NielsenIQ

Mobility around the World

Five trends shaping the road ahead

2026 global report



NIQ Consumer Life Global
November 2026

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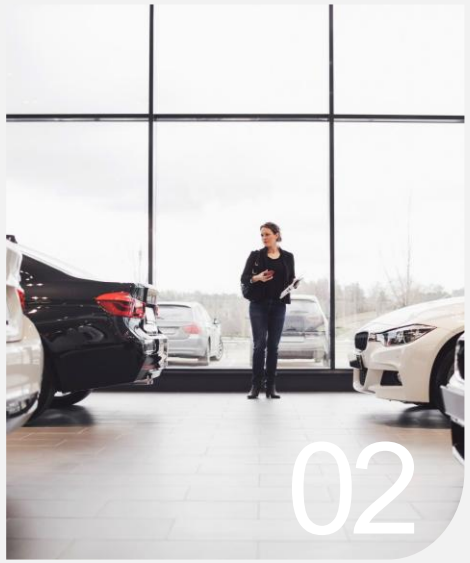
Five trends shaping global mobility needs in 2026 and beyond

Click on the image to find out more about the trend and what it means for marketers
Note: most of the generational insights are under the last trend



Mobility expands

After the disruptions of the pandemic era, mobility habits are normalizing and expanding. Private vehicle use is increasing globally, especially in emerging markets, but this growth is occurring alongside rising use of public transit, ride-sharing, and other shared mobility solutions.



Affordability takes the wheel

Affordability is reshaping the global auto marketplace, steering some shoppers toward smaller vehicles and accelerating the rise of Chinese automakers with feature-rich, value-oriented offerings. As AI becomes a key gateway to vehicle discovery, automakers will need not only compelling products, but also strong visibility in AI-generated recommendations to stay competitive.



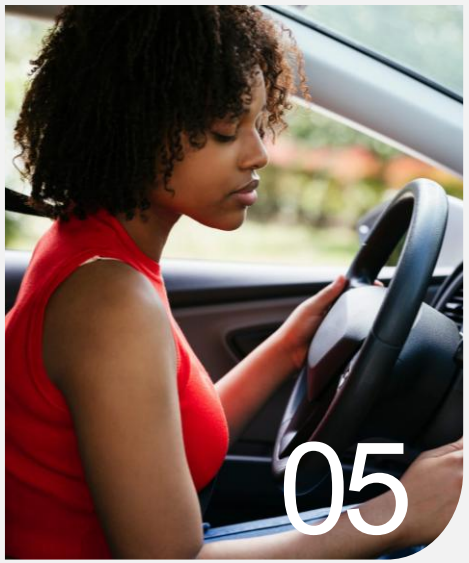
Multi-speed electrification

Global EV sales are hitting new highs, fueled by rising energy costs and affordable Chinese models. Yet momentum varies widely by region: while battery electric vehicle (BEV) adoption is accelerating in some markets, hybrids are emerging as a practical bridge to full electrification for many consumers.



Assistance over autonomy

While growing safety concerns have tempered enthusiasm for fully autonomous vehicles, demand for driver-assistance and safety features has gone mainstream as consumers embrace technologies that empower drivers rather than replace them.



Gen Z rewrites the roadmap

Gen Z is the first generation to come of age amid mainstream electrification and multi-modal mobility. As their purchasing power grows, they're reshaping automotive demand through their openness to alternative powertrains, flexible transportation, and vehicles that blend technology with self-expression.

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Mobility expands

After the disruptions of the pandemic era, mobility habits are normalizing and expanding. Private vehicle use is increasing globally, especially in emerging markets, but this growth is occurring alongside rising use of public transit, ride-sharing, and other shared mobility solutions. Rather than replacing one mode with another, consumers seem to be assembling mobility ecosystems that fit different journeys and life contexts.

Implications

- As consumers embrace a more multi-modal approach to transportation, automakers, cities, insurers, and mobility providers will need to think beyond individual modes and design for increasingly interconnected mobility ecosystems.
- Mobility strategies should reflect a growing geographic divide: emerging-market cities are driving ownership growth, while developed-market ownership remains rooted in suburbs and smaller communities.

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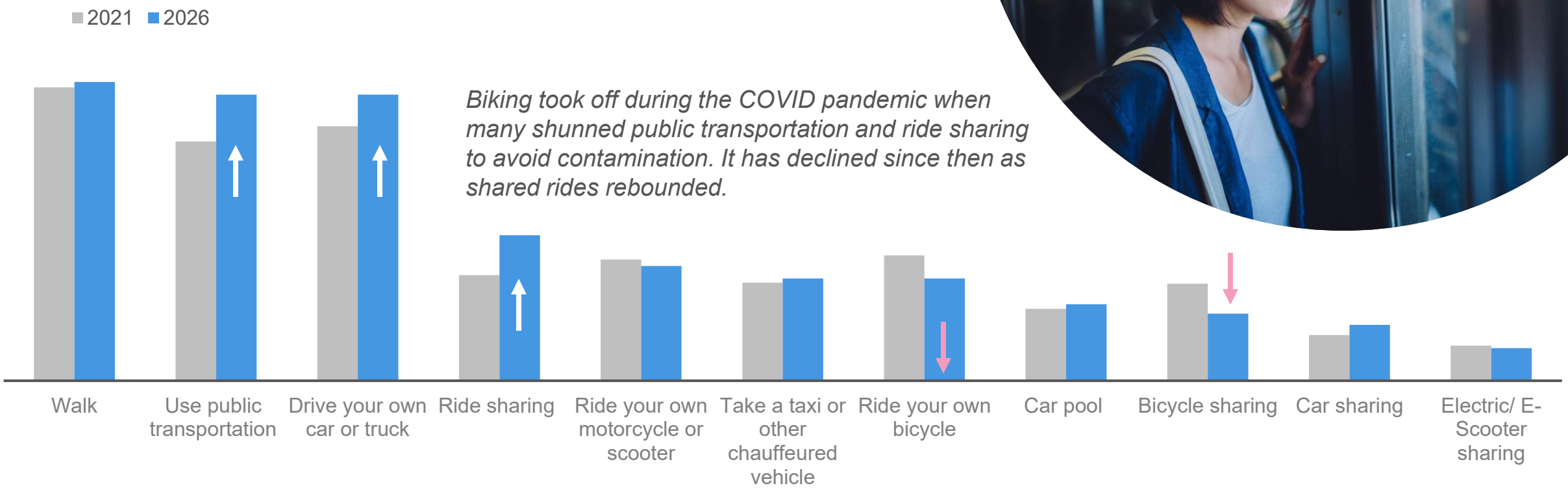
Both private and shared rides have risen since 2021

Biking declined from COVID highs

% of global consumers who currently use the following forms of transportation



Biking took off during the COVID pandemic when many shunned public transportation and ride sharing to avoid contamination. It has declined since then as shared rides rebounded.



