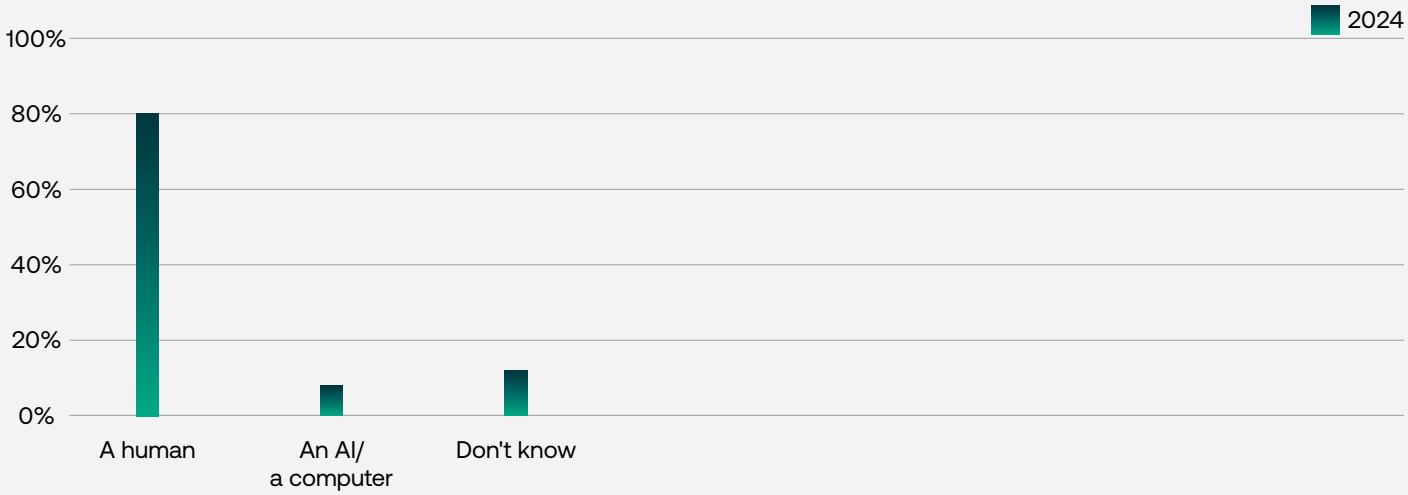


Where do you mainly live?



Who do you trust the most to drive a car?

Total



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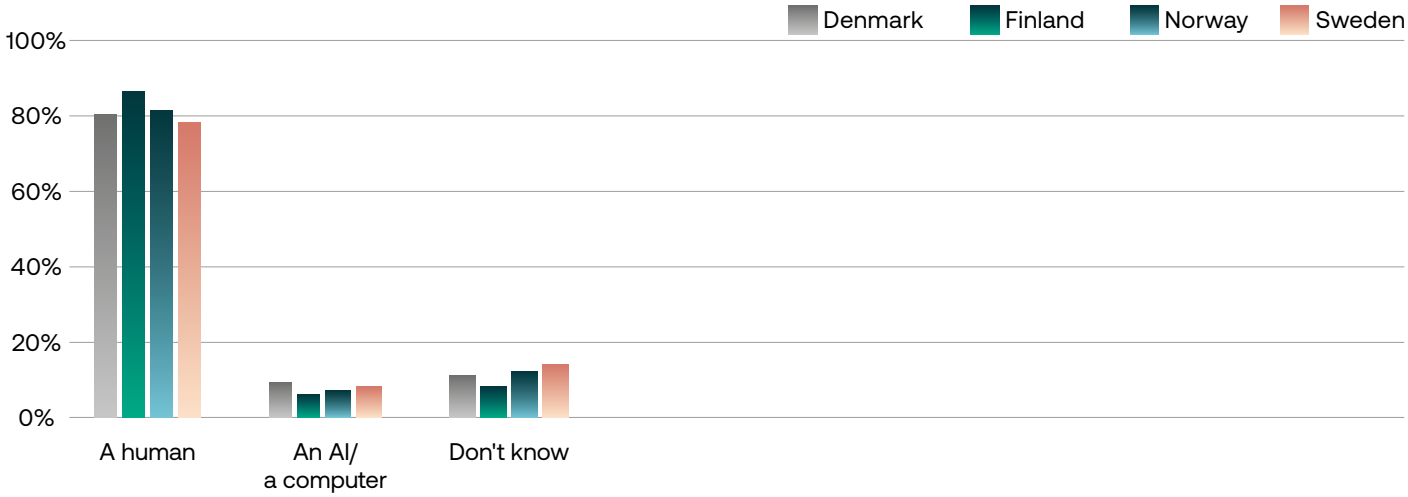

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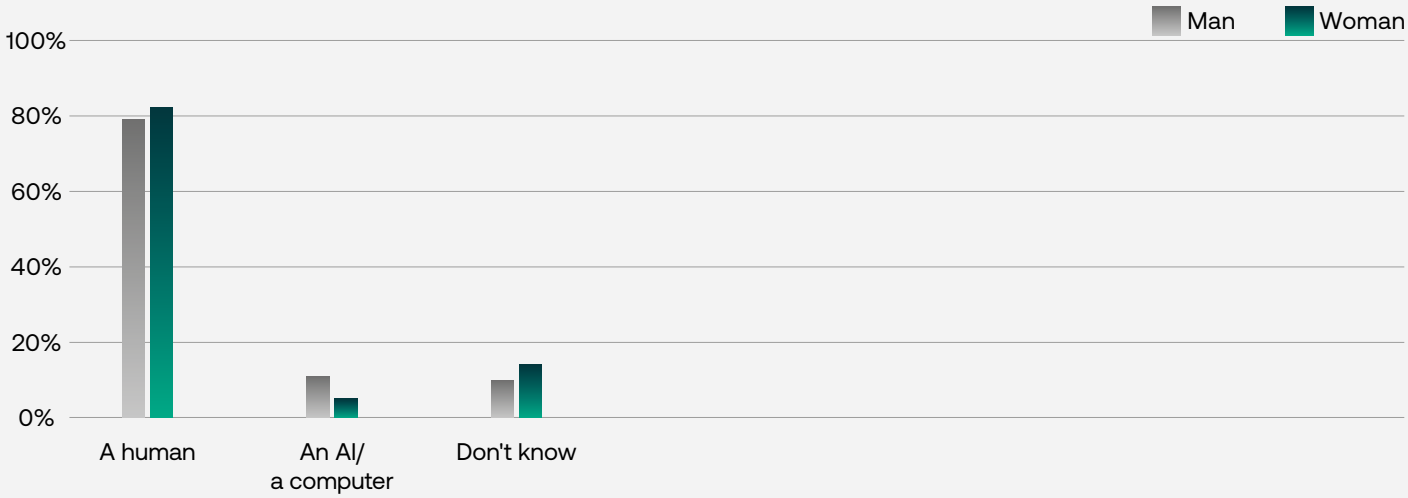

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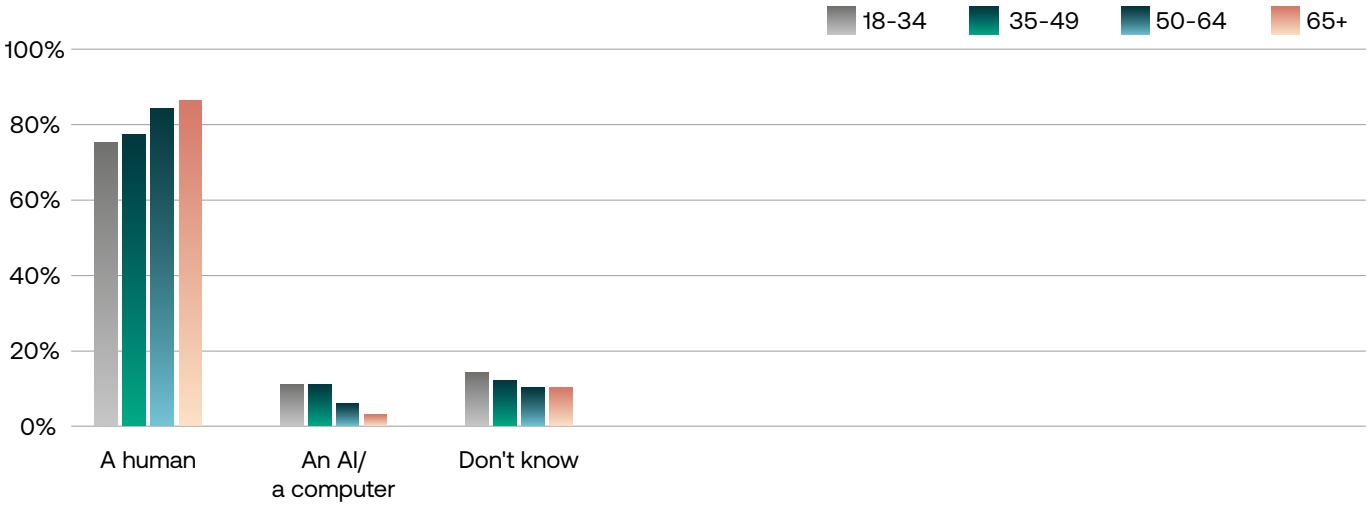
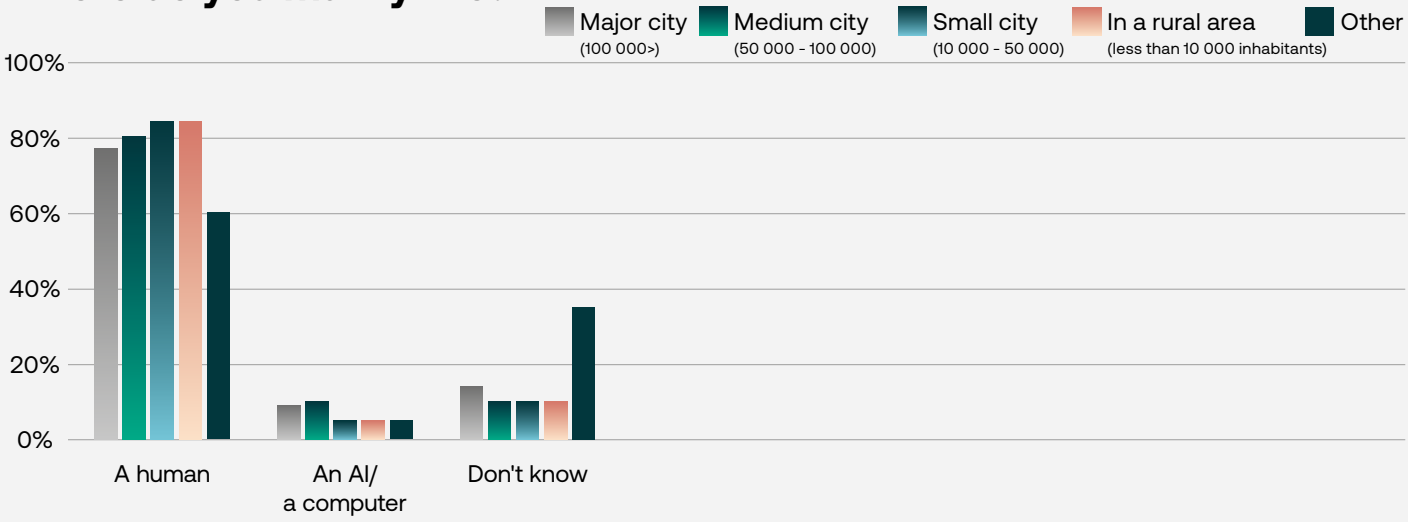
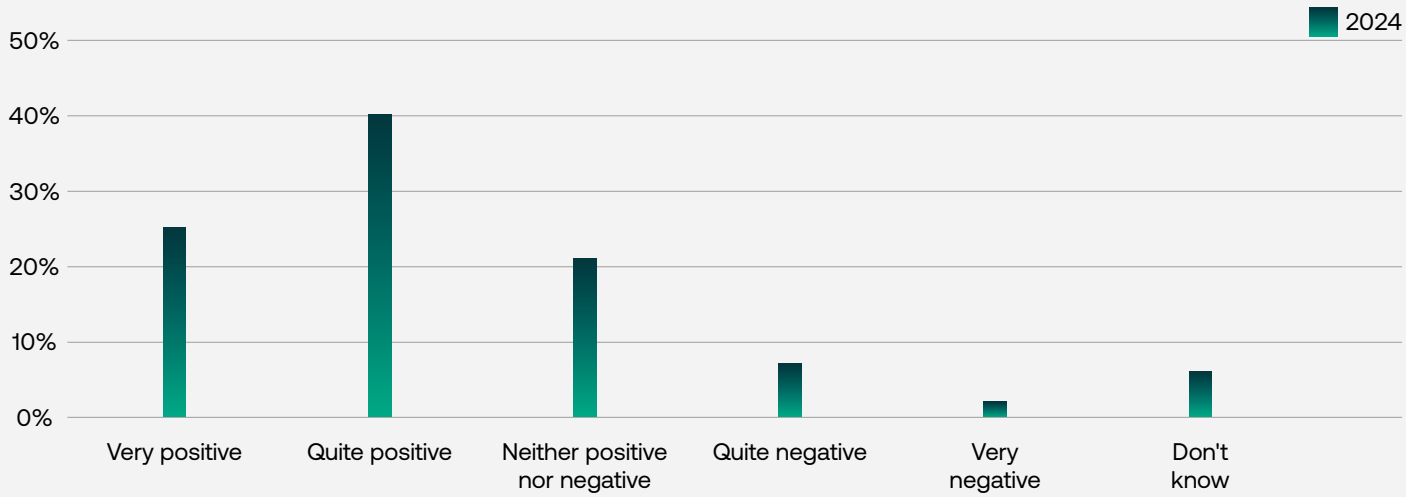


Where do you mainly live?



