Private Benefits of Personal Motorised Transport

Regional Fact Sheet — North America | FIA - 2026

1. Global findings at a glance

Cars and motorcycles are the backbone of personal mobility worldwide. The report draws on evidence across all continents to document the private benefits of car and motorcycle use, and to make the case for a more balanced policy debate that goes beyond external costs.

Continued global growth, driven by emerging economies

The **global passenger car fleet grew by +16%** between 2018 and 2023, reaching 1.25 billion vehicles. **Motorcycles grew even faster at +25%,** to 726 million. Growth was concentrated in lower- and middle-income regions: South Asia (+33%), East Asia (+32%) and South-East Asia (+30%) led on passenger cars, while Sub-Saharan Africa recorded the steepest motorcycle growth (+56%). This follows a well-documented **S-shaped relationship** between income and motorisation: where incomes rise and constraints are modest, people rapidly adopt first motorcycles, then cars. In emerging economies, two-wheelers serve as a transitional pathway: a strong signal of demand for individual motorised mobility even before car ownership becomes widespread.

Superior access to services, activities and employment

Private motorised transport generally outperforms public transport in providing access to essential services and jobs, across all continents and income contexts. The gap is largest in rural areas and smallest in dense metropolitan areas with well-developed networks. Key global benchmarks from the study:

- **Car access is a driver of employment and economic opportunity.** 50× more jobs accessible by car than by public transport in US metropolitan areas; 10× in Europe, 15× in China, 5× in Canada and Australia. Access to a car is a significant predictor of employment outcomes. A meta-analysis of 93 studies finds a **positive association** between car ownership and individual employment probability, particularly among welfare recipients and in areas with limited public transport alternatives. In lower-income countries, improved transport infrastructure and access to private motorised transport are strongly linked to better job matching, productivity and structural economic transformation. In Africa, each kilometre closer to a main road increases the probability of having a job by 2.1–2.6%.

- **Healthcare accessibility**. Globally, under universal motorised transport availability, 60% of the world's population would live within 10 minutes of a healthcare facility.

Substantial and measurable consumer value

The economic value of car travel is large, and larger than what people actually spend on it. Households consistently devote a significant share of their income to private transport, which itself signals that the benefits of car ownership are worth at least as much as the costs. Where researchers have been able to estimate the full consumer value, the evidence suggests that willingness to pay exceeds actual spending, meaning the true value of car mobility is systematically higher than what expenditure data alone would suggest.

The cost of limited access: mobility deprivation and quality of life

The importance of private mobility is further evidenced by what happens in its absence. In high-income countries, 15–40% of the population does not fully benefit from car access (due to income constraints, age or health) with direct consequences on mobility, employment and wellbeing. In the US, transportation insecurity is the most commonly experienced form of material hardship, cited by 19% of Americans, ahead of food insecurity (16%) and housing insecurity (9%). In rural areas, carless households earn 64% less than car-owning counterparts. In the Global South, the shares without adequate transport are higher still, and the link between road infrastructure and poverty reduction is well established.

The accessibility paradox

Private motorised transport consistently provides the best individual accessibility, but the best overall accessibility is found in cities with dense land use, good public transport and room for active modes. The explanation lies in land use: car-oriented development encourages urban sprawl, reducing proximity and ultimately lowering accessibility for everyone, including car users. This does not diminish the private benefits of car ownership; it underscores that maximising those benefits at a societal level requires a balanced transport policy combining private motorised transport, public transport, active modes and density.

North America – Vehicle stock trends and accessibility indicators

NORTH AMERICA

Key mobility and access indicators, 2018–2023

1 VEHICLE STOCK TRENDS, 2018–2023

215.2M
Passenger cars, 2023
Up from 210.2M in 2018 (+2.3%)

+9.8%
Motorcycle growth
9.4M → 10.4M, 2018–2023

17.2%
Share of global car fleet
Down 2.3 pp from 2018

~0.05
Motorcycle-to-car ratio, 2023

North America remains a strongly car-dominant region.

