



# Let's Roll!

Transportation in my  
community and in the EU



a 1-2 class period investigation





# Goals of this lesson:

- **Compare students' own culture to the culture of the EU.**
    - Identify similarities and differences
    - Identify factors that may influence culture
    - Understand that cultural differences are not 'good / bad' or 'right / wrong', they are just different.
  - **Evaluate the benefits and drawbacks of different forms of transportation**
  - **Understand that groups have different needs**
    - Identify the needs of several different groups
    - Evaluate factors that may lead to different needs
    - Recognize the EU must balance the interests and needs of all 27 member states
  - **Understand some principles of statistics and surveys**
    - sample size impacts reliability
    - statistical significance - not all differences are statistically meaningful
- 
- 



# Resource Links



## Lesson files and student handouts

[Google folder with all files](#)  
[Student survey Google Form](#)  
[Student Handout](#)

[Bulgaria Fact Sheet](#)  
[Cyprus Fact Sheet](#)  
[Netherlands Fact Sheet](#)

[Railways in the EU video](#)  
[Transport of the Future Video](#)

## Sources

[Eurobarometer website](#)  
[Eurobarometer report: Mobility and Transport](#)  
[Report summary](#)

[Council of the EU Youtube Channel](#)  
[European Commission Youtube Channel](#)





# NC Standards & Benchmarks

## 7th grade Social Studies



I.1.3 Analyze details, central ideas and inferences from sources using discipline-specific strategies.

I.1.5 Identify evidence that draws information from multiple perspectives.

I.1.10 Identify challenges and opportunities created in addressing local, state, tribal, regional, national, and/or global issues.

I.1.11 Use a range of civic approaches to address problems being investigated.

7.B.1.1 Compare major elements of culture in various modern societies around the world.

7.C&G.1.3 Deconstruct changes of various modern governments in terms of the benefits and costs to its citizens.

7.C&G.1.4 Summarize new ideas that changed political thought in various nations, societies and regions.

7.E.1.2 Explain how national and international economic decisions reflect and impact the interdependency of societies.

7.G.1.2 Explain reasons why societies modify and adapt to the environment.



7.H.1.3 Compare individual and societal responses to globalization in various regions and societies.

7.H.1.4 Critique the effectiveness of cooperative efforts and consensus-building among nations, regions, and groups from various perspectives.





# Instructions for the teacher

1. Make a copy of [this google form](#), and administer it to your students. (The google survey is an abbreviated version of the EU survey on mobility and transport)
  2. On applicable slides, copy and paste the relevant results from your class google survey. ([click here for a tutorial](#))
  3. Have students complete the [student handout](#) as they view the slideshow. This step can be completed individually or as a class.
  4. Discuss. Suggested discussion points are on the next slide.
- 
- 



# Discussion points for the teacher

## Points to keep in mind during the discussion, and suggested student prompts

### Discussion questions related to Cultural Comparison and Differing Opinions

- How do opinions about transportation in the EU compare to attitudes in our community? What are some possible reasons for this? Encourage students to consider a variety of factors such as cost, availability, infrastructure, convenience, climate, topography, health, environmental impact, and tradition.
- Discuss the idea of 'sample size'. What is the sample size of the EU survey? What is our sample size? How might the sample size impact survey results?
- Do you think our community results would change if we surveyed more people? What if we surveyed our parents? Other demographic groups? Our state? Our nation?
- Based on the survey results, what are some problems related to transportation? How is the EU addressing these problems? Are there problems the EU should focus more on?





# Discussion points for the teacher

## Discussion questions related to different opinions

- What concerns do people have regarding daily transportation? What factors impact these concerns? Help students make connections between needs and transportation choices. For example:
  - Bulgaria is a poorer country and has many walking paths. Therefore, less people drive and more people walk and use urban public transport.
  - Cyprus does not have train or subway service and a more rural population. Driving is the only option for many people.
  - The Netherlands is very flat and has a cooler climate. It is highly urban and has many bike paths and bike lanes. Therefore, more people ride bikes.
- How does the EU address these different needs and opinions?
- Why would the EU want to know the information in the survey? Specifically, why might they ask people about their opinions on:
  - why they use their main mode of transportation?
  - what might prevent people from using greener transportation?
  - Whether people receive home deliveries, and how they might change these habits?



# Let's Roll!

Transportation in my  
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Part 1: Cultural Comparison

Student Presentation begins on Slide 8



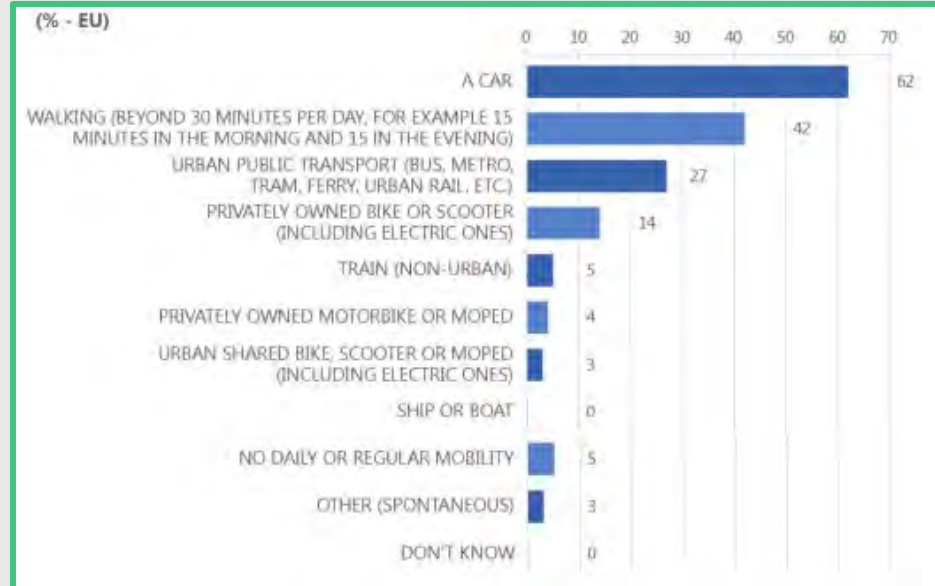


# On a typical day, what modes of transportation do you use?

## Our Class

Insert your class results here

## The EU



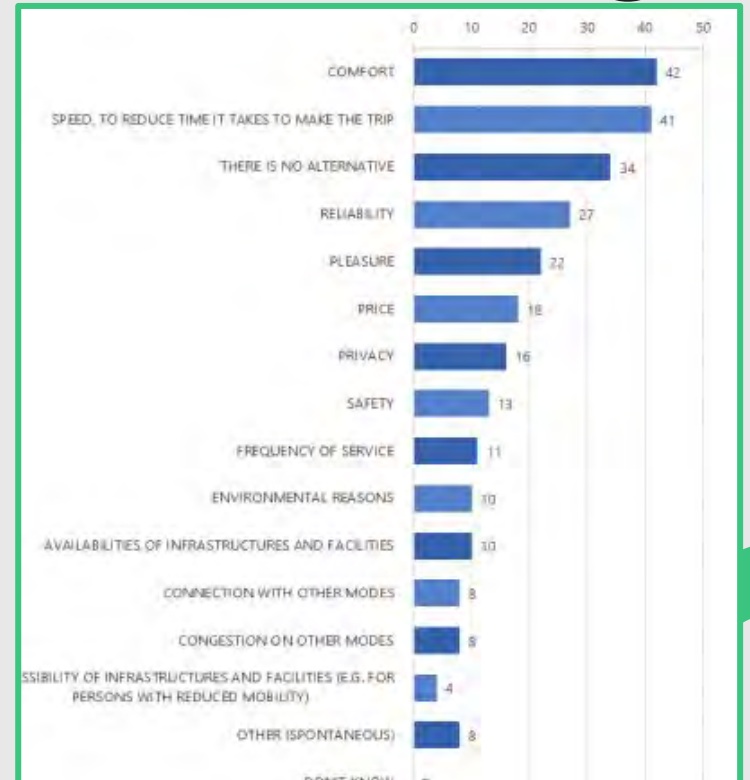
# Why do you use these modes of transportation?