What is your attitude towards car workshops reusing recycled spare parts with the same quality as new ones, during service and repair?

Total



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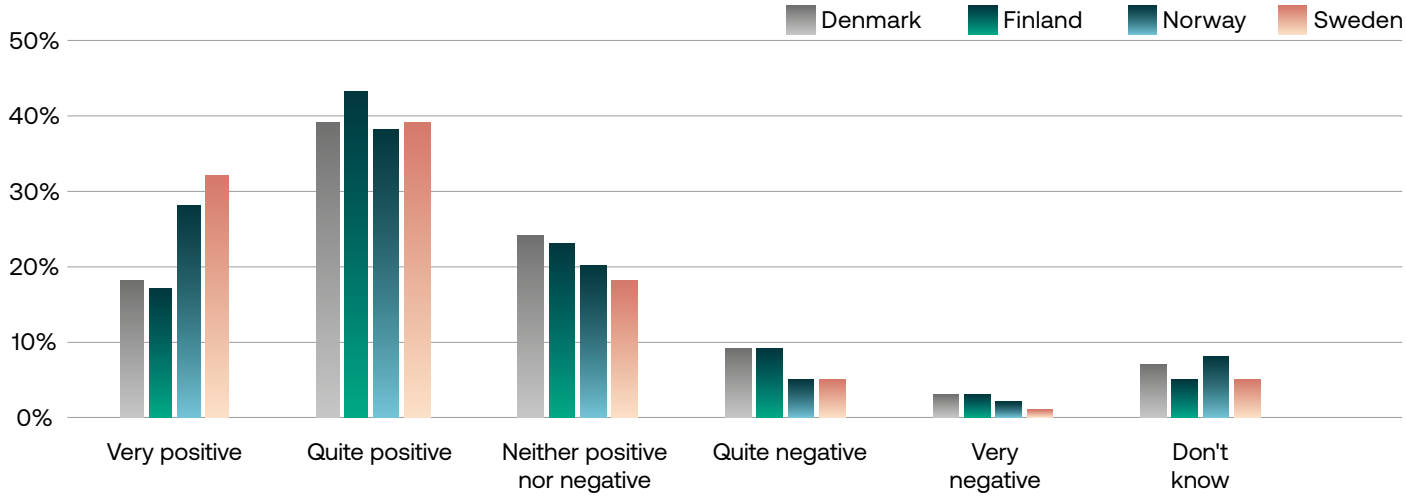
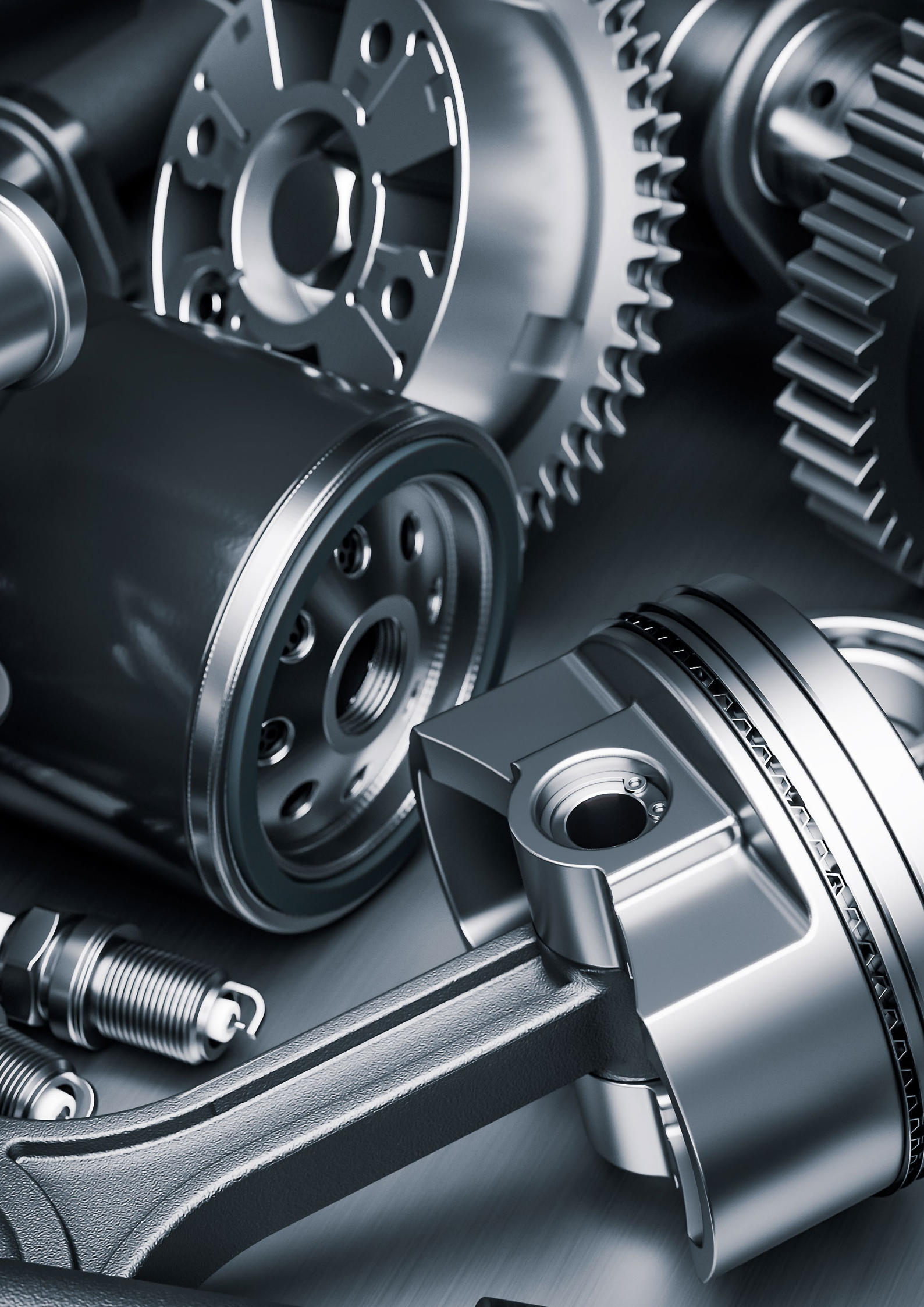
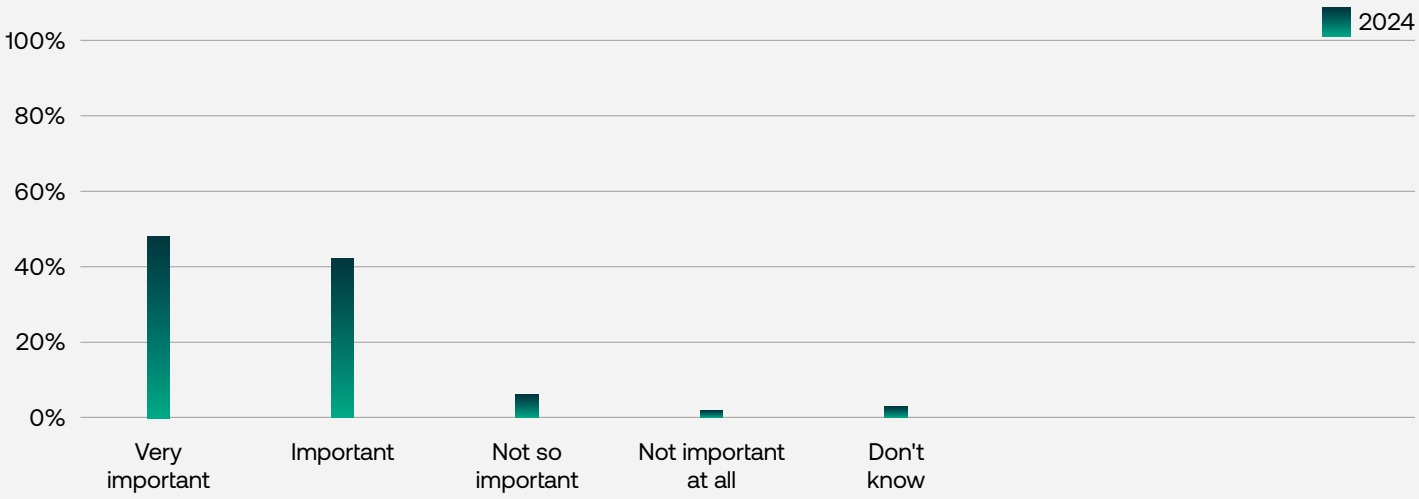




How important is it to you that you can repair and service your car to increase its maximum life span?

Total



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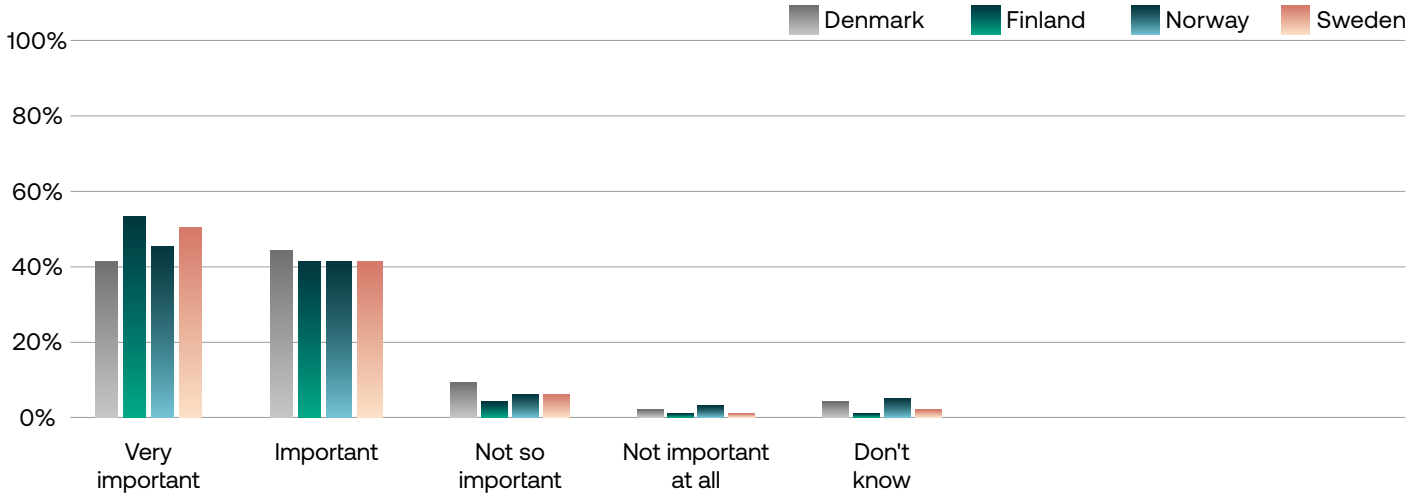