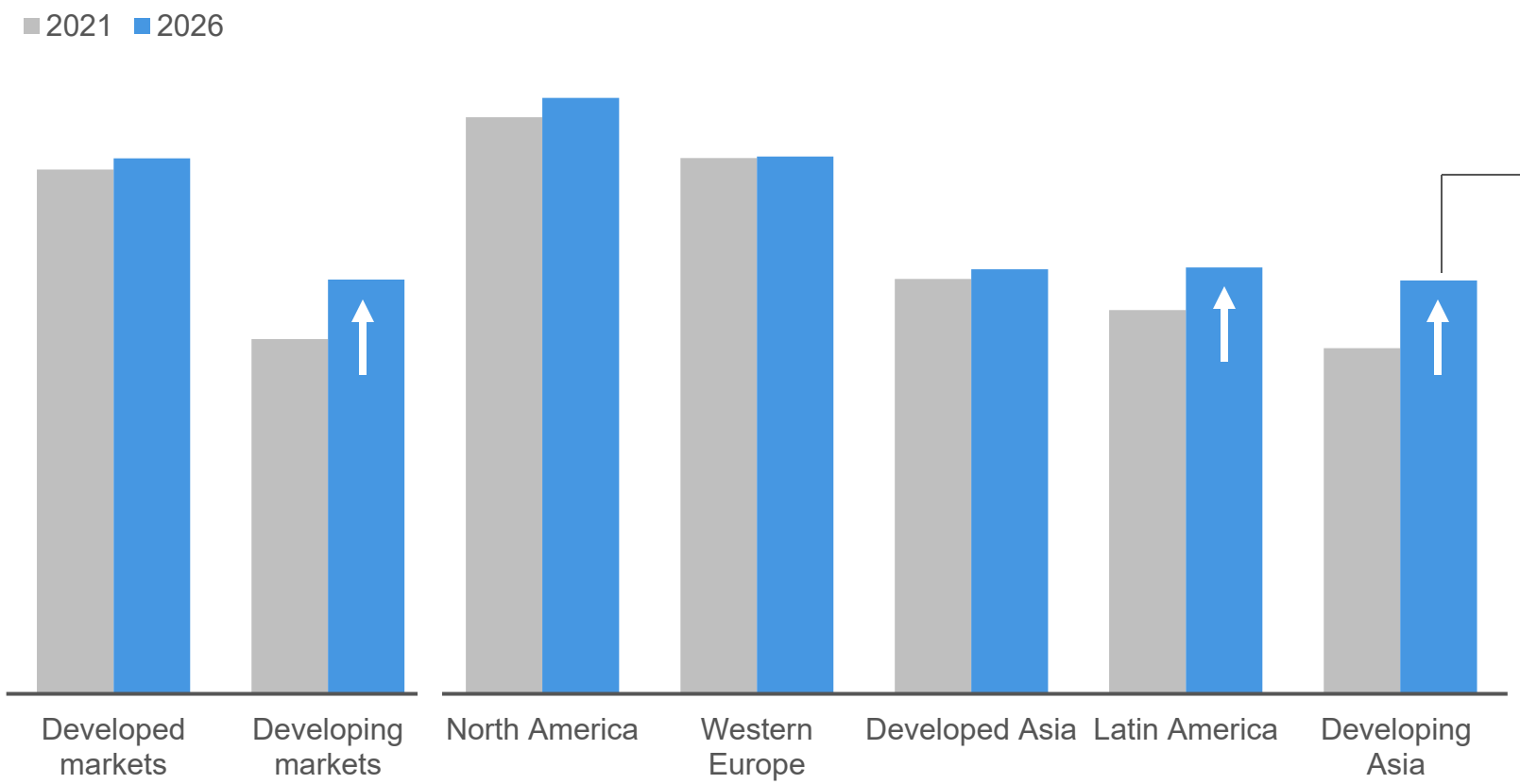
NIQ Consumer Life Global 2021 and 2026, D5a (global = core 18)

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Emerging markets are narrowing the gap with developed ones in private vehicle use

North America remains the most car-oriented region, but private vehicle use is growing fastest in developing markets, led by China and Indonesia

% of consumers who currently drive their own vehicles to get to the places they go to



Driving own vehicles is up the most in China (up XX pts from 2021 to XX%) and Indonesia (up 11 pts to 38%).

Despite an auto market slow-down in 2026, China saw a notable increase in vehicle sales and total registered vehicles over recent years. The nation's registered civilian vehicles reached over XX million by the end of 2025, up XX% since 2021.

NIQ Consumer Life Global 2021 and 2026, D5a (global = core 18); Developed markets: North America, Developed Asia, and Western Europe, Developing markets: Developing Asia, Latin America, Russia, and South Africa;
China civilian vehicle ownership 2025, China's total vehicle sales

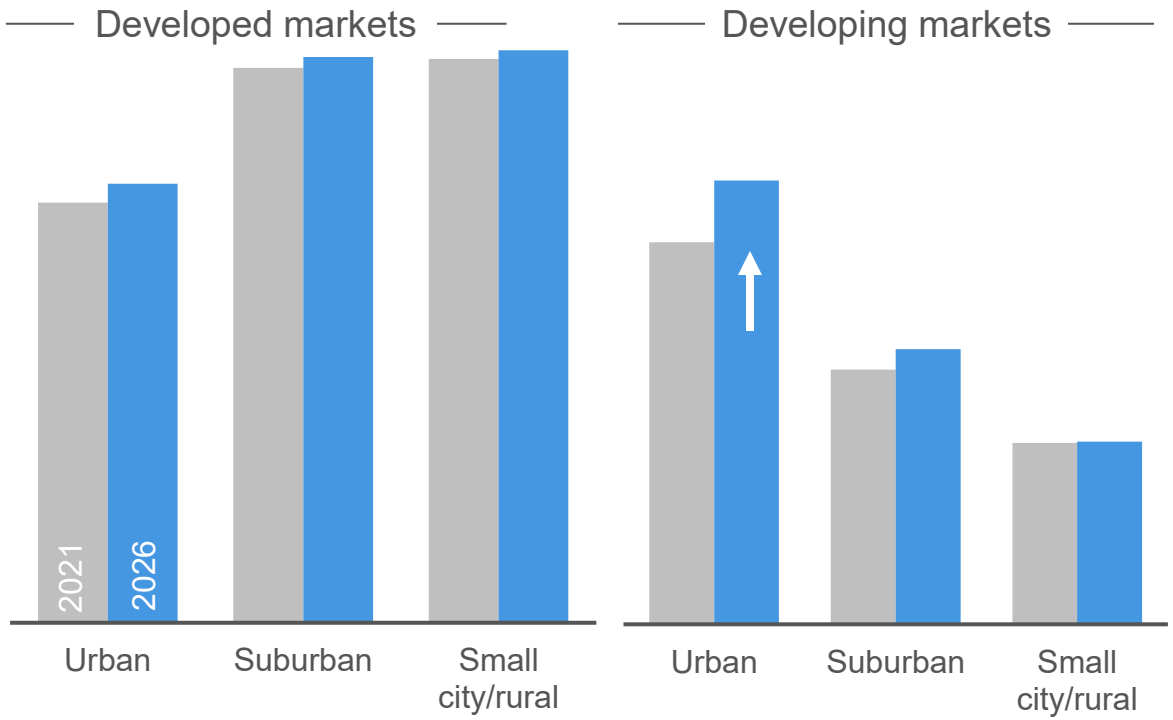
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The growing urban divide