## Our Class

Insert your class results here



## The EU



# Would you switch from a car to more environmentally friendly transportation?

## Our Class

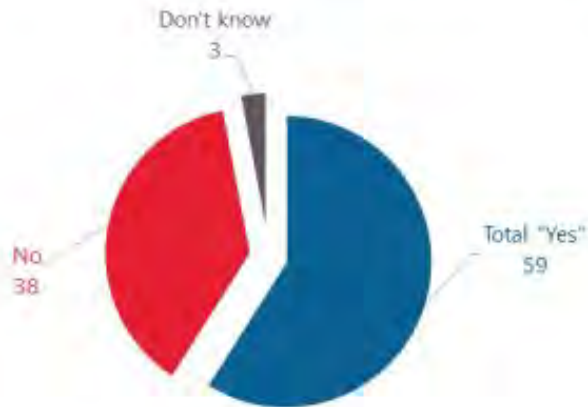
Insert your class results here



## The EU



**QA5** Would you be ready to switch a significant part of your daily mobility to more environmentally friendly modes of transport (e.g. ride-sharing, zero-emission vehicles, public transport, cycling or walking)? (% - EU)



(Sept 2019)

Base: all respondents who use cars other than zero-emission cars (n= 16,717)

# What would make you ready to switch away from your car?

## Our Class

Insert your class results here

## The EU

QA6T Under what conditions would you be ready to switch to more environmentally friendly modes of transport? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



# Part 2: Problems & Solutions

What  
transportation  
problems do  
we need to  
solve?





# Railways in the EU



“The European Union is reforming its rail sector...to become more attractive, innovative and competitive.”

# Transport of the future



Council of the  
European Union

“What if, by 2050, people  
and goods would move  
100% carbon-free?”

[#EU2050](#)

[#ClimateActionEU](#)



## Part 3: Opinions in Different EU Member States

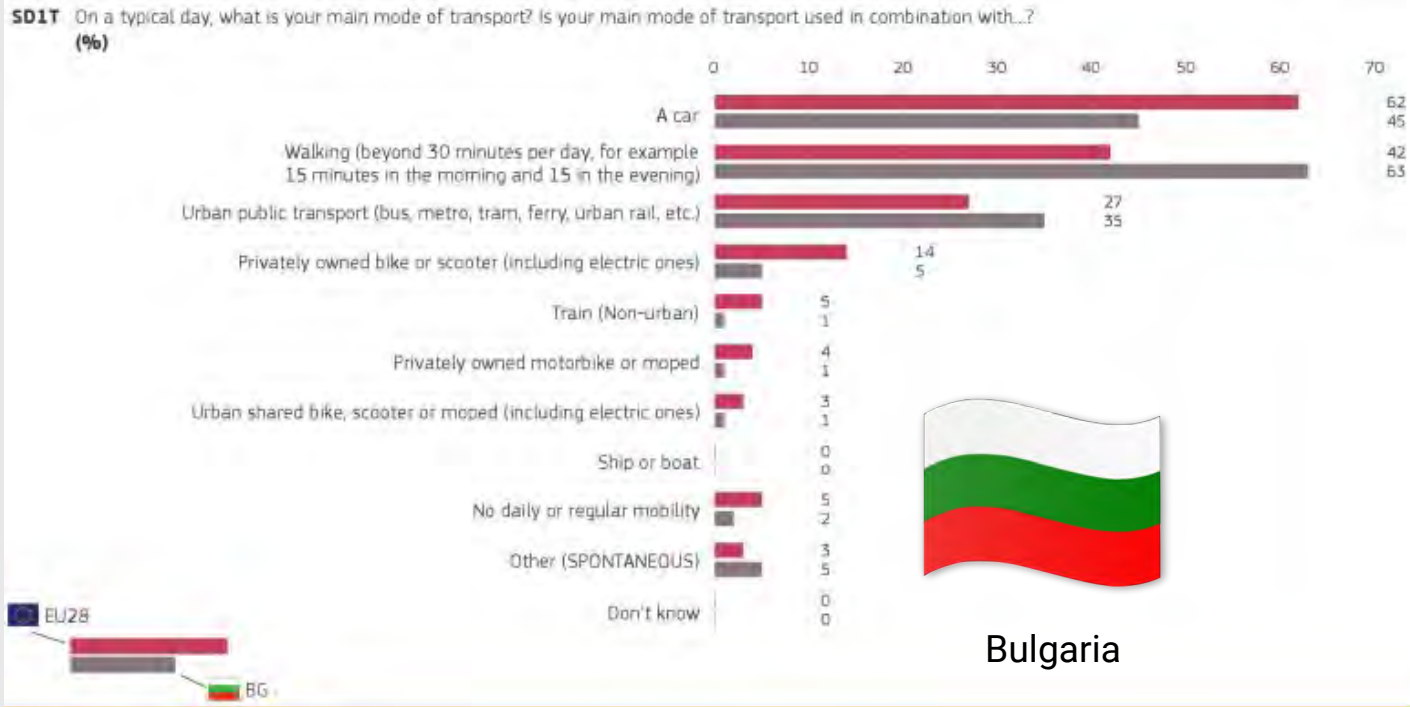


Now let's examine the answers  
for question #1 for different  
EU Countries.