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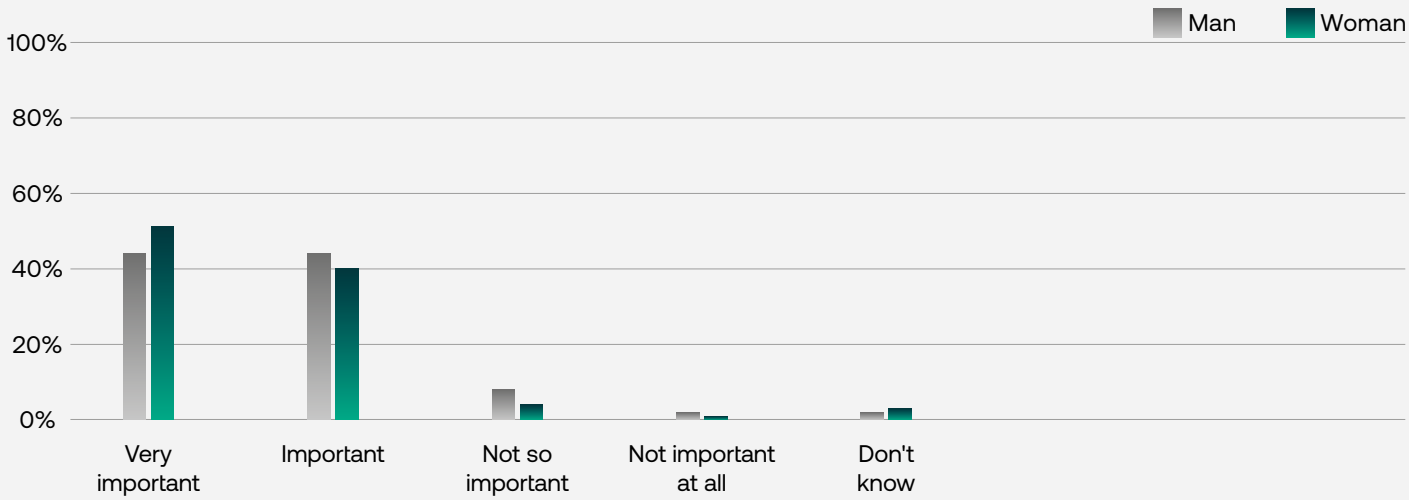

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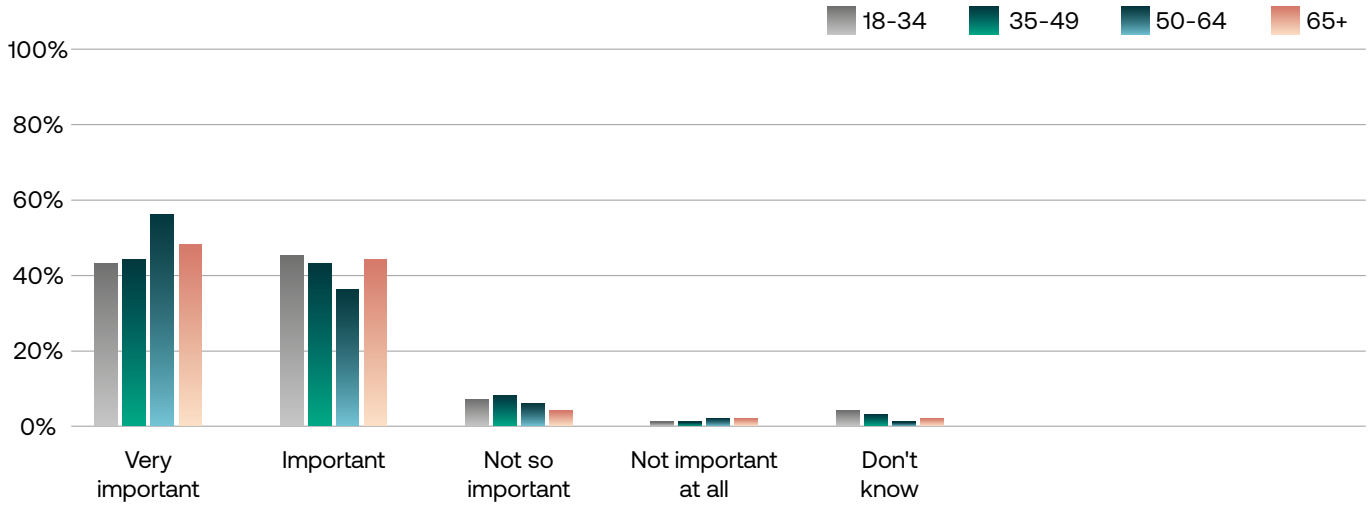
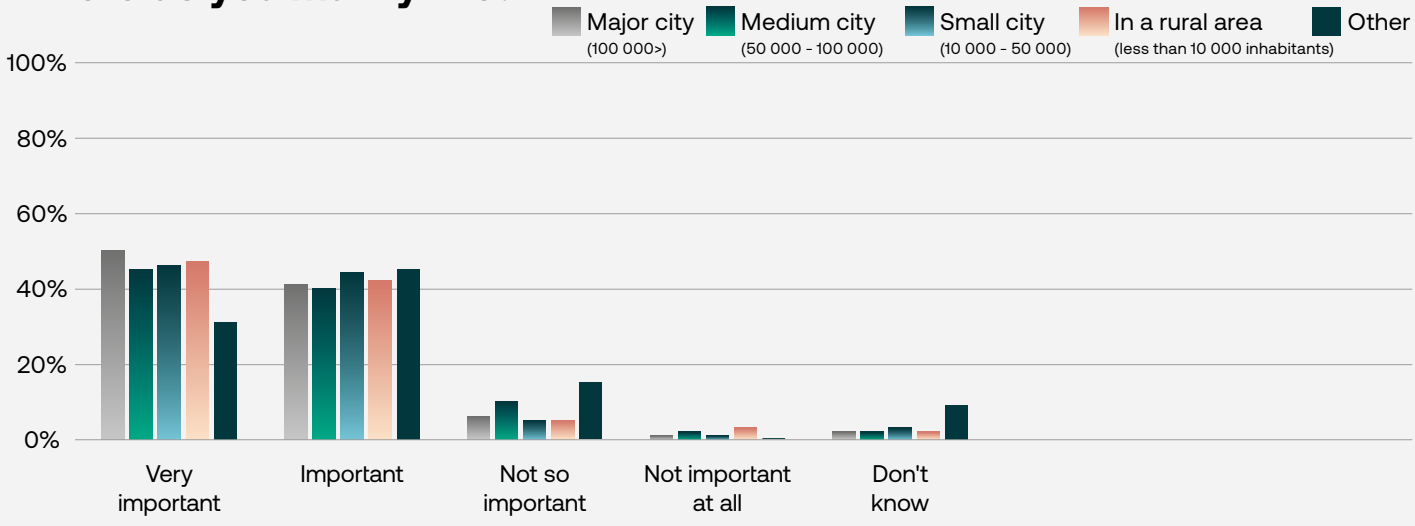
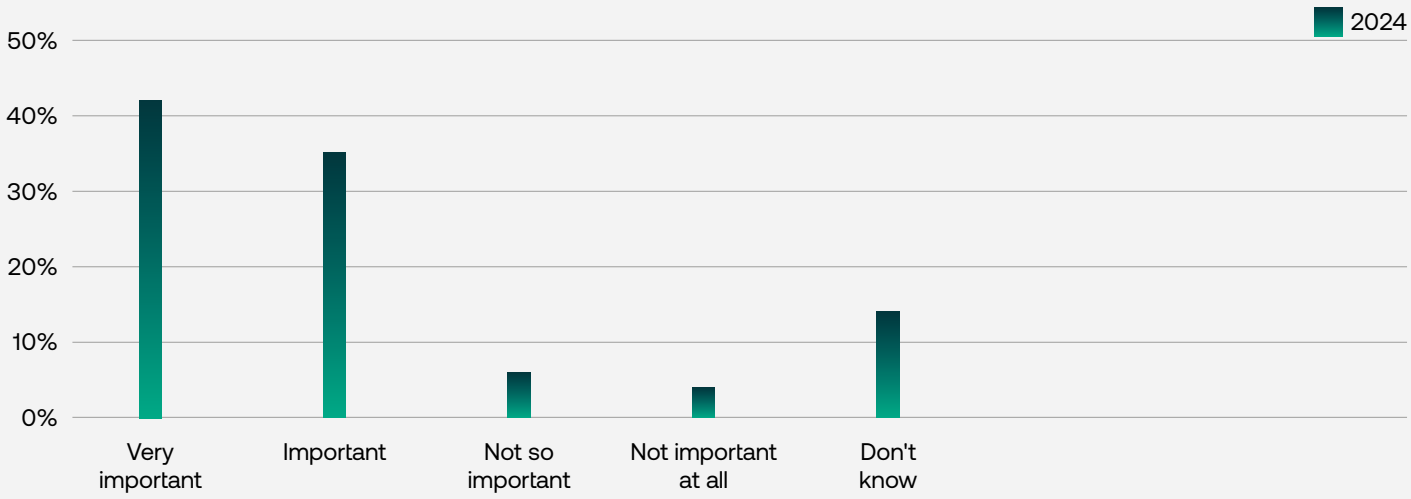


Where do you mainly live?



How important is it to you that electric cars can be repaired and serviced equally as easy as cars with combustion engines?

Total



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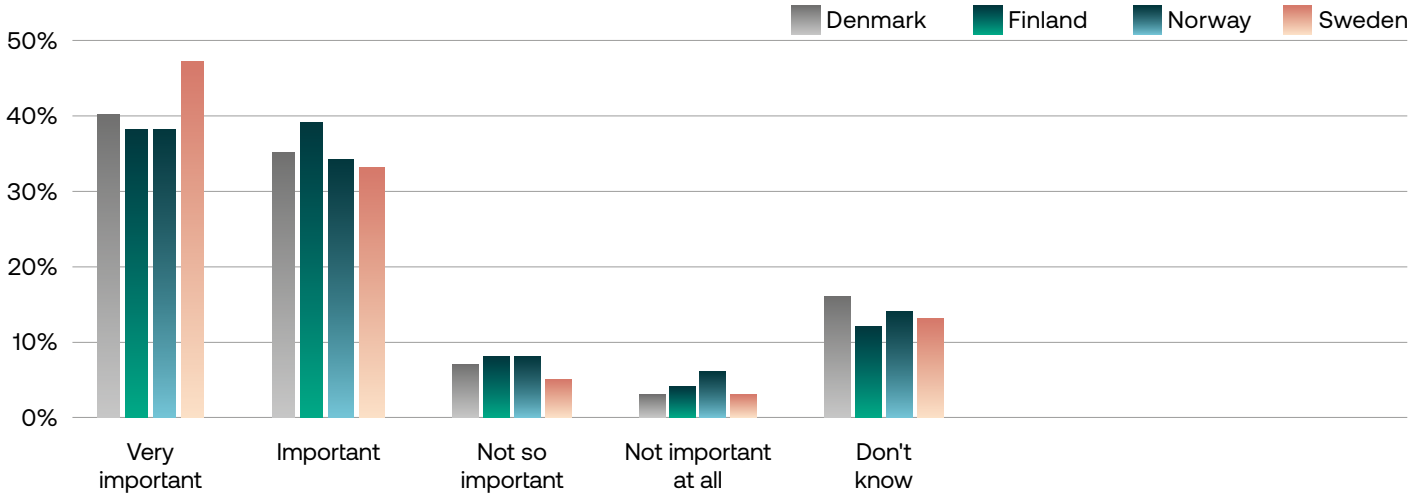
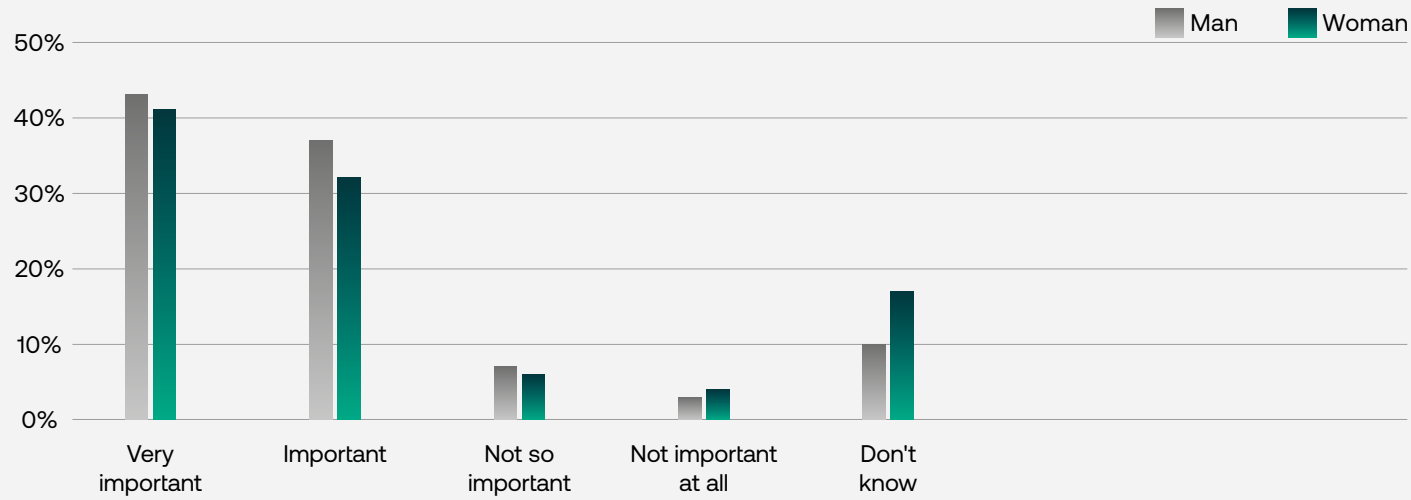