2 ACCESS TO JOBS AND MOBILITY DEPRIVATION

ACCESS TO JOBS (within 30 minutes)

Jobs accessible by car vs public transport

UNITED STATES

vs

~50x
more jobs by car than by public transport

CANADA

vs

~5x
more jobs by car than by public transport

MOBILITY DEPRIVATION (United States)

8.6%
US households with no car access

6.2%
US population with no car access

70 million
People with car deficit status (fewer than 1 car per adult)

23%
US population with car deficit status

19%
Americans experiencing transportation insecurity

Rural areas face the sharpest impact:

–64%
Income gap for car-less rural households vs rural households with a car

Real alternatives to car use in rural areas are nearly non-existent.

3 CONSUMER VALUE AND RURAL MOBILITY CHALLENGE

CONSUMER VALUE OF CAR OWNERSHIP

USD 11,200 / year
Average value of car ownership

Largest component linked to non-use value

RURAL MOBILITY CHALLENGE

Low-density settlement makes personal motorised transport structurally indispensable outside urban cores.

Real alternatives to car use in rural areas are nearly non-existent.

Cars expand access and are highly valued, while mobility deprivation and rural gaps remain significant challenges in North America.

2. North America: regional deep dive

Vehicle stock trends, 2018–2023

North America is one of the clearest examples of passenger-car market saturation. The region already has one of the world's largest passenger-car fleets, but growth between 2018 and 2023 was limited compared with other regions.

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Share of global car fleet
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Country / territory	Car change 2018-2023*	Car change %	Moto change 2018-2023*	Moto change %	Moto/car change %
Bermuda	+746	+3.2%	-424	-2.0%	-5.1%
Canada	+650,027	+3.7%	+74,053	+10.0%	+6.0%
Greenland	+1,914	+39.8%	+2	+100.0%	+43.1%
United States	+4,278,088	+2.2%	+850,725	+9.8%	+7.4%

Passenger cars increased from 210.2 million in 2018 to 215.2 million in 2023 (+2.3%), the lowest regional growth rate in the dataset. As Asian regions expanded rapidly, North America's share of the global passenger-car fleet fell to 17.2%, down by 2.3 percentage points from 2018.

Motorcycles and mopeds also grew modestly, from 9.4 million to 10.4 million vehicles (+9.8%). The motorcycle-to-car ratio remained very low, at around 0.05 in 2023. This confirms that North America remains a strongly car-dominant region, where passenger cars are the central mode of private motorised mobility.

Access, employment and mobility deprivation

North America provides some of the strongest evidence in the report on the private benefits of car access and the consequences of limited access.

- Across US metropolitan areas, the report finds that around 50 times more jobs are accessible by car than by public transport, the highest car-to-public-transport job accessibility ratio among the regions covered by the global benchmark. This reflects the interaction between car-oriented land use, low-density settlement patterns and weaker public transport alternatives outside the densest urban cores.
- In Canada, the same ratio stands at approximately 5 times. This potentially reflects higher urban density, stronger public transport networks in major metropolitan areas, and more compact land-use patterns compared to US cities, illustrating how context shapes the relative advantage of private motorised transport even within the same high-income region.
- The cost of limited car access is also particularly visible in the United States. According to the report, 8.6% of US households, corresponding to 6.2% of the US population, have no car access. A broader group, around 70 million people or 23% of the US population, has car deficit status, meaning that the household has fewer than one car per adult.
- Transportation insecurity is reported as the most commonly experienced form of material hardship in the US, affecting 19% of Americans, ahead of food insecurity, unmet medical need and housing insecurity. Rural areas show the sharpest consequences: car-less rural households earn substantially less (-64%) than rural households with a car, and the report notes that real alternatives to car use in rural areas are nearly non-existent.

Consumer value and household spending

The North American case also illustrates that the private value of car ownership is not limited to actual trips. The report cites an estimate for the United States according to which the average value of car ownership is around USD 11,200 per year, with the largest component linked to non-use value.

The rural mobility challenge

US's low-density settlement pattern makes personal motorised transport structurally indispensable outside urban cores. In North America's rural areas, real alternatives to car use are nearly non-existent. Sources cited in the report point to an equity tension in the US mobility system: car access is often essential for full participation in society, yet policy support is less developed for households that lack access to a vehicle than for the wider system of car use once vehicle ownership has already been secured. This creates a relevant advocacy angle for FIA Member Clubs, particularly around affordability, basic mobility access and targeted support for low-income households.