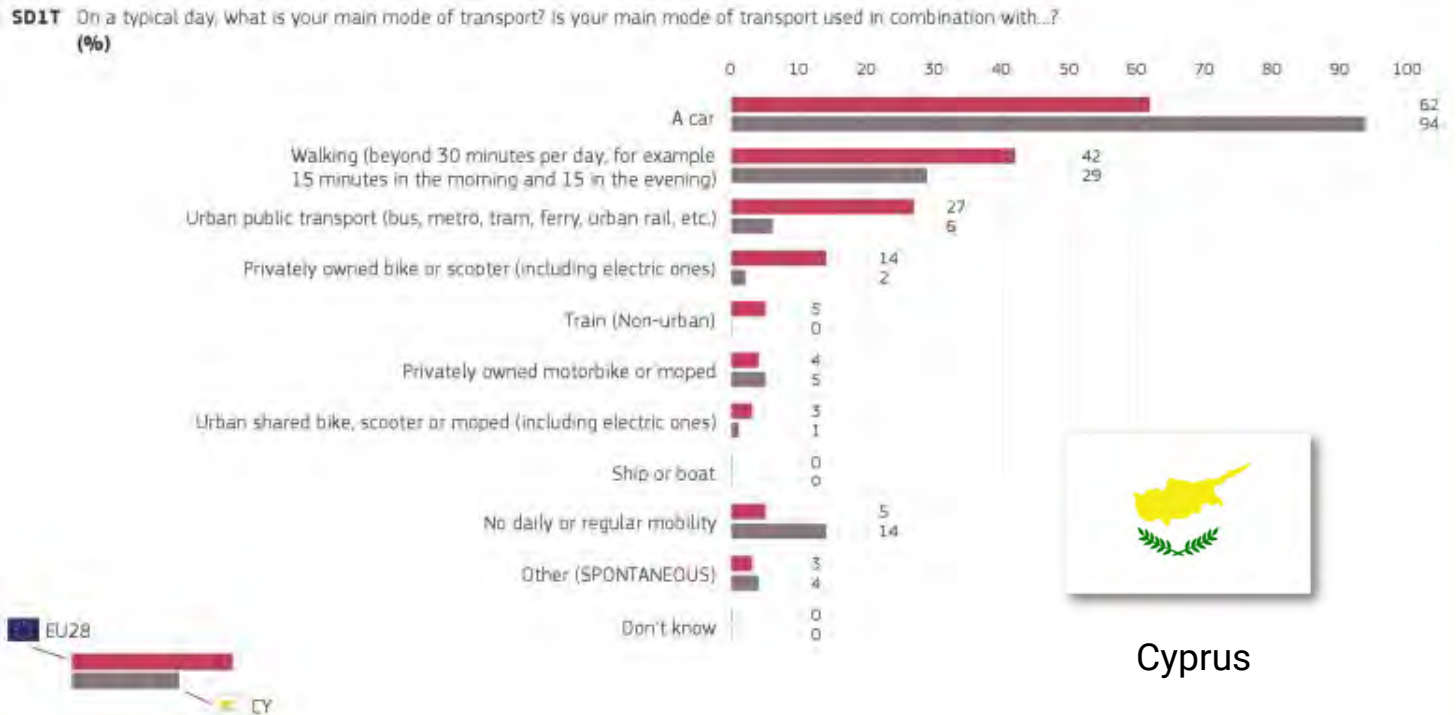
# On a typical day, what modes of transportation do you use?

**Key:** Red line : All of the EU  
Grey Line: Bulgaria



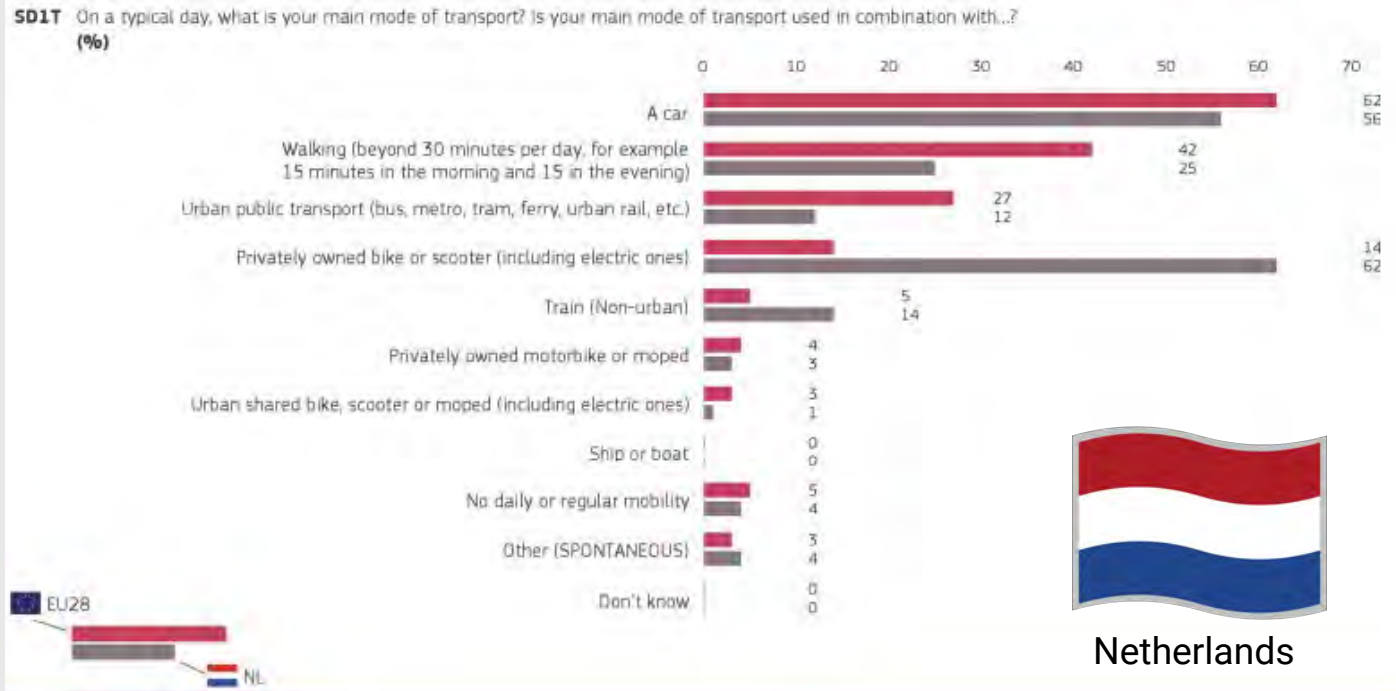
# On a typical day, what modes of transportation do you use?

Key: Red line : All of the EU  
 Grey Line: Cyprus



# On a typical day, what modes of transportation do you use?

**Key:** Red line : All of the EU  
Grey Line: The Netherlands



# Bicycle Parking outside a Belgian Train station



# Conclusions

1

The European Union (EU) is a coalition of 27 member states

2

The member states work together to solve common problems

3

The EU must consider the needs of all 27 member states

Transportation choices are influenced by factors, including cost, availability, geography, environment, & tradition

6

Cultural differences are not 'good' or 'bad' - they are just different

5

Looking at other cultures can help you understand yourself better as you learn new perspectives.

4

# Thanks



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**MEET EU**

*an initiative by*  
**UNC-Chapel Hill**  
**University of Pittsburgh**  
**Florida International University**



EUROPEAN UNION

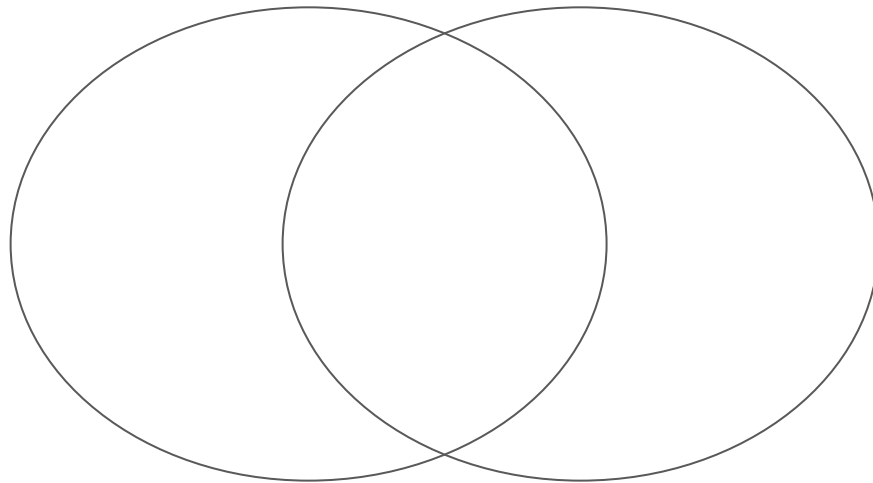
Name: \_\_\_\_\_ Class: \_\_\_\_\_



# Let's Roll! Transportation in my community and in the EU

## Part 1: Cultural Comparison

As you examine the slides comparing your community with the EU, complete the Venn Diagram to show which opinions about transportation your community shares with the EU and which are different.