Gender



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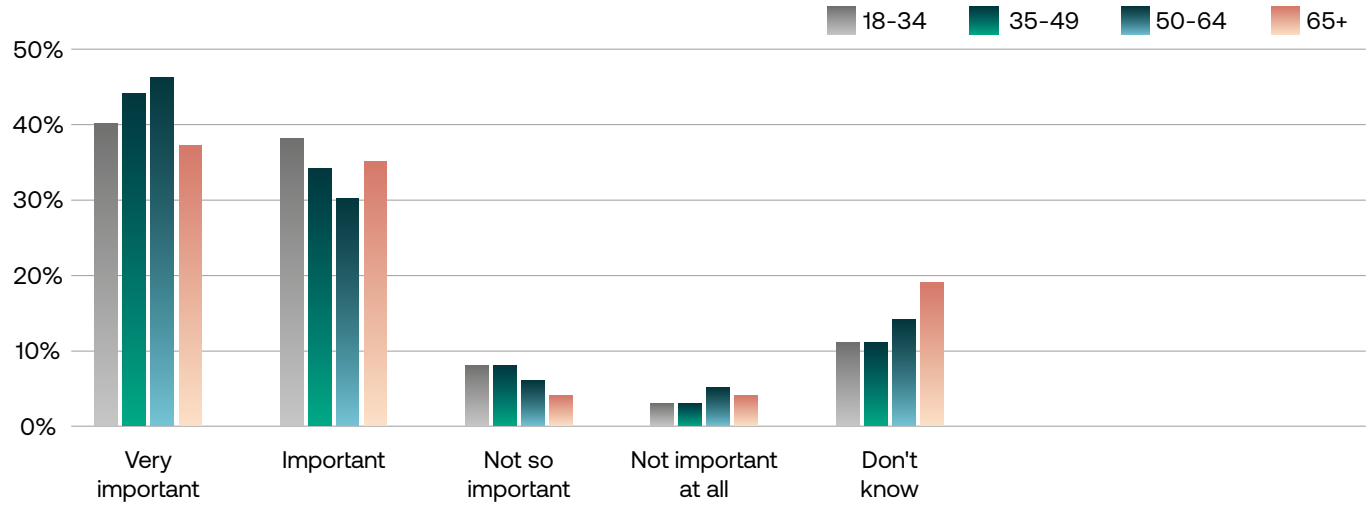
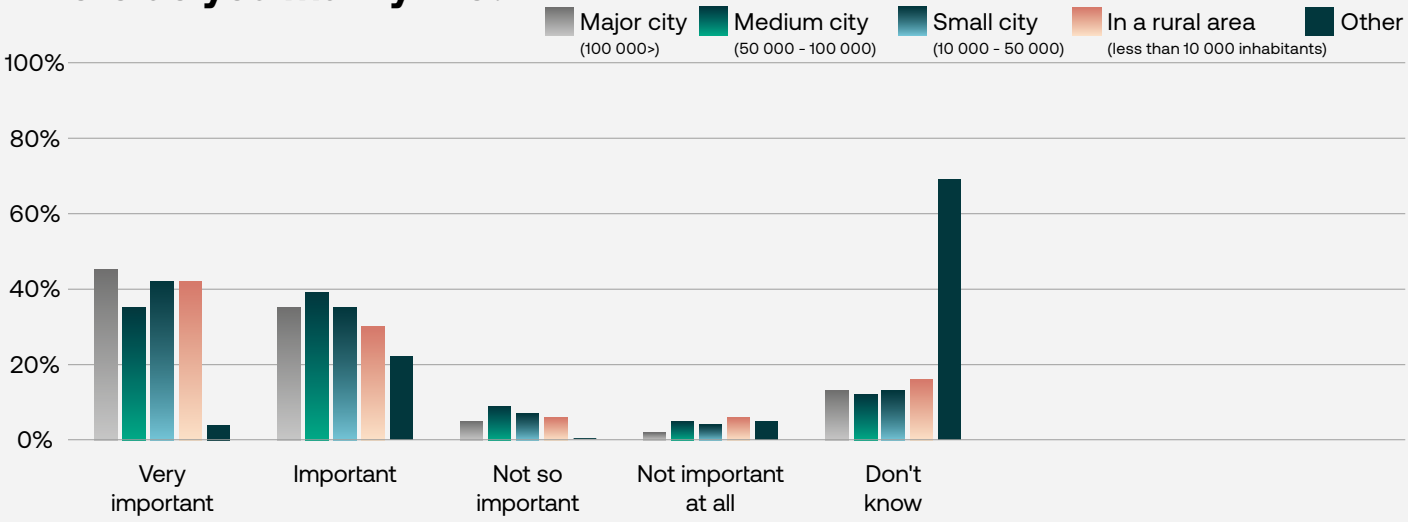
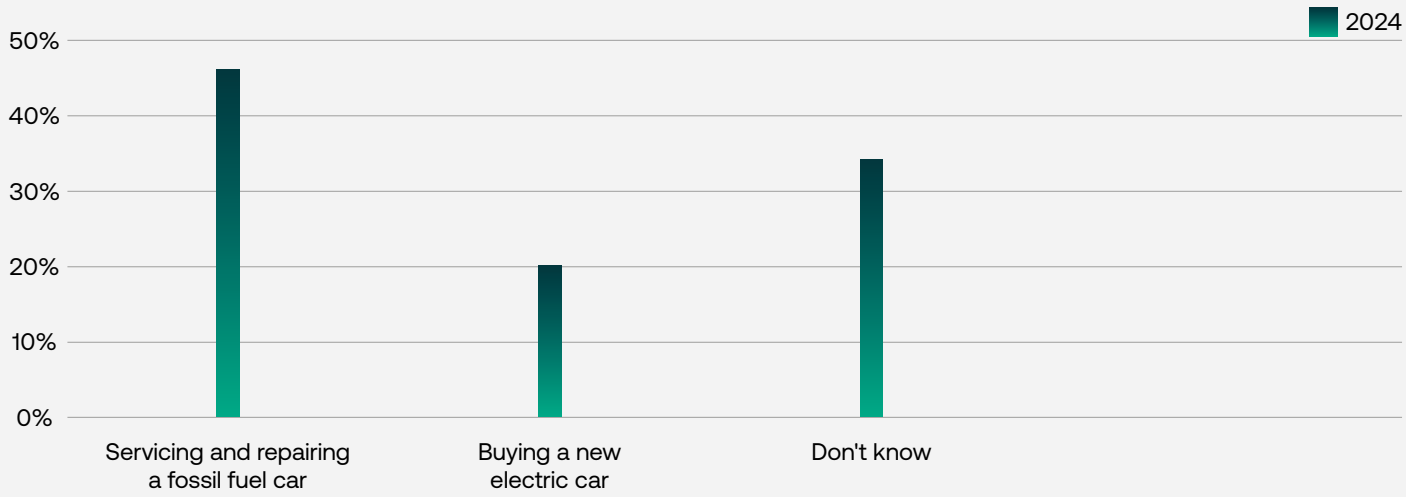


Where do you mainly live?



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

Total



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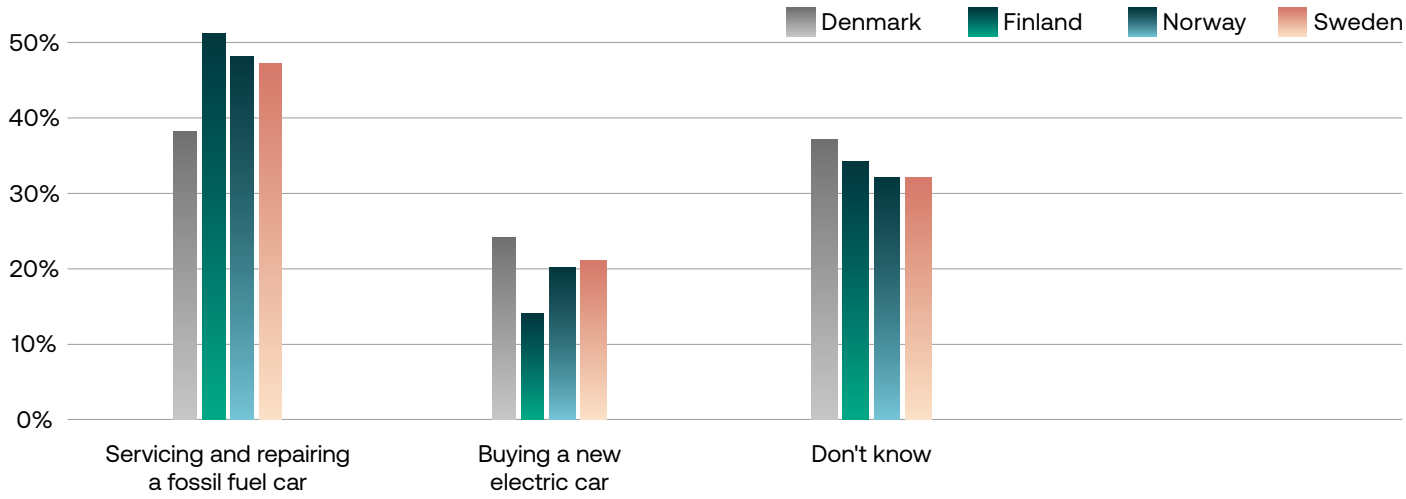
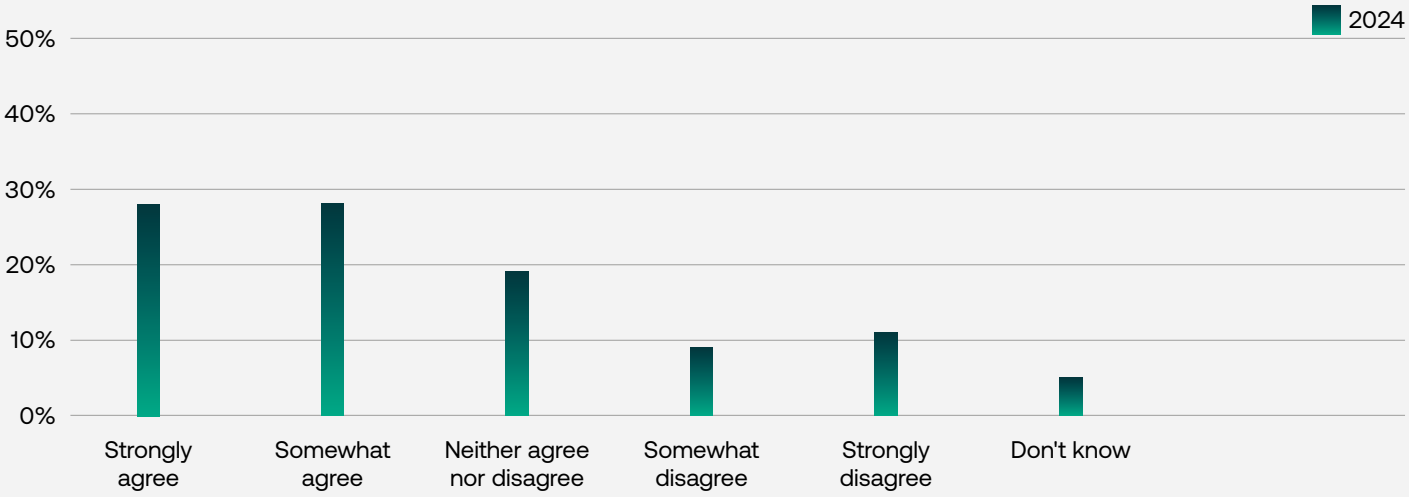


Breathalyzers for alcohol should be mandatory in all cars.