Cities suppress car reliance in developed markets but increasingly boost it in developing ones, where wealth is concentrated in urban centers

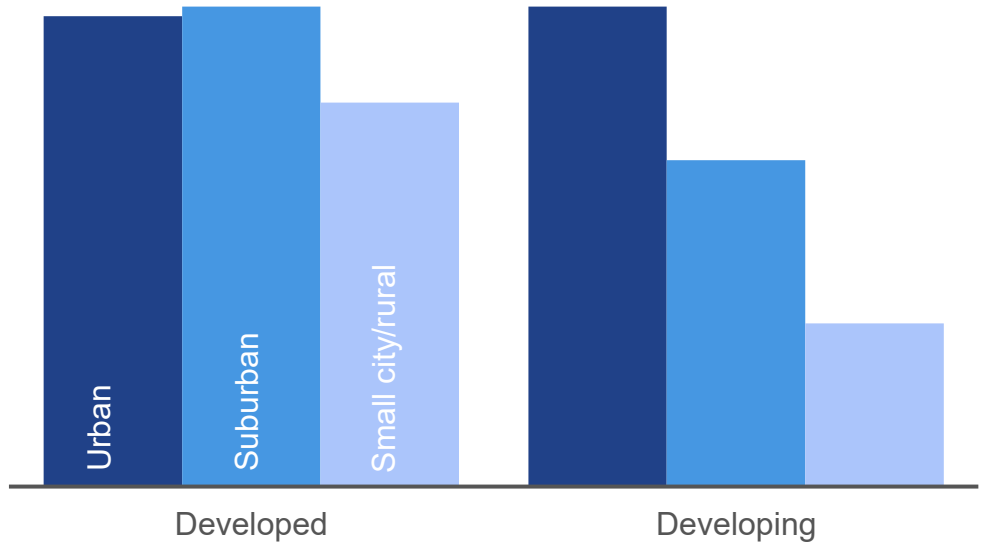
Urbanites are less likely to drive private vehicles in developed markets but more in emerging ones, with growth trends pushing the two patterns further apart.

% of global consumers who currently drive their own vehicles to get to the places they go to



Wealth drives private vehicle ownership in urban cores in emerging markets, where urbanites are by far the most affluent.

*% with high or medium high household income**



NIQ Consumer Life Global 2021 and 2026, D5a (global = core 18); Developed markets: North America, Developed Asia, and Western Europe, Developing markets: Developing Asia, Latin America, Russia, and South Africa;
*Quartile income

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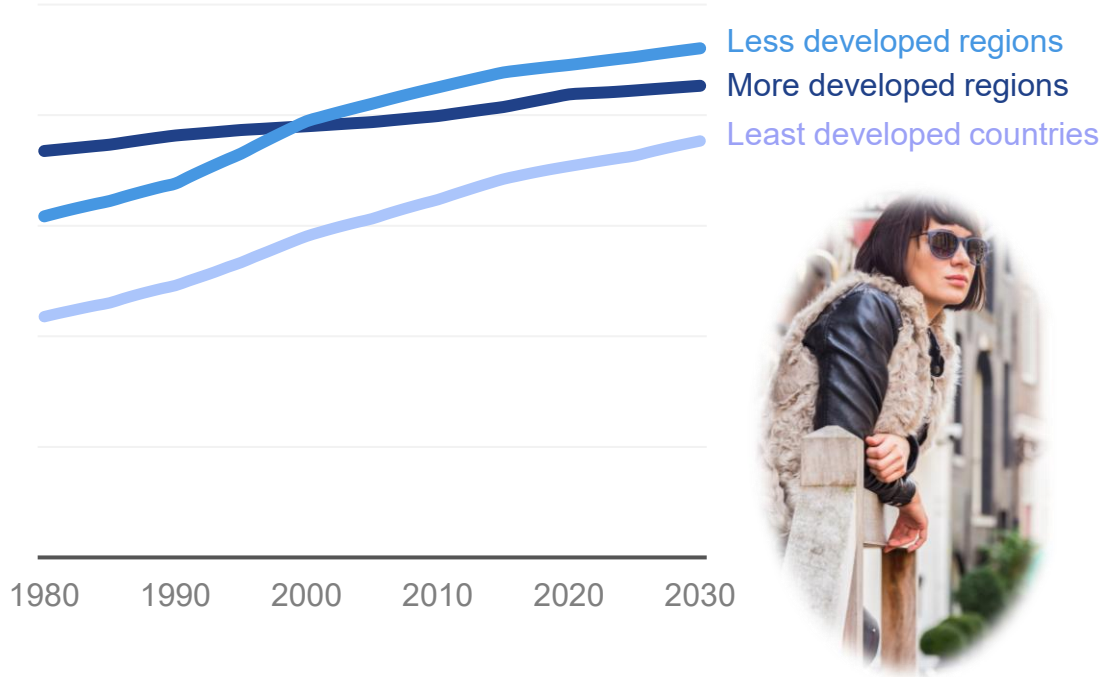
Urbanization patterns bode well for vehicle ownership

Urbanization in emerging markets and suburban resurgence in some of the developed ones support private mobility

Emerging markets lead the urbanization wave

XX% of those in developing markets moved to a **city center or more populated** area in the past 3 years, compared with just XX% in developed markets