My community

The EU

What observations or conclusions can you draw from this evidence?

- 1.
- 2.

How might sample size (the number of people answering the survey question) impact these results?

## Part 2:

Based on your work in part 1, list a few problems related to transportation.

- 1.
- 2.
- 3.

Watch the two videos. How is the EU addressing the problems you identified?

What should the EU add to its transportation plan?



# Let's Roll! (continued)



## Part 3: Different Needs, Different Opinions

Examine the slides answering question #1 for Bulgaria, Cyprus, and the Netherlands, and complete the chart.

Country	What is the most common form of transportation here?	Brainstorm: What are some possible reasons this is the most common?	Now look at each country sheet (linked at left). What reasons did citizens give for their transportation choices?	What could the EU do to help citizens of this country use greener transportation?
Bulgaria <a href="#">Bulgaria Fact Sheet</a>				
Cyprus <a href="#">Cyprus Fact Sheet</a>				
Netherlands <a href="#">Netherlands Fact Sheet</a>				

**Looking Forward:** What could be done to improve transportation in your community? Why would this be a good initiative?

# Let's Roll - student survey

1. Name:

---

2. Class Period

---

3. On a typical day, what modes of transport does your family use? (choose all that apply)

*Check all that apply.*

- a car
- walking
- city transportation (city bus, subway, etc.)
- bike or scooter
- motorcycle or moped
- a train
- school bus
- ship or boat
- Other: \_\_\_\_\_

4. What are the reasons you use these types of transportation?

*Check all that apply.*

- comfort
- speed / reduced time to make the trip
- there is no other choice
- pleasure
- price
- reliability
- privacy
- safety
- frequency of service
- environmental reasons
- Other: \_\_\_\_\_

5. What are the biggest challenges with daily transportation? (Choose up to 4)

*Check all that apply.*

- cost of transport
- congestion
- availability and connectivity
- damage to the environment
- quality of service in public transport
- safety (i.e., accidents)
- quality of infrastructure
- health impacts
- availability of bike paths / sidewalks / etc
- crime
- Other: \_\_\_\_\_

6. Would you be ready to switch from using a car to using a more environmentally friendly mode of transportation (ride sharing, electric car, public transportation, biking, or walking?)

*Mark only one oval.*

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- don't know

7. What could convince you to switch from using a car to using a more environmentally friendly mode of transportation? (choose up to 4)

*Check all that apply.*

- If it is not more expensive
- If it is available
- If it is as fast
- If it is convenient
- If the infrastructure meets your needs
- If it is as safe
- If the quality of service is as good
- I am already ready to switch
- Nothing would make me ready to switch
- Other: \_\_\_\_\_