Total



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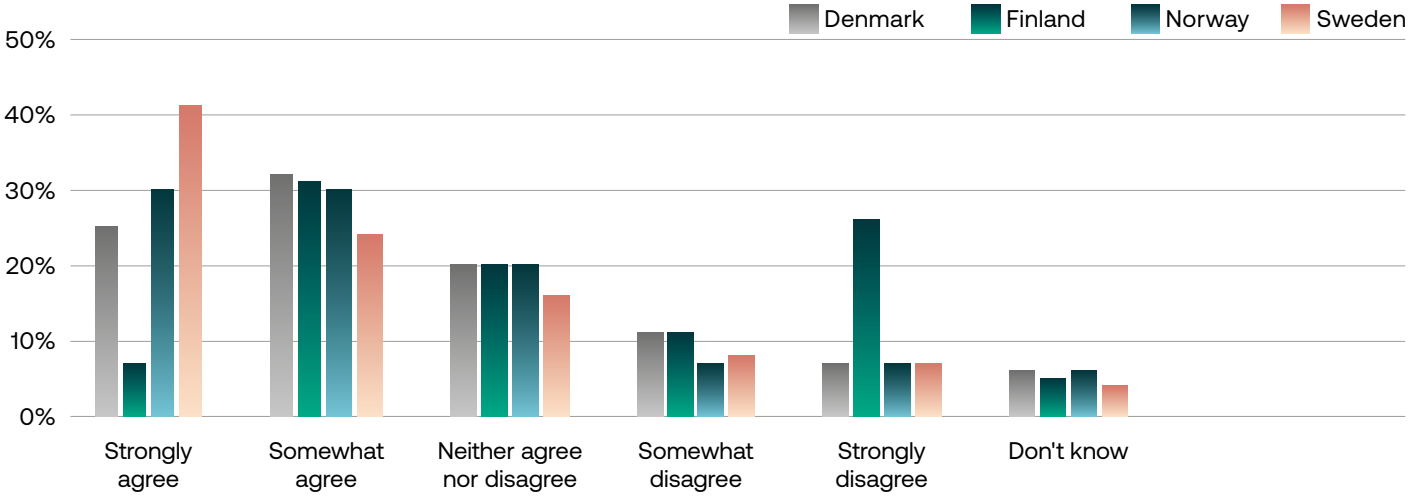

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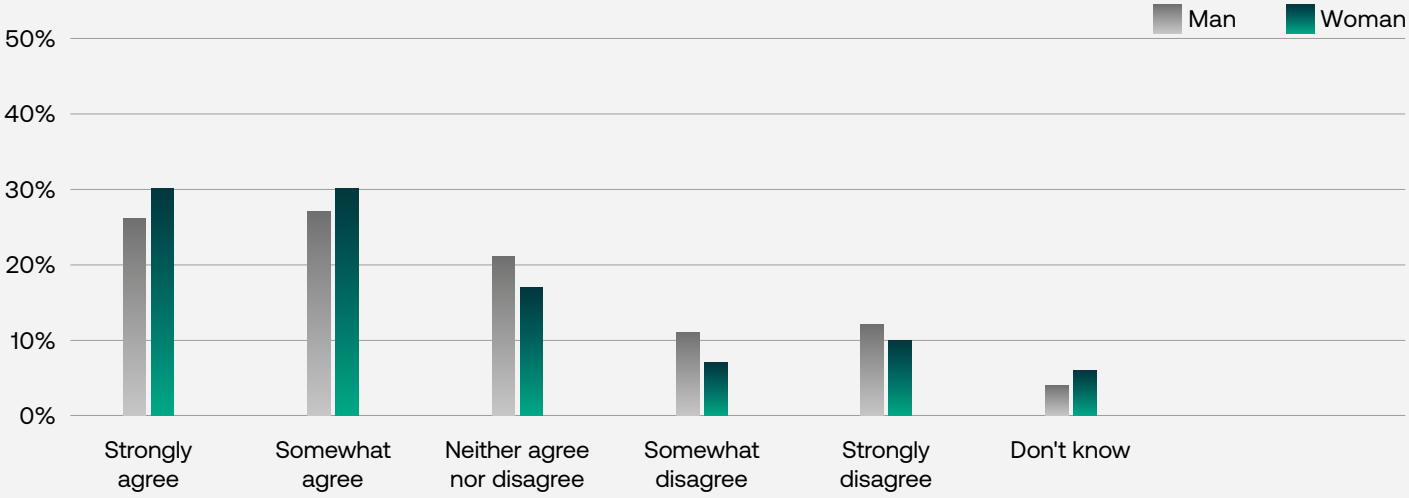

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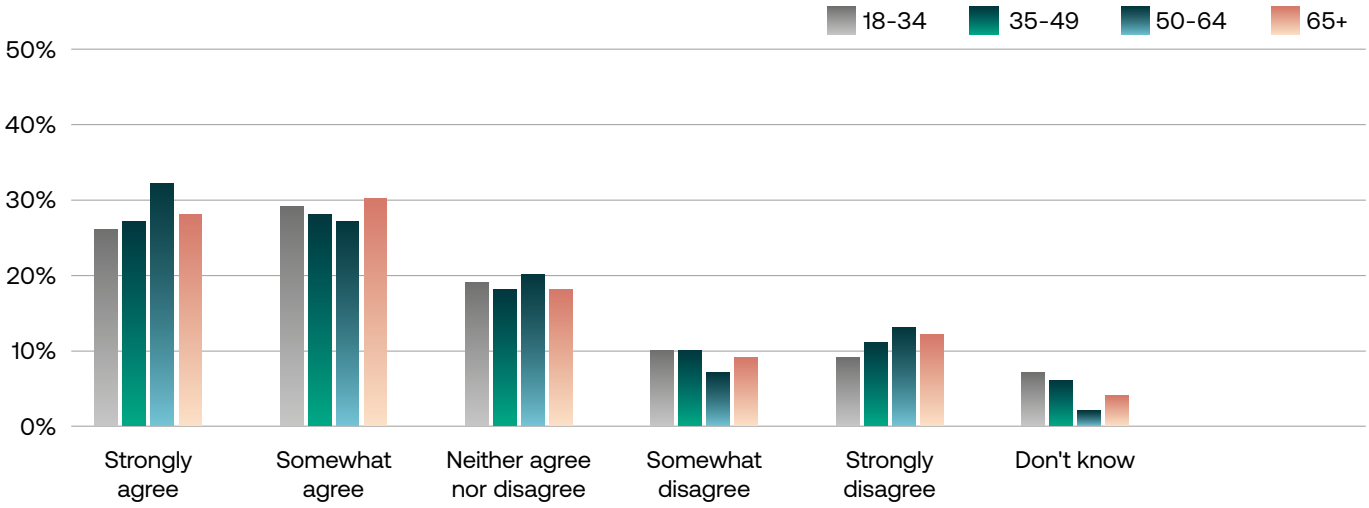
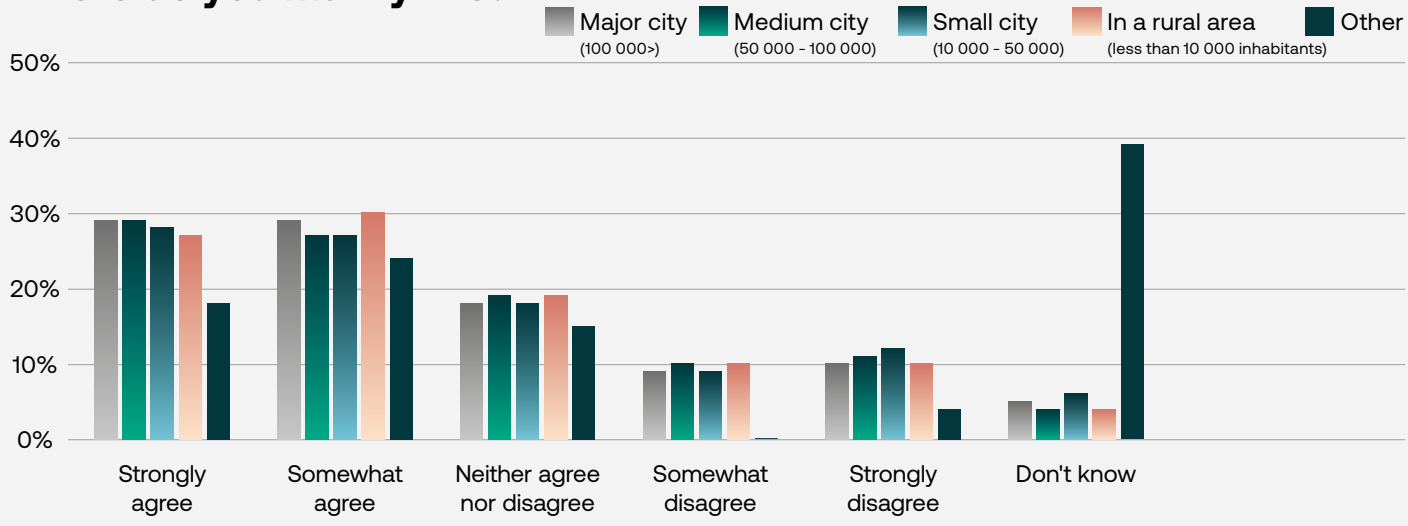
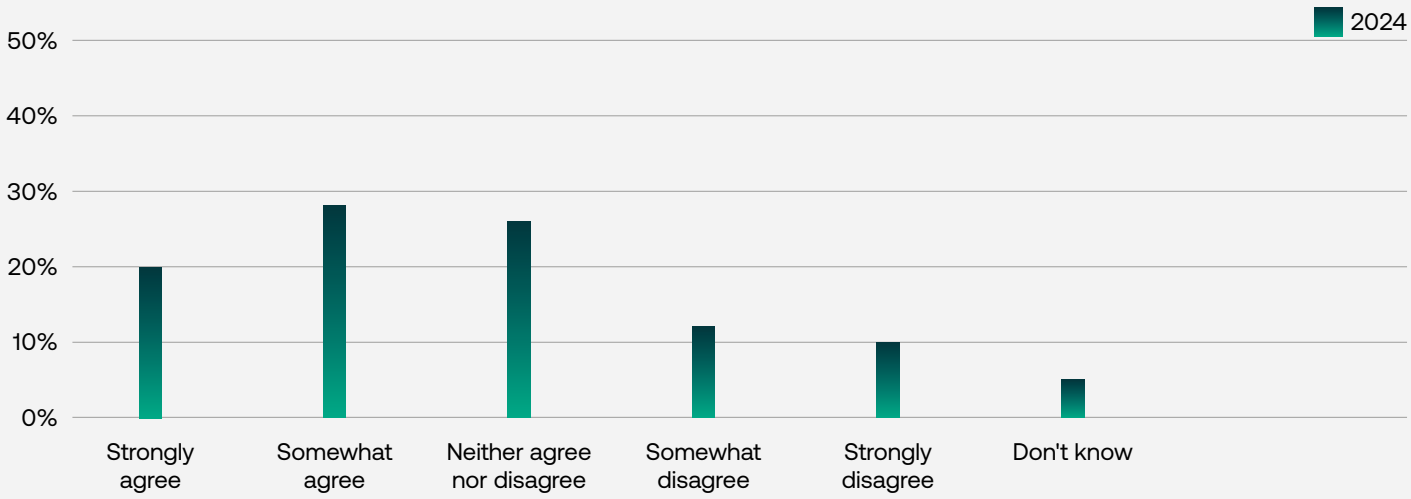


Where do you mainly live?



There should be more traffic cameras out on the roads.