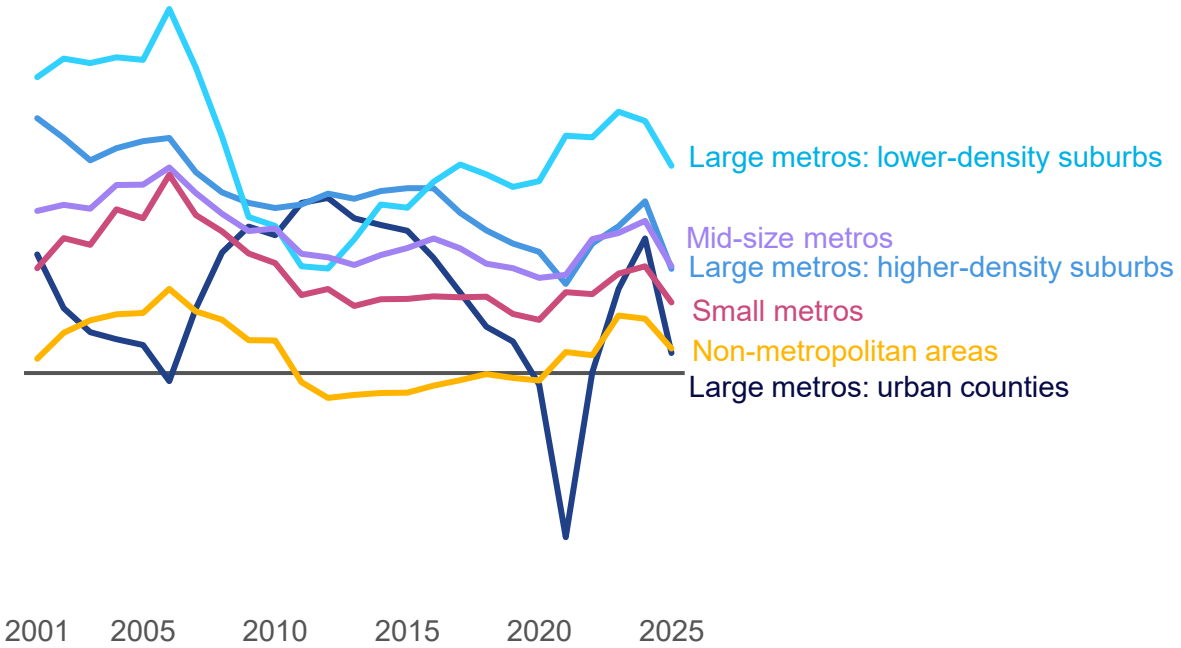
Share of population living in cities, %



Some more developed markets face urban exodus: US as an example

For over a decade, domestic migration in the US has favored suburbs, especially outer suburbs and exurbs. More recently, slower immigration has created additional headwinds for urban cores, which have historically relied more heavily on international migration to sustain population growth.

Annual population change by county type, US, 2001-2025



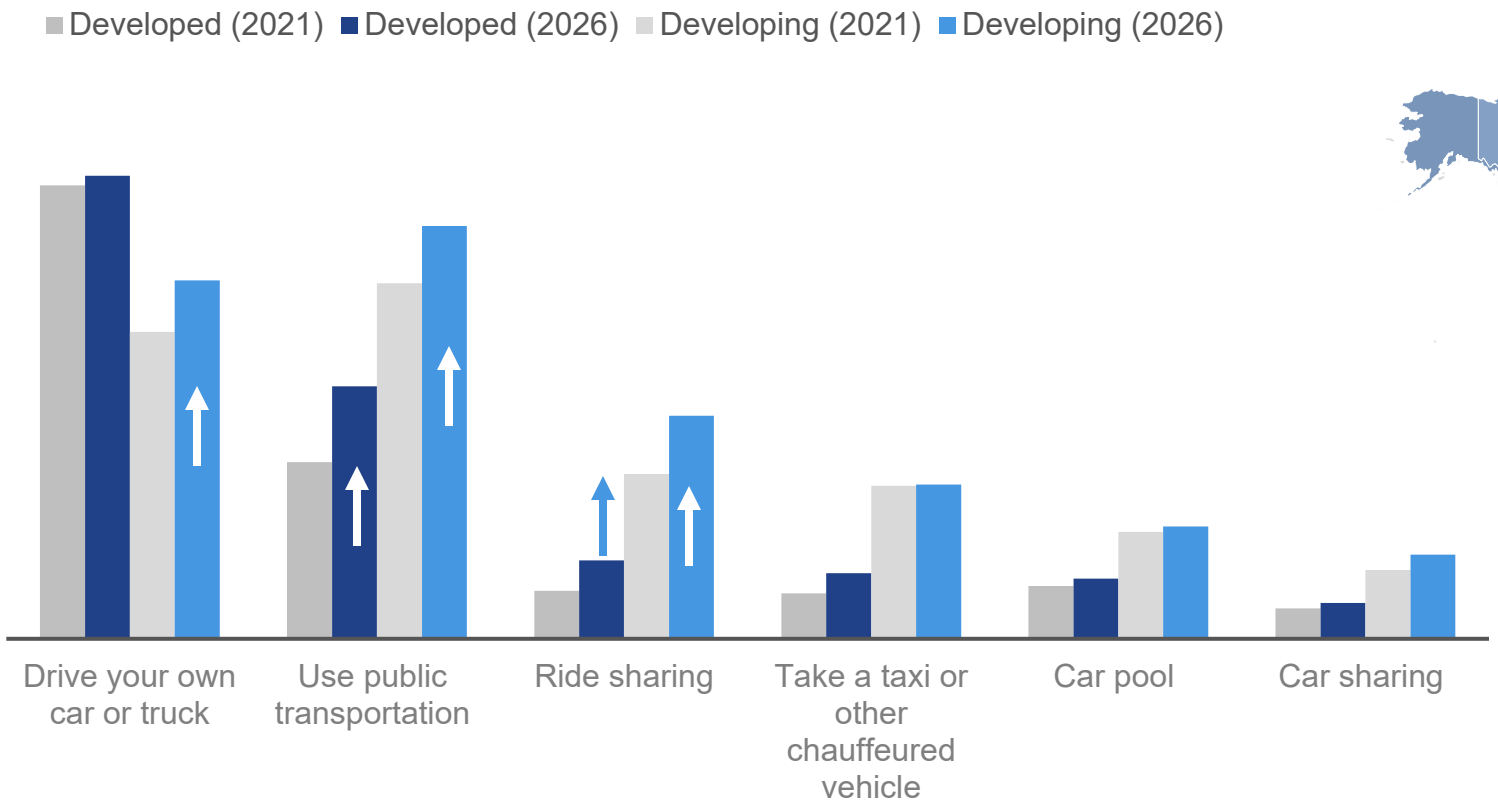
NIQ Consumer Life Global 2026 L07 (global = 39 countries); developed markets: North America, Western Europe, and Developed Asia, developing markets = Latin America, Developing Asia, Central/Eastern Europe, Middle East & Africa, and Russia;
Urbanization by development, With less immigration, urban growth slowed in 2025, Population gains in metro areas driven largely by growth in the exurbs