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Google Forms

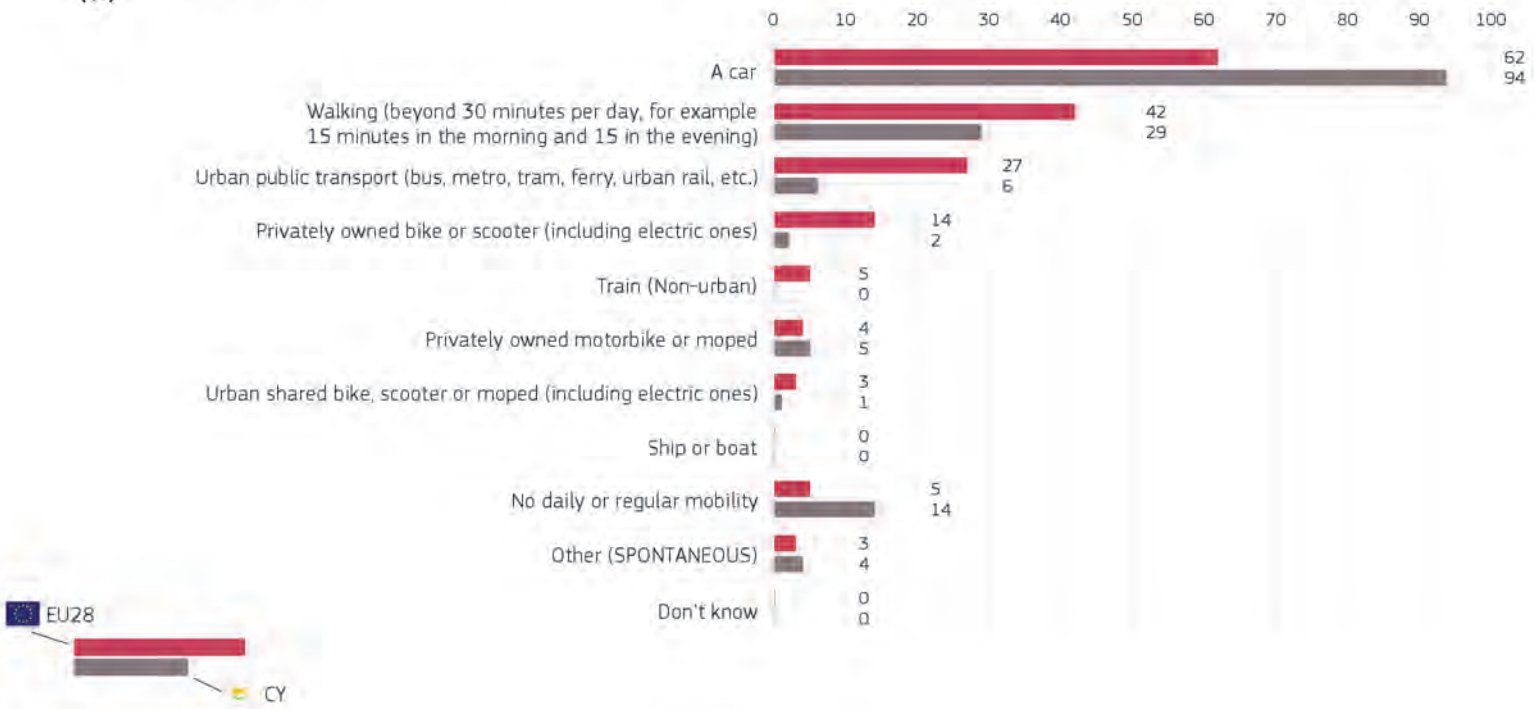
27,565 interviews  
11 > 29 / 09 / 2019

504 interviews  
11 > 20 / 09 / 2019

Methodology: face-to-face

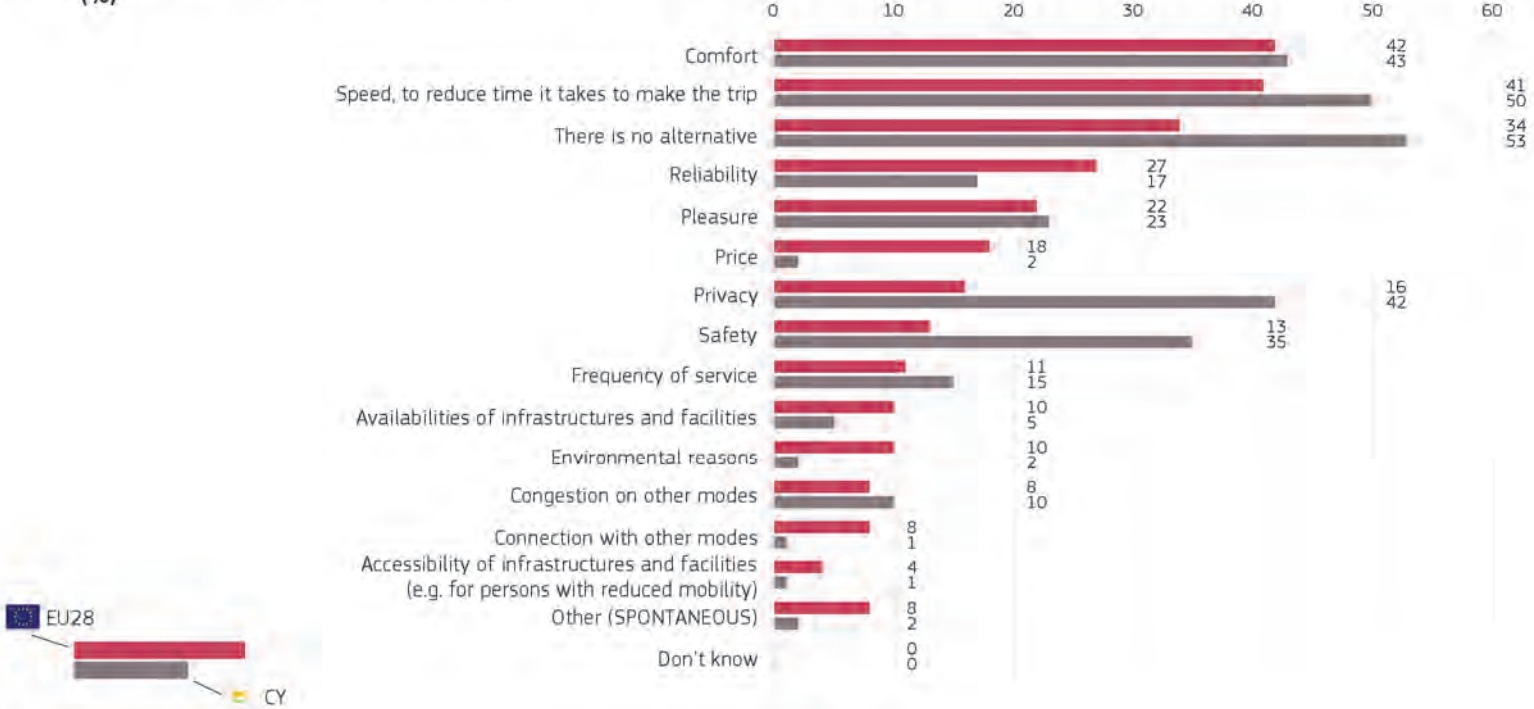
1. DAILY MOBILITY IN THE EU

**SD1T** On a typical day, what is your main mode of transport? Is your main mode of transport used in combination with...? (%)



Base: all respondents who have a daily or regular mobility (n=26.864)

**QAOT** What are the reasons for using this main mode of transport? Firstly? And then? (MAX. 4 ANSWERS) (%)



Base: all respondents who mentioned their main mode of daily transport (n=26.747)

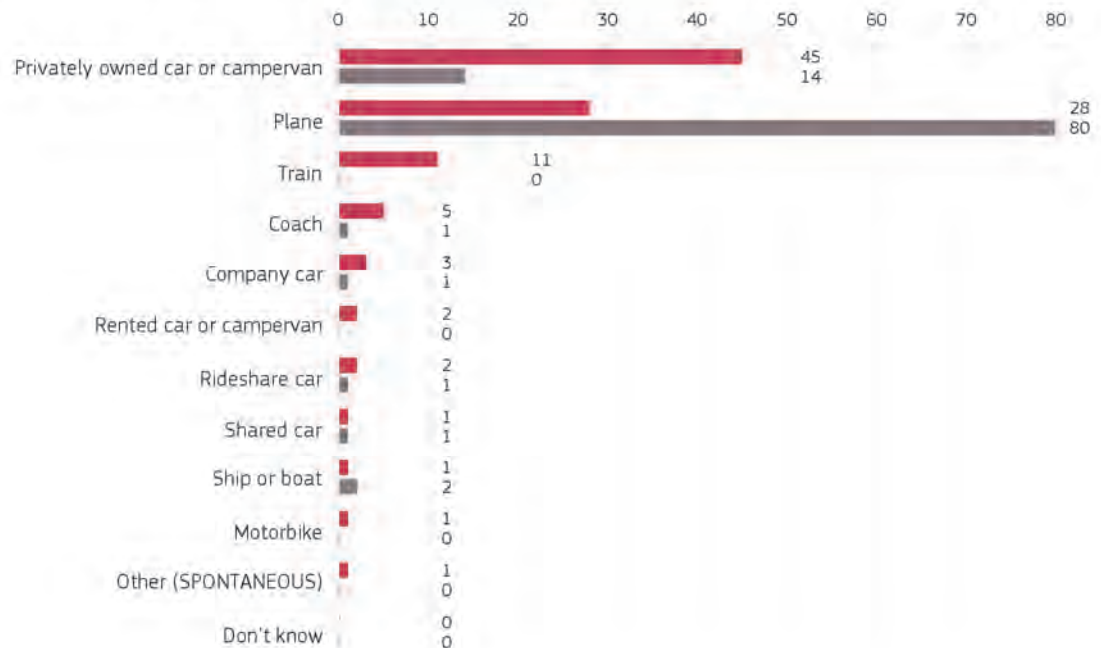
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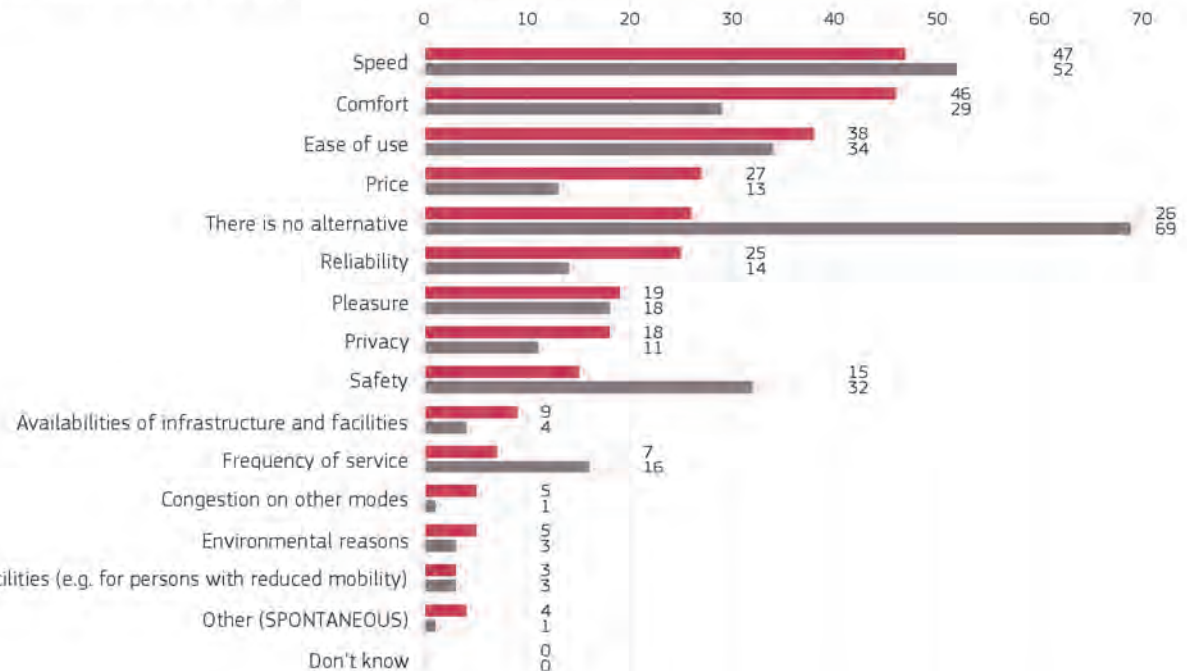
## 2. LONG DISTANCE MOBILITY