Total



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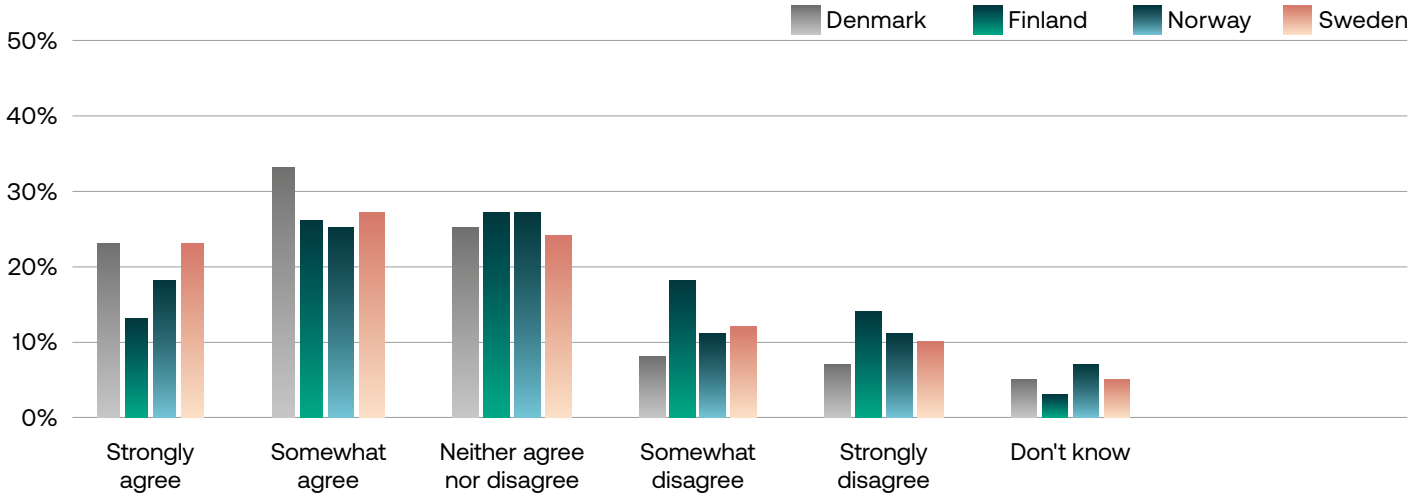

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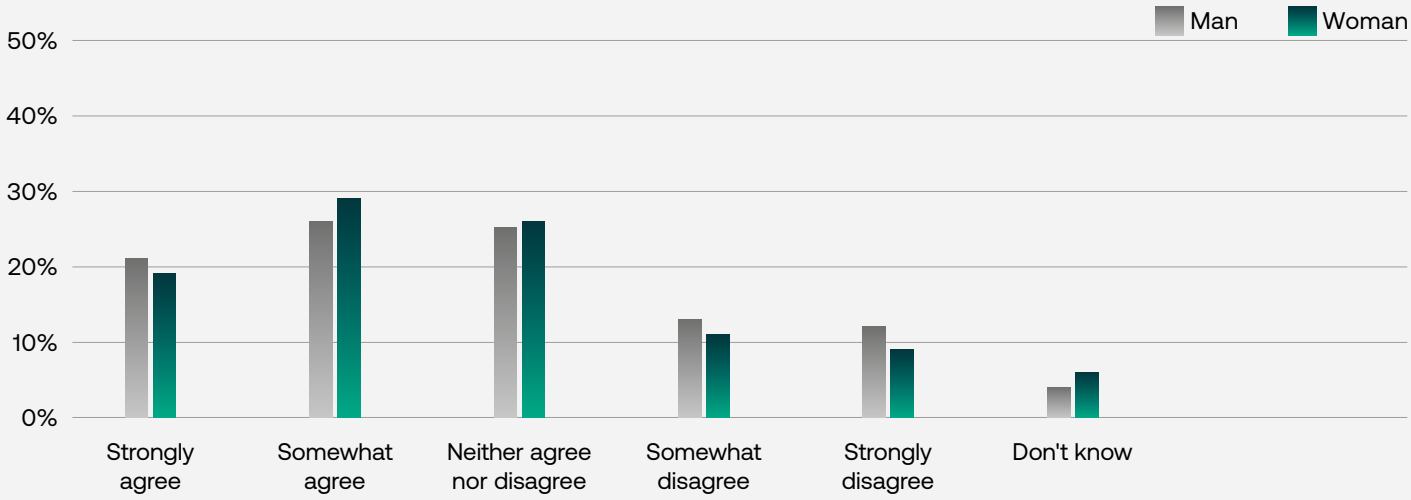

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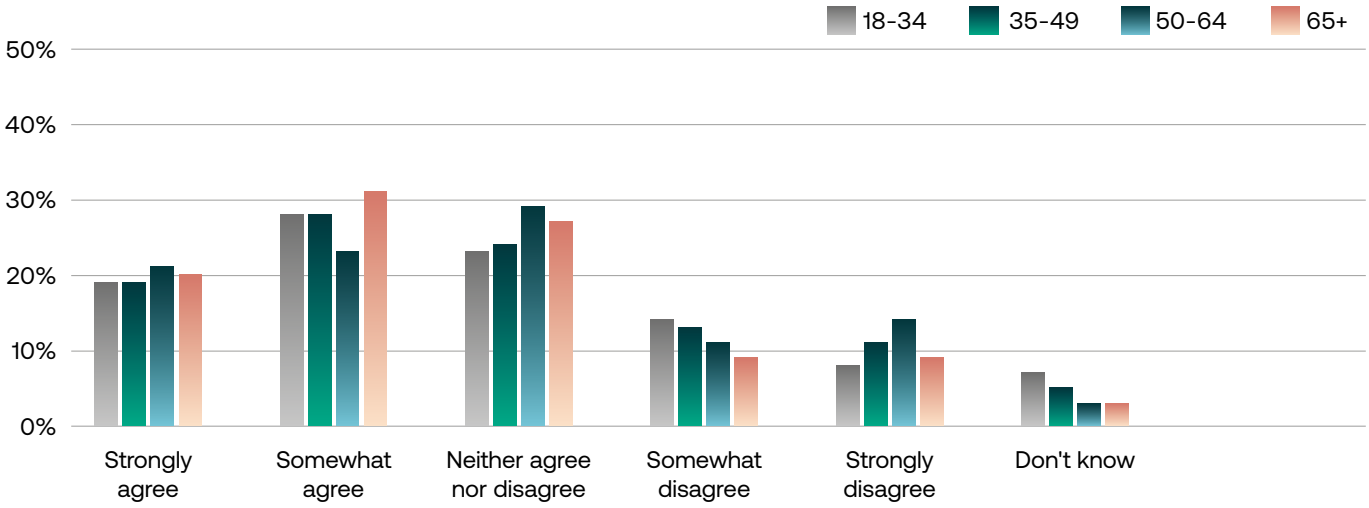
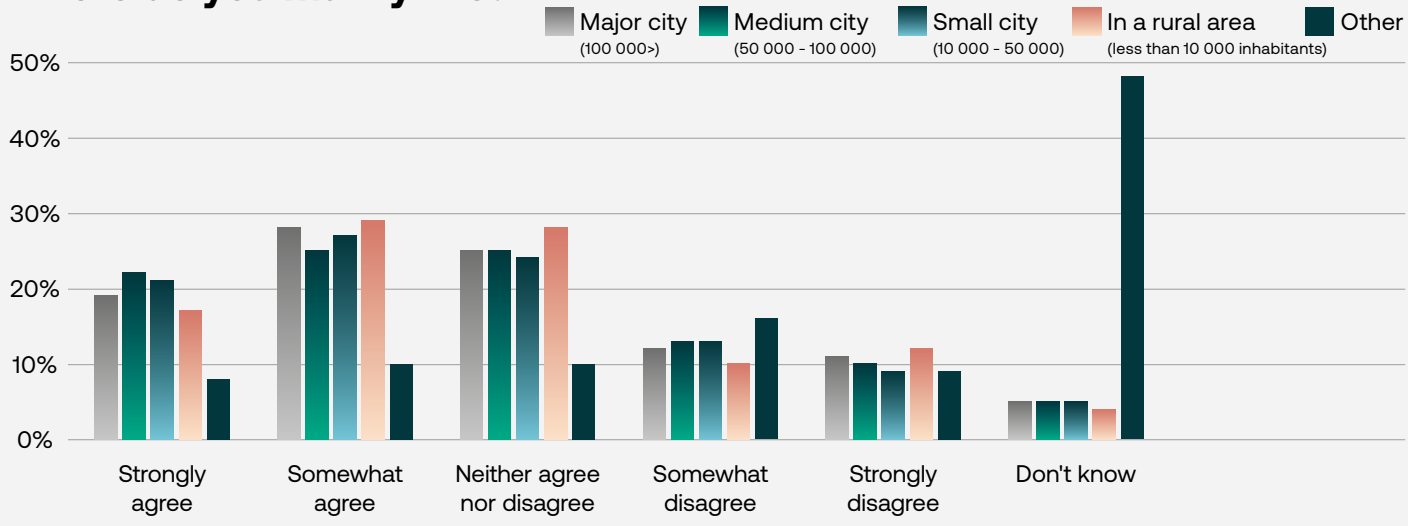
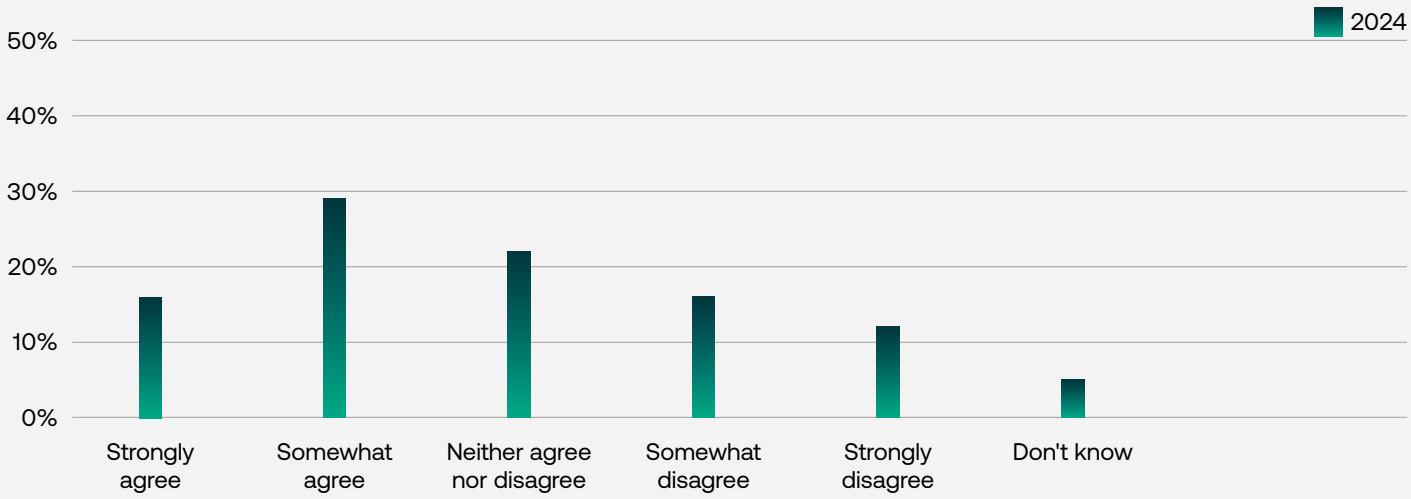


Where do you mainly live?

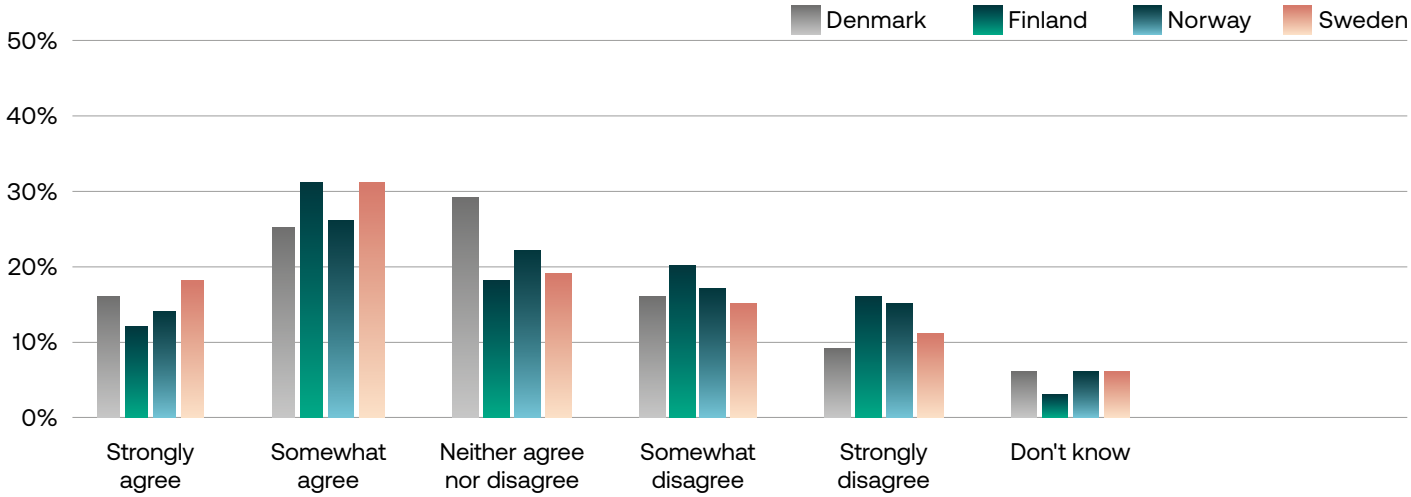


There should be an upper age limit for how long you are allowed to drive a car.