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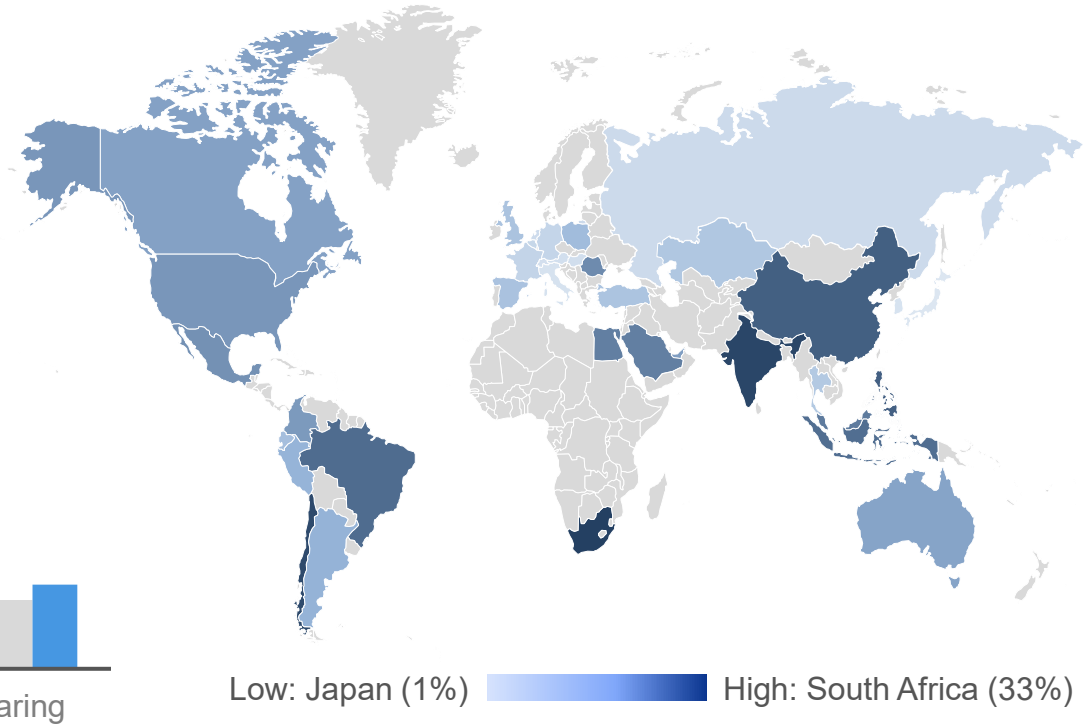
Growth in private vehicle use has NOT come at the expense of shared rides

Public transit and ride sharing are seeing increased adoption in both developed and emerging markets, even as private vehicle use continues to rise

% of consumers who currently use the following forms of transportation



% of consumers who currently use ride sharing services, 2026



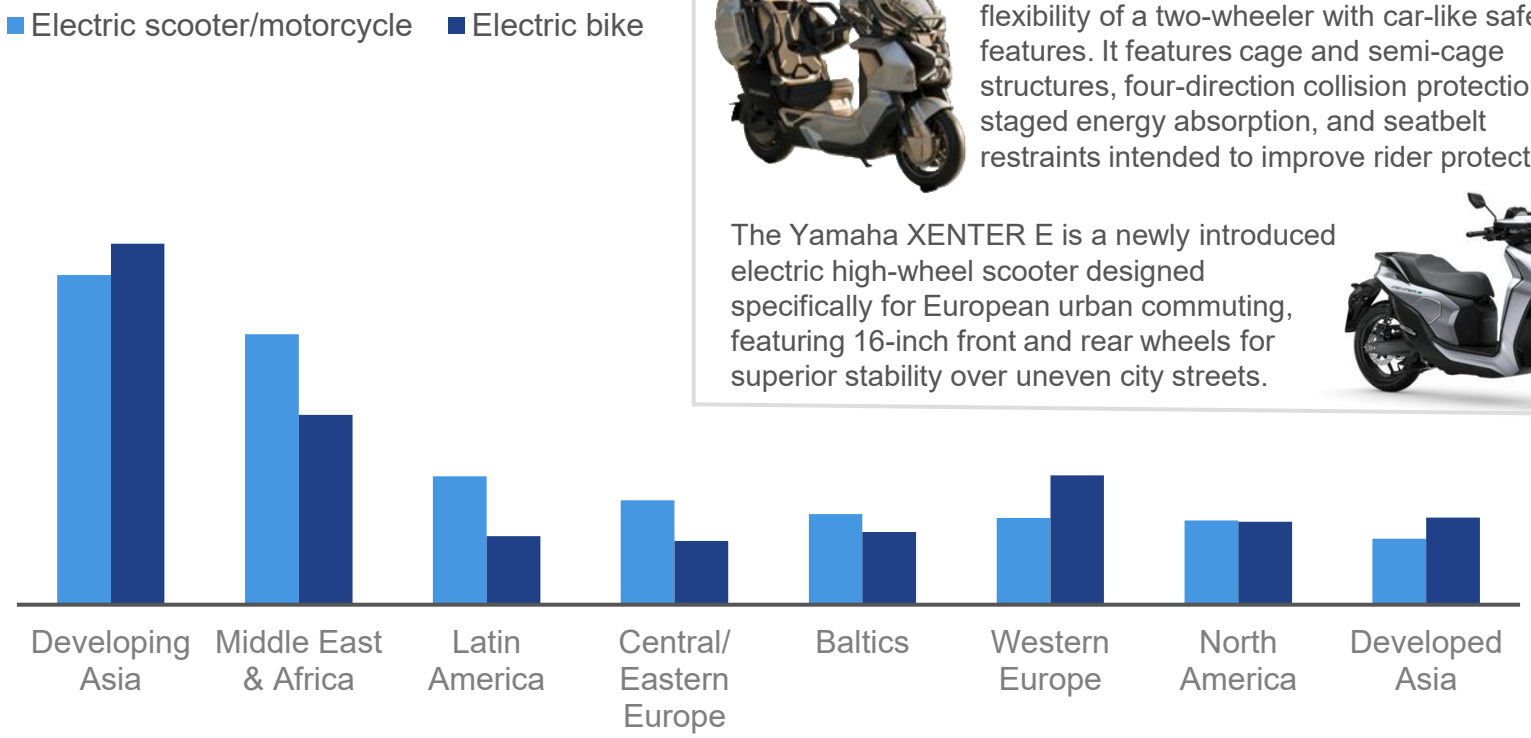
NIQ Consumer Life Global 2021 and 2026, D5a (global = core 18 for trended data on developed vs. developing markets);
Developed markets: North America, Developed Asia, and Western Europe, Developing markets: Developing Asia, Latin America, Russia, and South Africa

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Developing Asia leads the rise of electrified micromobility solutions

Notable growth is expected for e-bikes, scooters, and motorcycles in coming years

% of consumers who ride electric scooters/motorcycles or bikes



New solutions improve appeal

The Segway X Cruiser, unveiled in late 2026, is an electric scooter that combines the flexibility of a two-wheeler with car-like safety features. It features cage and semi-cage structures, four-direction collision protection, staged energy absorption, and seatbelt restraints intended to improve rider protection.