**QA12** What is the mode of transport you use the most for those long-distance journeys (300 km or more)? (%)



Base: respondents who have made journeys of 300km or more in the last 12 months (n=17.106)

**QA13T** What are the reasons for using mostly this mode of transport? Firstly? And then? (MAX. 4 ANSWERS) (%)



Base: respondents who have made journeys of 300km or more in the last 12 months and mention their main mode of transport (n=17.078)



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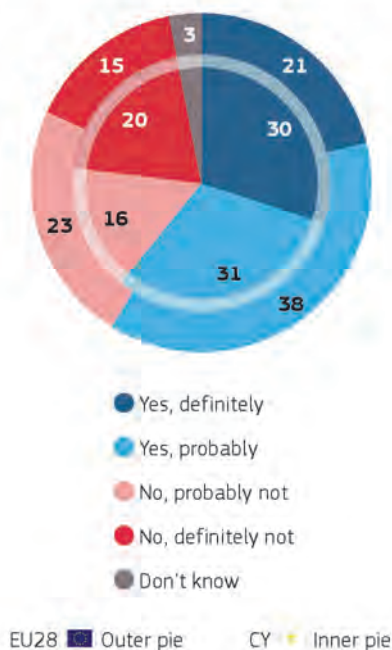
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Republic of Cyprus

### 3. SUSTAINABILITY - READINESS AND CONDITIONS TO SWITCH

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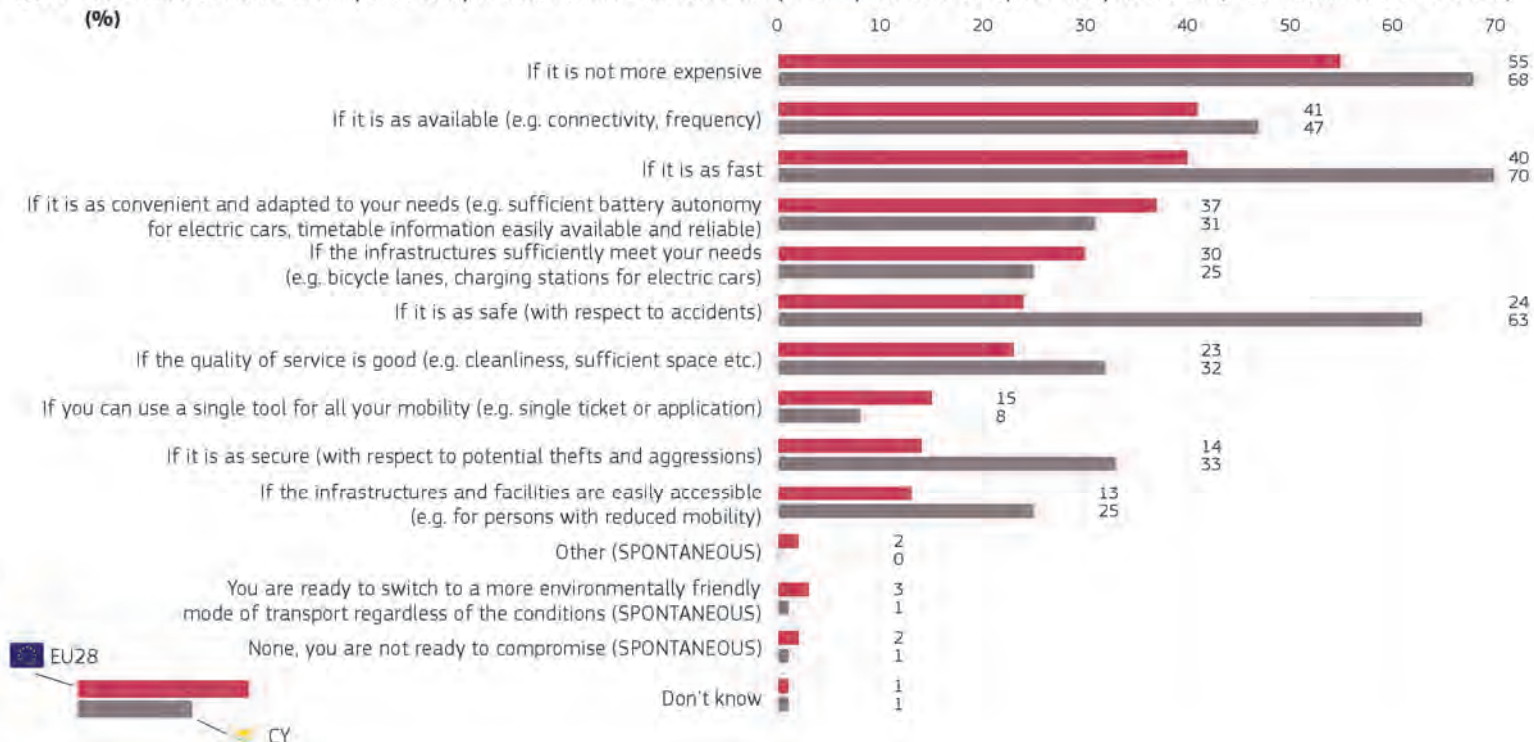
Answer: Total 'Yes'

	EU28	CY
TOTAL	59	61
<b>Age</b>		
15-24	70	73
25-39	61	62
40-54	62	66
55+	53	51
<b>Education (End of)</b>		
15-	41	57
16-19	55	56
20+	68	65
Still studying	74	74
<b>Subjective urbanisation</b>		
Rural village	55	64
Small/ Mid-size town	61	62
Large town	63	57

Base: all respondents who use cars other than zero-emission cars (n=16.717)

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**QA6T** Under what conditions would you be ready to switch to more environmentally friendly modes of transport? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE) (%)



Base: respondents who would be ready to switch to more sustainable modes of transport (n=9.877)