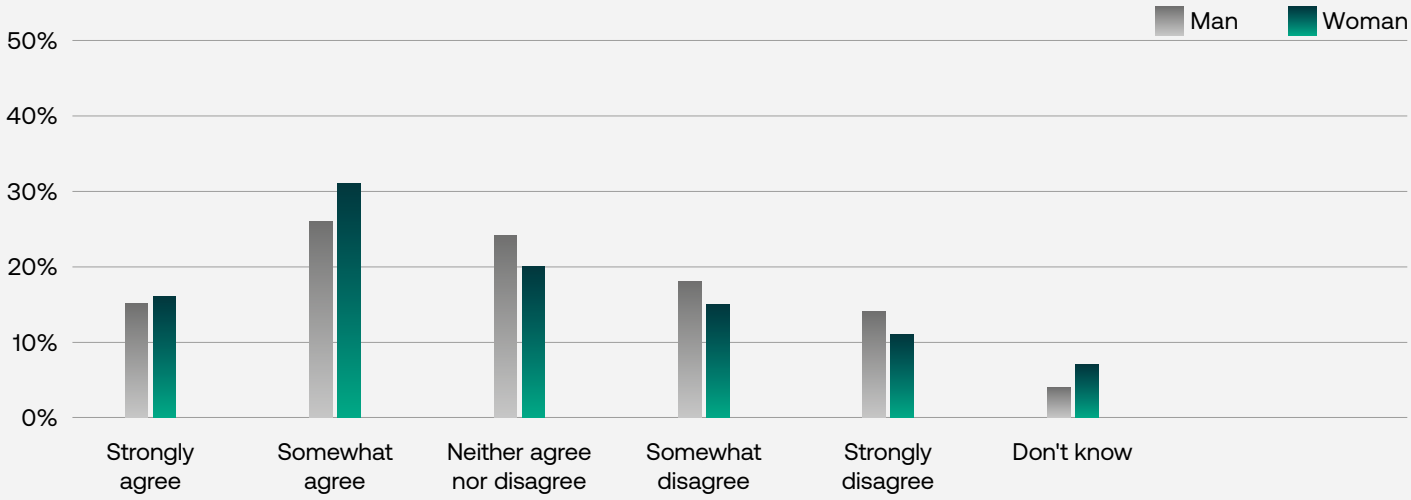
Total



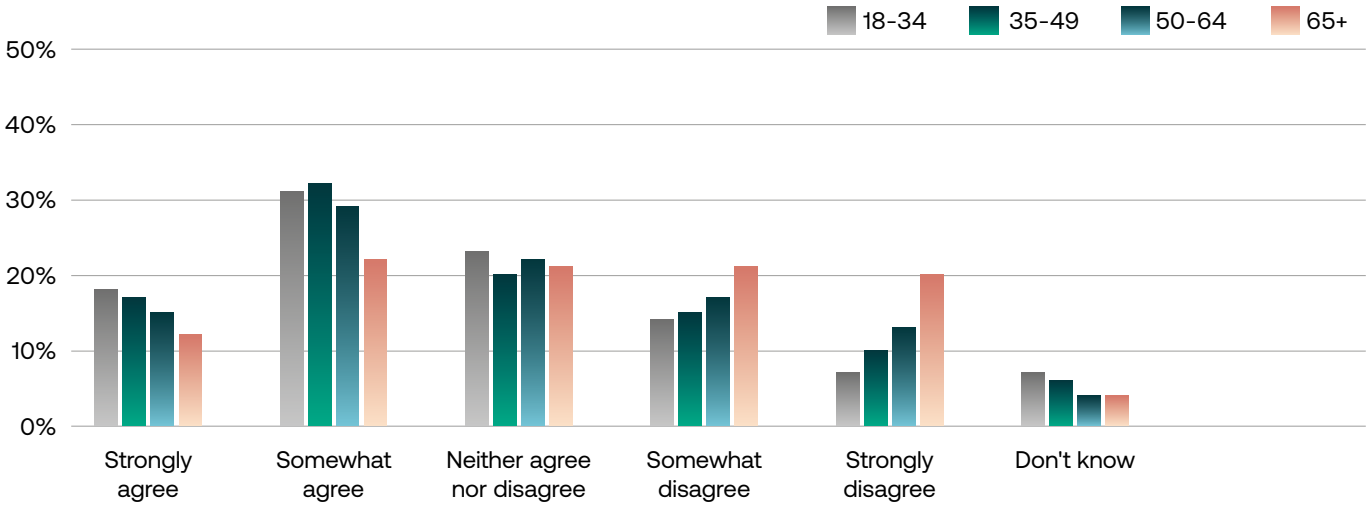
Countries



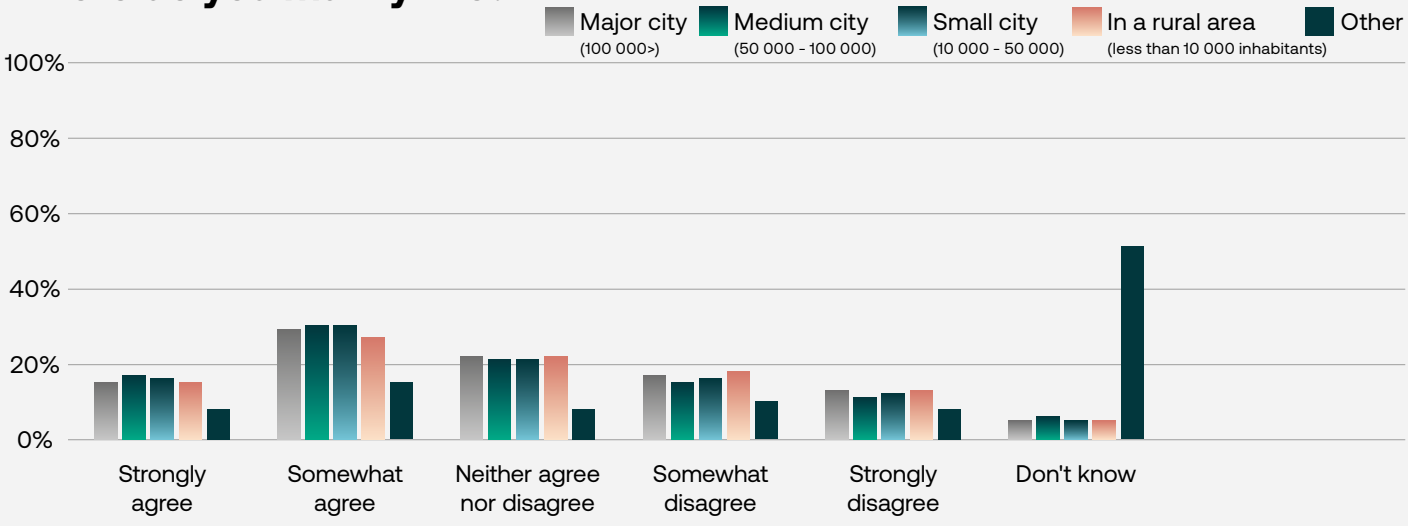
Gender



Age

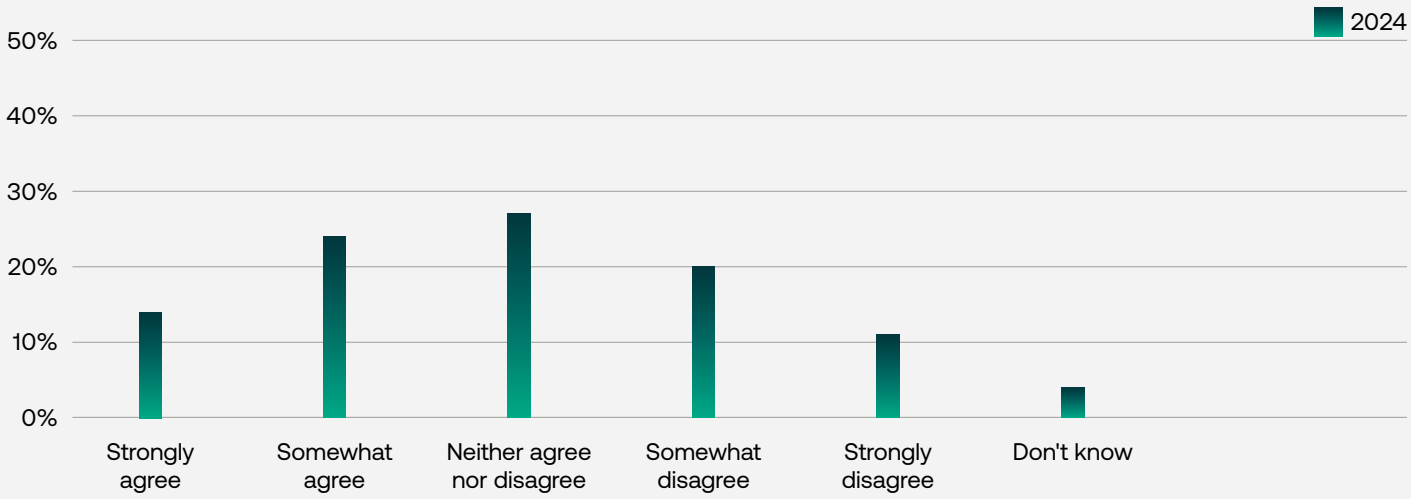


Where do you mainly live?



It’s a good thing to lower the speed limits on roads.

Total



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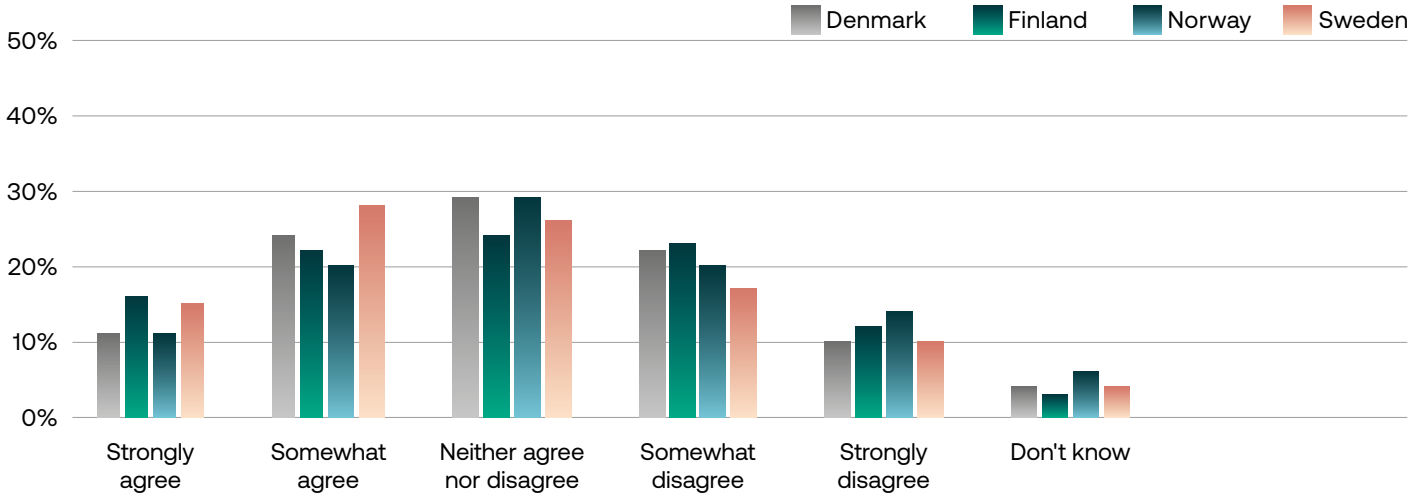