The Yamaha XENTER E is a newly introduced electric high-wheel scooter designed specifically for European urban commuting, featuring 16-inch front and rear wheels for superior stability over uneven city streets.

Notable growth is expected

The global electric e-bike market size was valued at USD 57.50 billion in 2025 and is projected to grow from USD 65.80 billion in 2026 to USD 193.23 billion by 2034, registering a CAGR of 14.40% over the forecast period. Asia Pacific dominated the electric e-bike market with a market share of 56.50% in 2025.

The global electric scooter and motorcycle market was estimated at over 6.2 million units in 2025 and is projected to reach 10.3 million units by 2030, representing a volume CAGR of 10.7% from 2026 to 2030. In value terms, the market was estimated at USD 10.1 billion in 2025 and is projected to reach USD 18.4 billion by 2030, reflecting a CAGR of 12.7%. Asia Pacific dominated the market in 2025, accounting for 89.7% of global volume, led by China (56.4%) and India (20.6%). While China remains the largest market, demand beyond China is expected to drive the next phase of growth.

NIQ Consumer Life Global 2025, D37, D38 (global = 40 countries), Global e-bike market, Global electric scooter and motorcycle market, Segway launches new electric motorcycle, Yamaha's new electric scooter takes aim at Europe's 125cc commuters

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Affordability takes the wheel

Affordability has become more top of mind in vehicle choices as consumers grapple with elevated economic pressure, reshaping the global auto market by steering some towards smaller vehicles and fueling the rapid ascent of Chinese automakers that often offer feature-rich options at lower prices.

Implications

- As affordability reshapes vehicle preferences, automakers may need to rebalance portfolios toward smaller, lower-cost segments in some markets.
- Challenger brands are resetting expectations of value, pushing incumbents to sharpen their propositions. Beyond the upfront purchase price, value can be created through a compelling total cost of ownership, from lower operating and maintenance costs to stronger resale value.
- As AI becomes a gateway to vehicle discovery and comparison, automakers will need to pair competitive products with visibility in AI-generated recommendations.

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Value remains king, but price sensitivity has soared amid elevated financial pressure

Consumers face renewed inflation concerns as geopolitical tensions drive commodity prices higher

XX% of global consumers agree

"For me, the most important thing about a brand is that it offers good value for money"

#XX life attitude on a list of 41 life attitudes consistently measured, unchanged from 2019

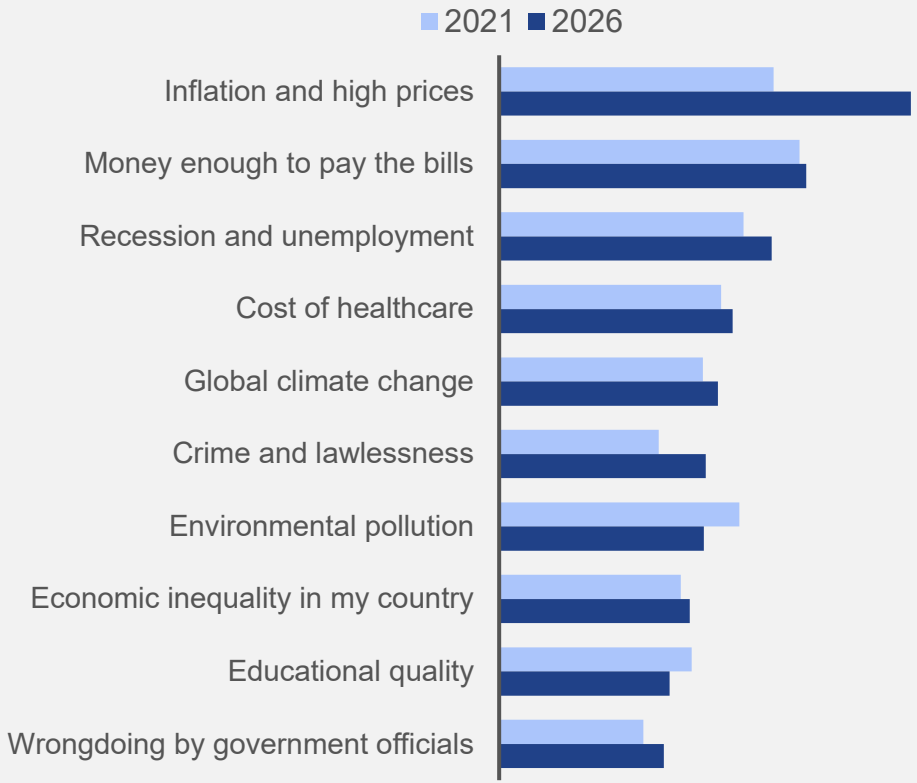
XX% of global consumers agree

"Price is the most important factor in my purchasing decisions"

#XX life attitude,
↑XX ranks from 2019

Economic concerns increasingly top of mind

% of global consumers citing the following as top personal concerns, top 10 in 2026 on a list of 24 concerns

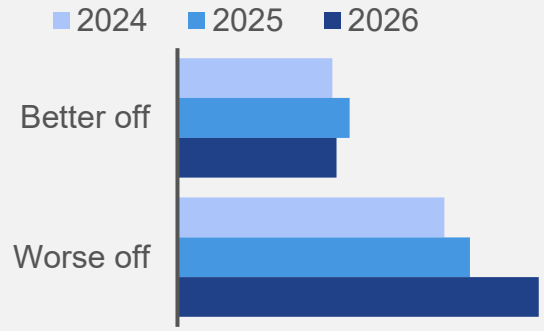


Household finances worsen amid soaring prices

"World Bank sees commodity prices up 23% in 2026 due to Middle East war, other shocks

—Reuters, Oct. 2026

% of global consumers saying that their household is better or worse off financially compared with a year ago



NIQ Consumer Life Global 2019 and 2026, ATL, A2 (global = core 18 countries), NIQ 2026 Consumer Outlook, Global, vs. previous studies, World Bank sees commodity prices up 23% in 2026 due to Middle East war

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In the world of cars, affordability is ever more desired, but can be difficult to find

New vehicle prices have risen sharply in US and Europe but fallen dramatically in China, widening the global affordability divide

XX% of global consumers agree

"I want the cheapest, easiest-to-maintain vehicle"

XX% of American consumers agree

"I want the cheapest-to-maintain vehicle I can find"

↑XX pts from 2021, making it the ***fastest-growing*** auto attitude on a list of 47 consistently measured since 2021

XX% of global consumers*

plan to postpone their next vehicle purchase because of financial constraints

As of early 2026, new vehicle prices in the US and Europe have increased sharply—rising on average by 15–25% since 2020—driven by inflationary pressures, semiconductor scarcity, raw material cost surges, and supply chain constraints.