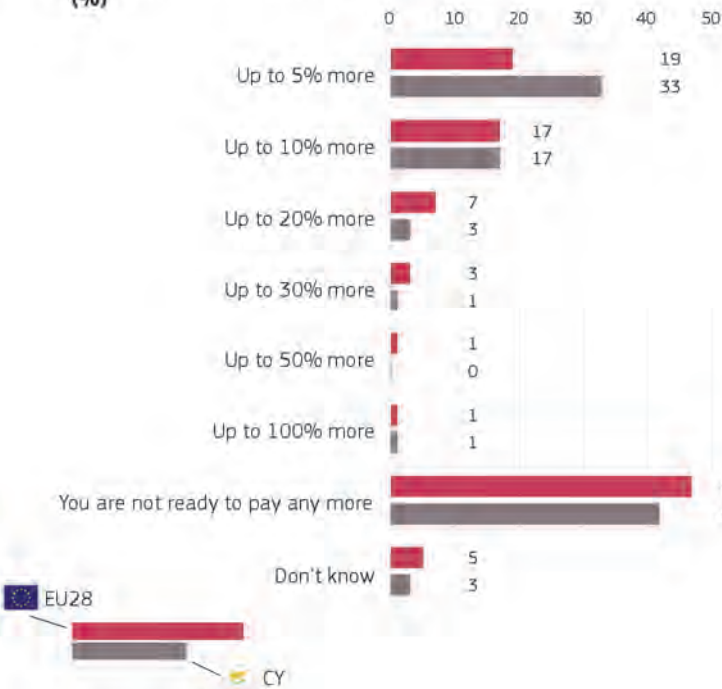
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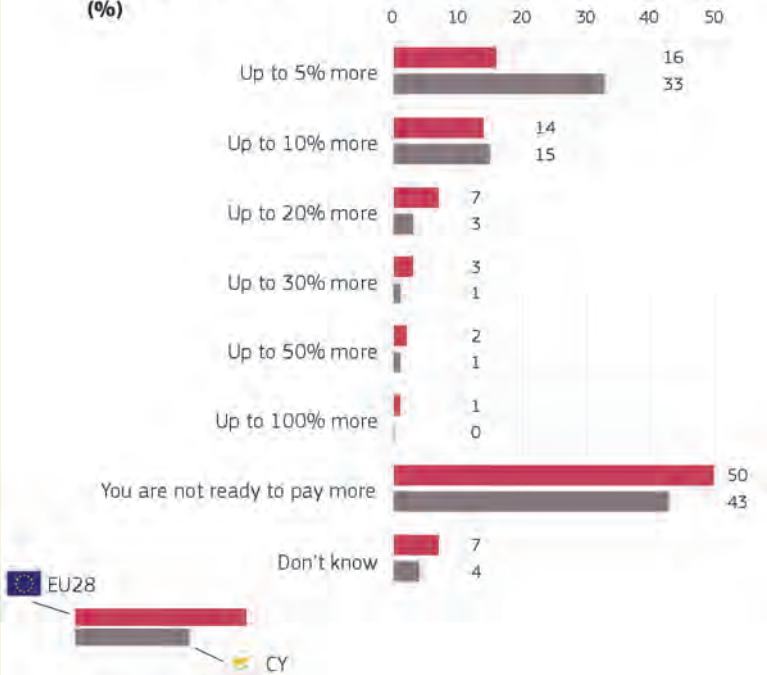
### 3. SUSTAINABILITY - WILLINGNESS TO PAY MORE AND OBSTACLES

**QA7** How much more would you be willing to pay for your daily personal transport cost, if this was significantly better for the environment? (%)



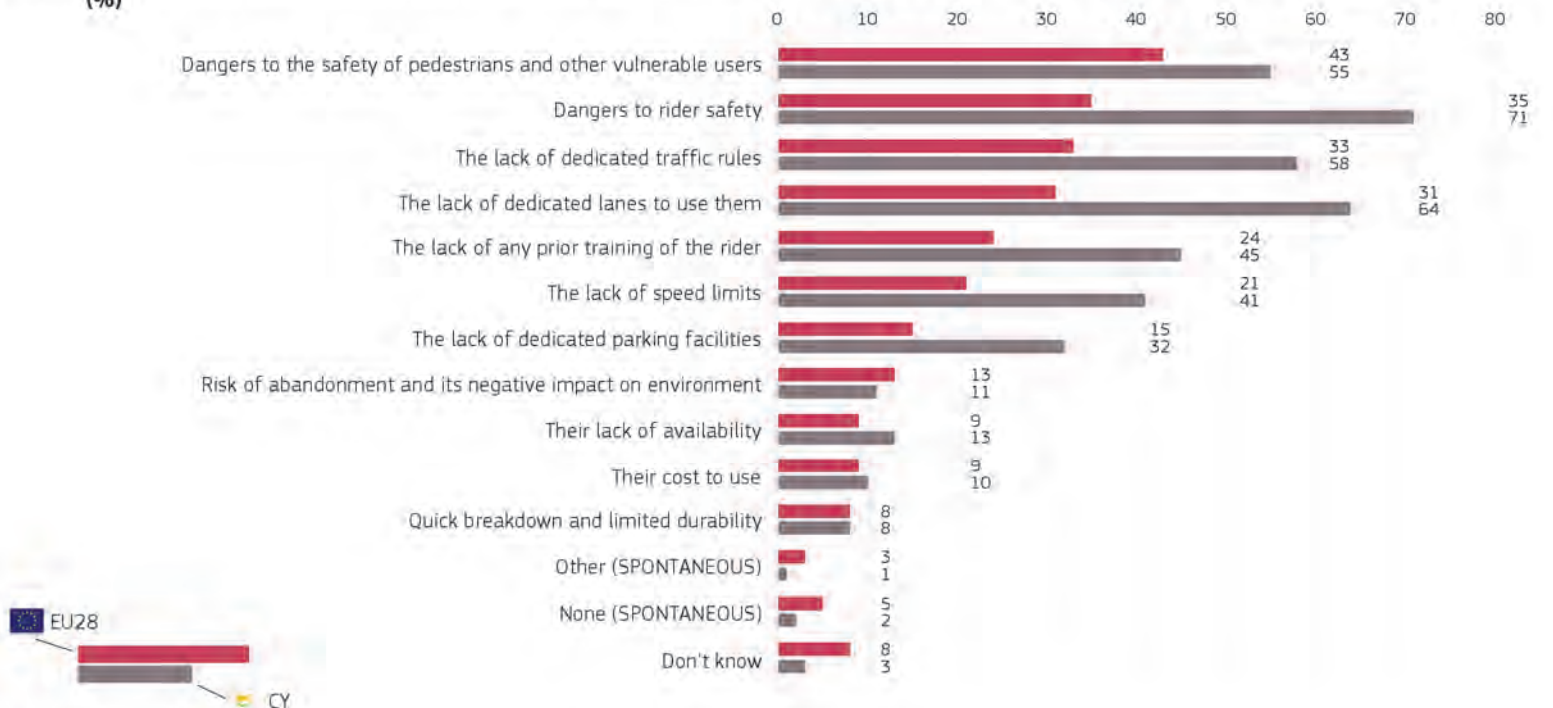
Base: all respondents (n=27.565)

**QA16** How much more would you be willing to pay for air travel to offset its environmental impact? (e.g. to offset CO2 emissions or to use cleaner but more expensive fuel)? (%)



Base: all respondents (n=27.565)

**QA10** Let's now discuss about e-scooters. What do you see as key challenges to address as regards e-scooters in urban areas? (MULTIPLE ANSWERS POSSIBLE) (%)