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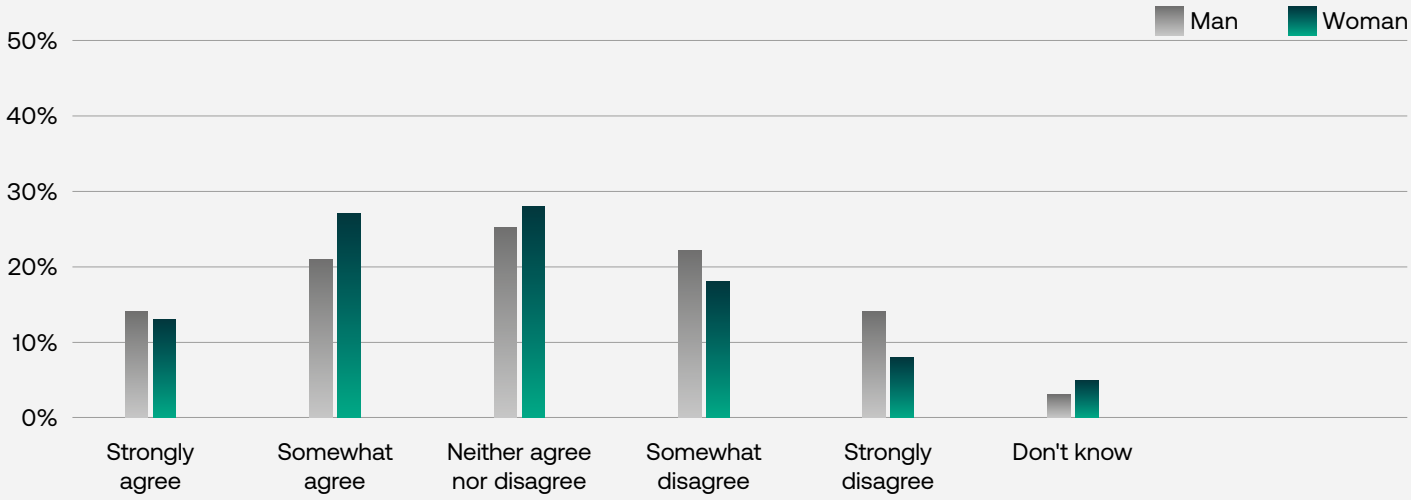

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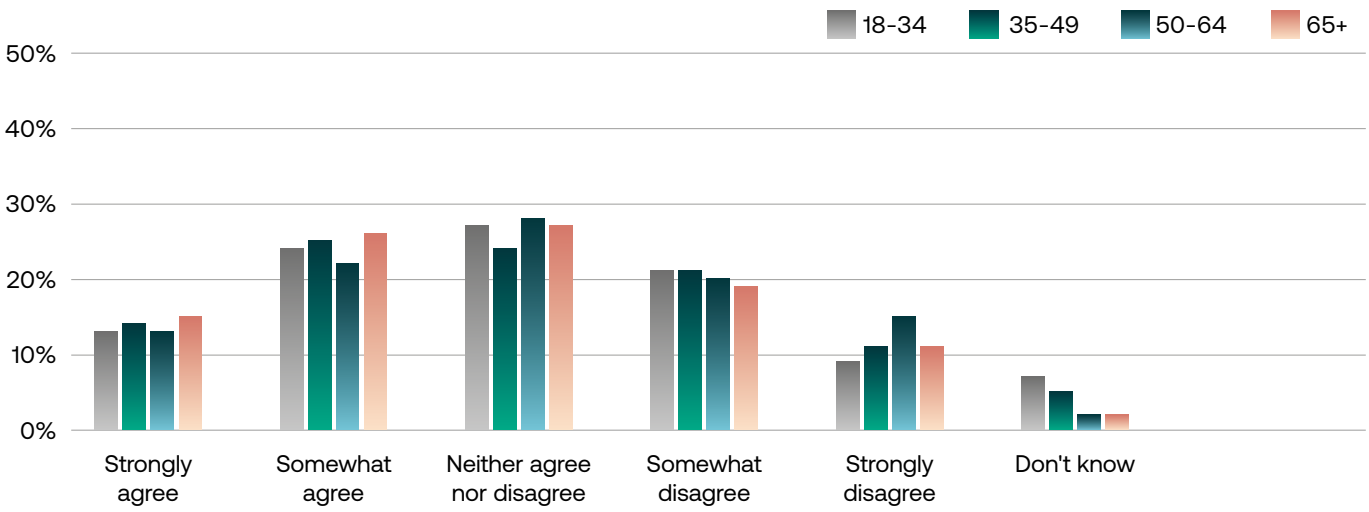
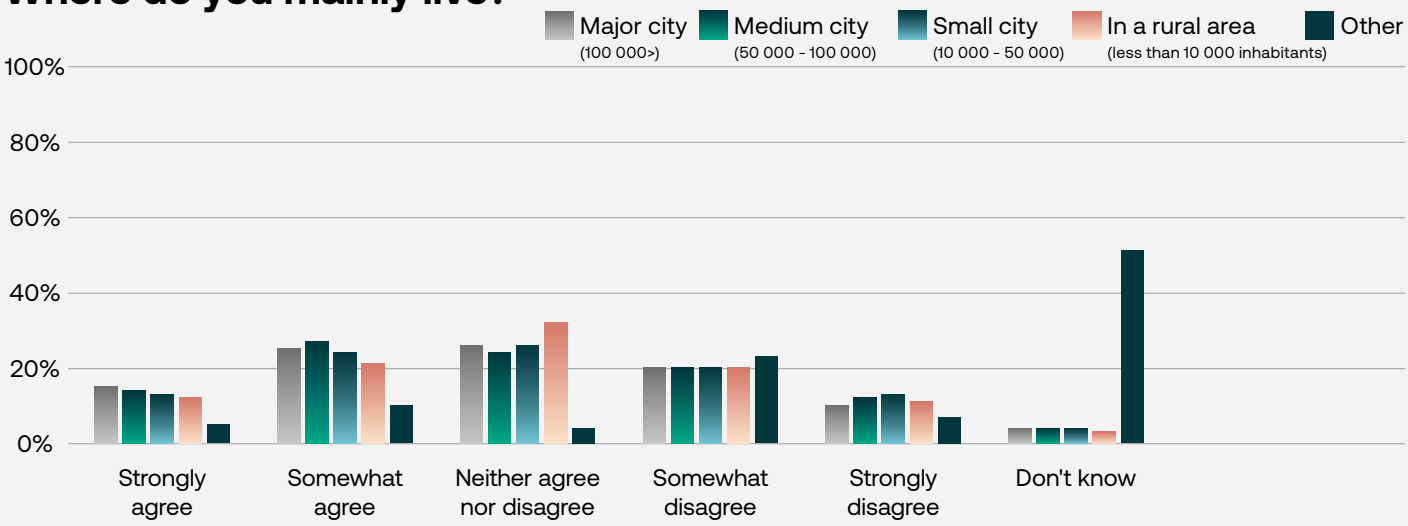
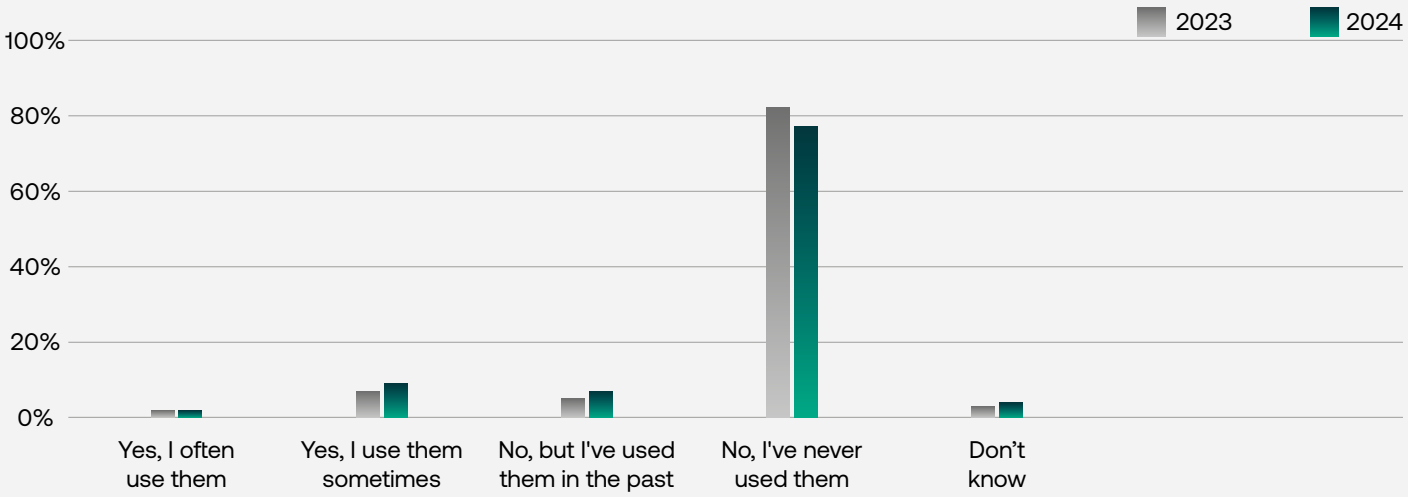


Where do you mainly live?



Have you ever used any car-sharing services?

Total



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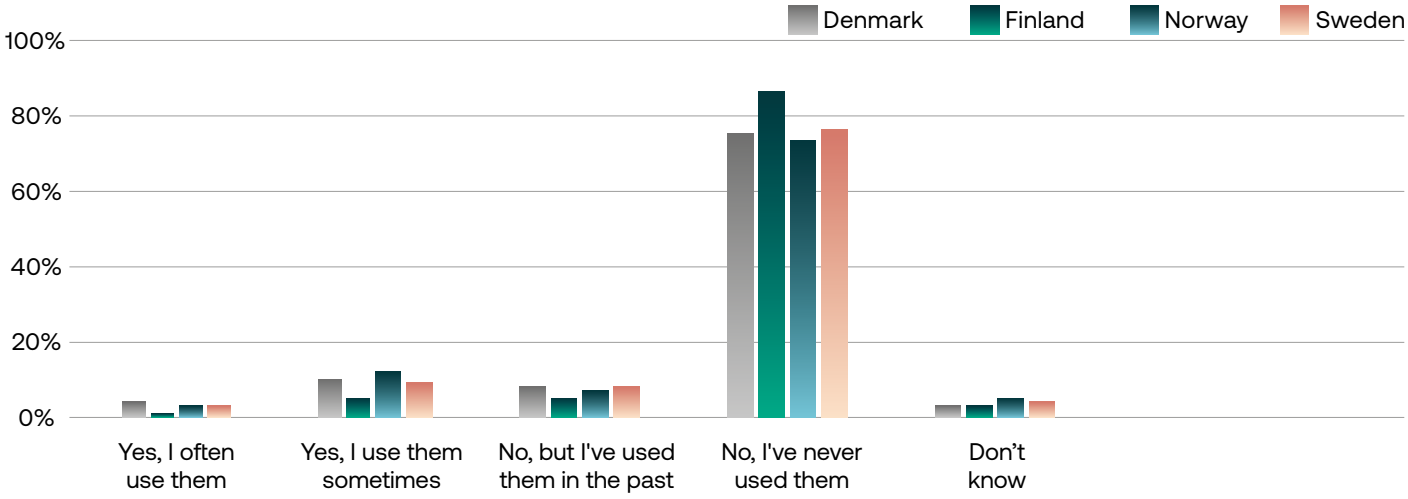

Mobility Barometer 2024

MEKO aims to be the most comprehensive partner for everyone who drives, repairs, and maintains vehicles in Northern Europe. Part of this involves driving the transition towards more long-term sustainable mobility, where we, for example, develop offers that reduce carbon footprints.

This involves meeting the service needs of traditional and electric cars as accessibly as possible, working to reuse spare parts in new ways, or launching new services for a more modern car life. To achieve this accurately, we want to know what and how the public thinks. That is why we condoct the Mobility Barometer.

The Mobility Barometer is the largest survey of its kind in the Nordics and is conducted on behalf of MEKO.

Over 4,000 people in Sweden, Norway, Finland, and Denmark are asked about their views on various modes of transport, the development of electric cars, new technology, traffic safety, and sustainable car ownership.

MEKO