Elevated cost of ownership reshapes the US auto market

$51,109 The average transaction price for new vehicles in Oct. 2026, a record high

$787 The average monthly payment on financed new-vehicle purchases as of Q3 2026, a record high

Buyers with annual income over $150,000 now account for 43% of new-car sales in the US, versus 29% in 2020. Meanwhile, buyers with income below $100,000 accounted for 36% of new-car sales in 2026 year to date, versus 50% in 2020.

China stands in stark contrast to the west: Vehicle prices across China have fallen by approximately 20% since the start of 2023 as manufacturers aggressively slash prices to fight for market share in a shrinking domestic pie.

NIQ Consumer Life Global 2025, D12 (global = 40 countries); MRI-Simmons 2021 and 2026 Summer; *data from the McKinsey Mobility Consumer Pulse 2026 Survey of more than 20,000 mobility users across China, Germany, Japan, the United Kingdom, and the United States; How consumers are reshaping the future of mobility, The average cost for a new vehicle in the U.S. hits a record high: over $51,000, New-car financing records pile up in Q3 as buyers borrow more and stretch loans longer, Cox raises 2026 new car sales forecast, China's car industry is wowing the world—but crashing at home

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Vehicle affordability is driving interest in smaller vehicles

Even Americans who traditionally favor large SUVs and pickups are gravitating toward sedans, compact SUVs, and value-focused minivans

XX%

of global consumers*

will consider **smaller vehicle** categories than originally planned to remain within budget



The Fiat Grande Panda, a sub-compact crossover-styled hatchback launched in 2025, quickly gained popularity and became one of the best-selling cars in Italy.

Americans re-consider vehicle footprint amid elevated vehicle and gas prices

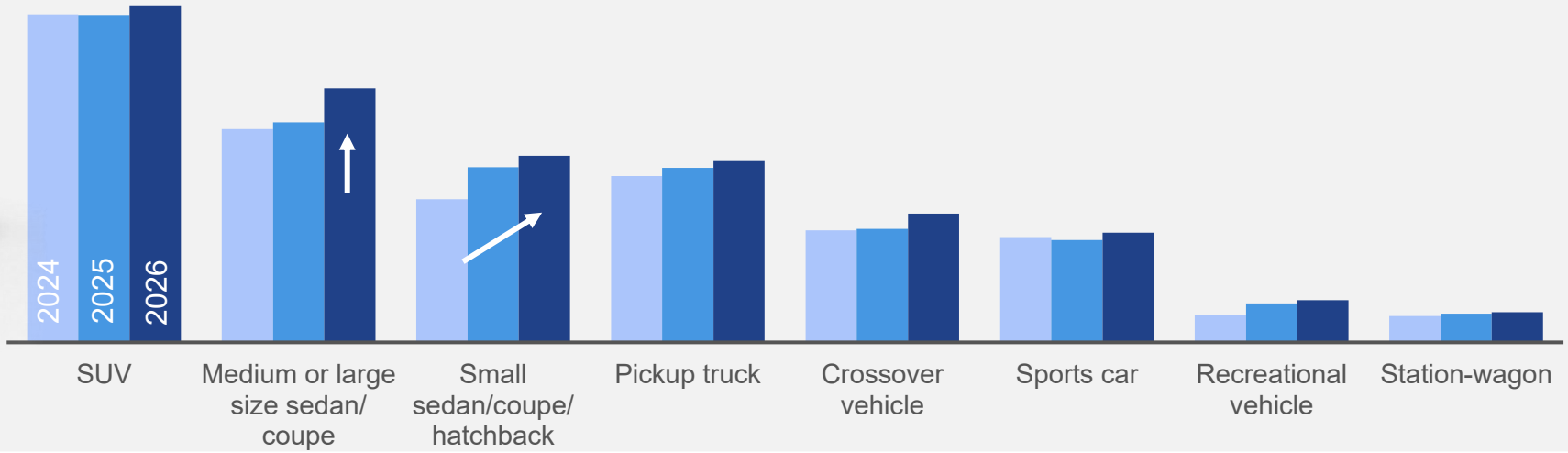
> Americans are learning to love smaller cars as gas pump pain deepens
>
> —The Independent, Oct. 2026

> US sedan sales are surging, with Honda and Toyota leading the charge
>
> —Car and Driver, Oct. 2026

> Sales of hulking pickups and SUVs sag as fuel prices soar
>
> —New York Times, Oct. 2026

> Minivan sales surge 21% in 2025 as Millennial dads lead demand for cars offering the 'best bang for your buck'
>
> —Yahoo News, Feb. 2026

% of American consumers seriously considering buying the following in the next 3 years



NIQ Consumer Life US 2024-2026, D43; Fiat outpaces rivals with massive European sales jump, Americans are learning to love smaller cars, Sales of hulking pickups and S.U.V.S sag. Sedan sales are surging, Minivan sales surge 21% in 2025, How consumers are reshaping the future of mobility; *data from the McKinsey Mobility Consumer Pulse 2026 Survey of more than 20,000 mobility users across China, Germany, Japan, the United Kingdom, and the United States

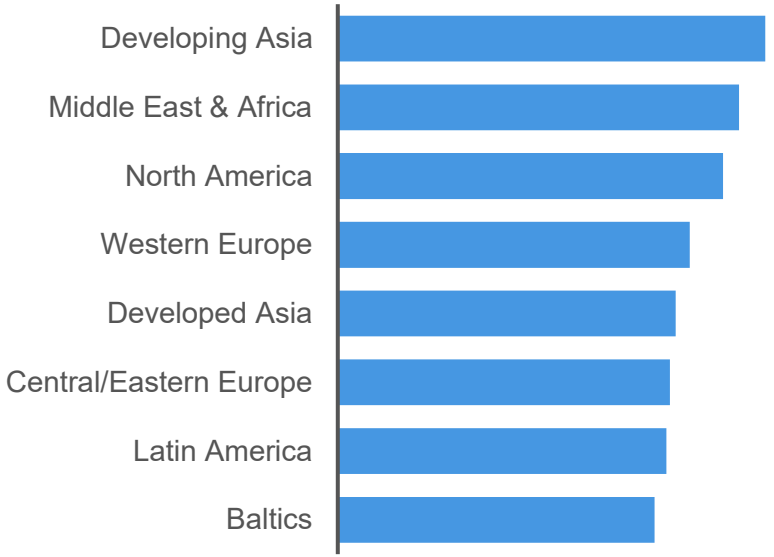
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Consumer pragmatism is reshaping the global auto industry

Consumers prioritize fit and value over brand origin, helping fuel the meteoric rise of Chinese automakers overseas

XX% of global consumers

plan to buy the vehicle that **best meets my needs, no matter who makes it or where it is produced**

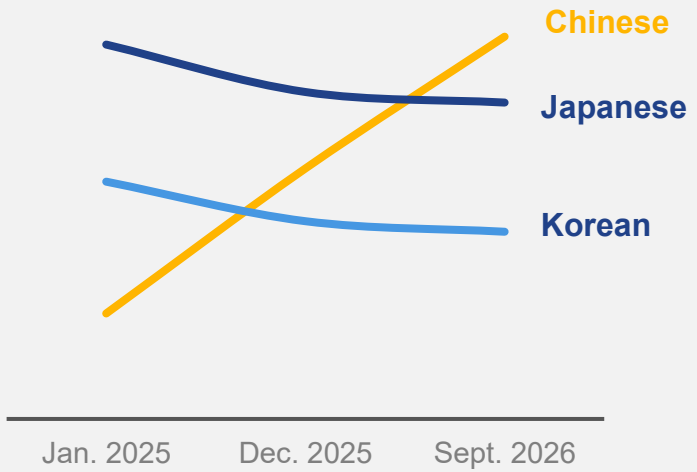


China's total overseas vehicle sales are projected to reach a record **XX million units** in 2026, up XX% from XX million units in 2025.

Chinese automakers overtook Japanese brands in Europe's automotive market for the first time on a quarterly basis, capturing XX% of the European market in Q3, 2026, compared with XX% for Japanese manufacturers. It's up from XX% five years earlier.

Their share climbed to a record XX% in September, more than twice the XX% held by South Korean brands.

Europe auto market share by brands of origin, %



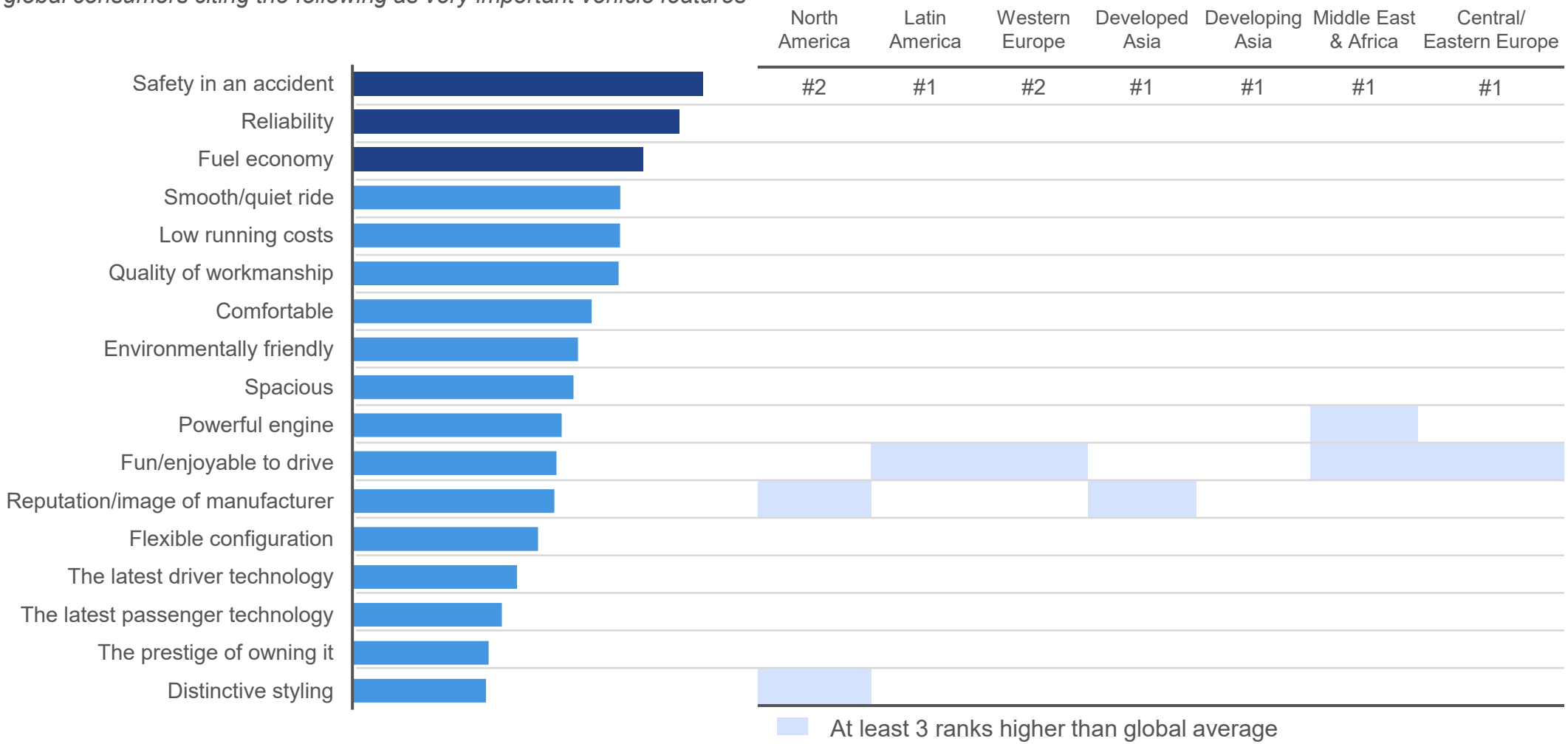
NIQ Consumer Life Global 2025, D12 (global = 40 countries), China's carmakers eye record 12 million overseas sales in 2026, Chinese automakers overtake Japan in Europe, challenge Hyundai

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Across the globe, practical benefits are the most fundamental in vehicle choices

Safety, reliability, and fuel economy well outweigh prestige and style across regions

% of global consumers citing the following as very important vehicle features



NIQ Consumer Life Global 2026, D08 (global = 39 countries)

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