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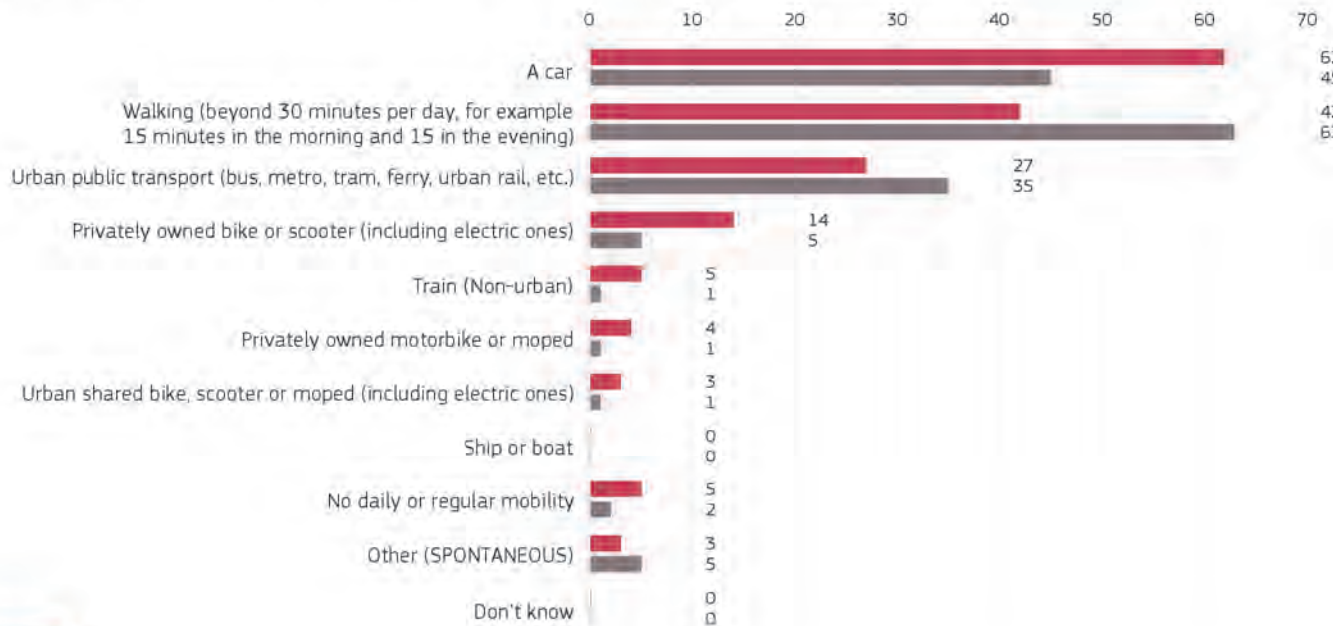
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Bulgaria

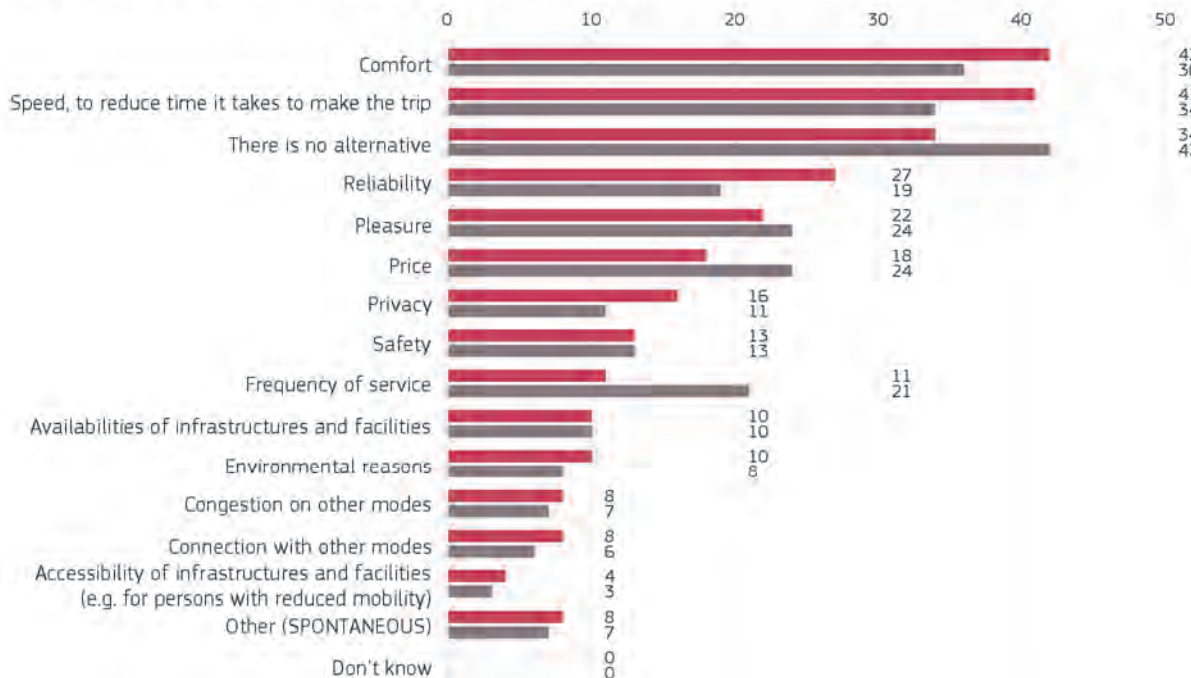
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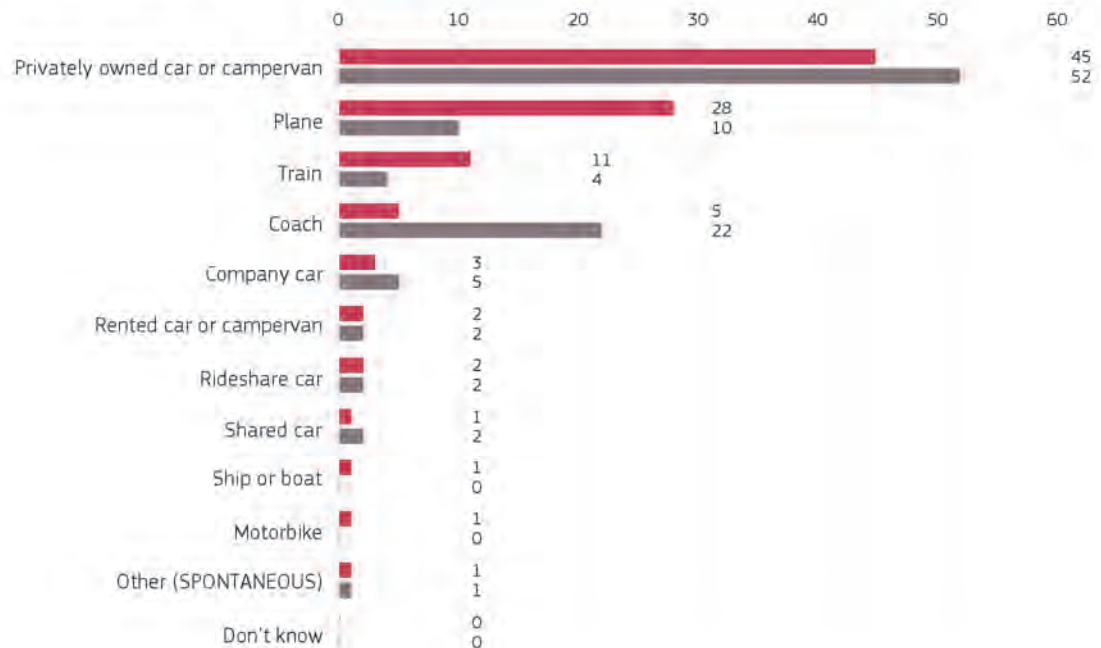
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Bulgaria

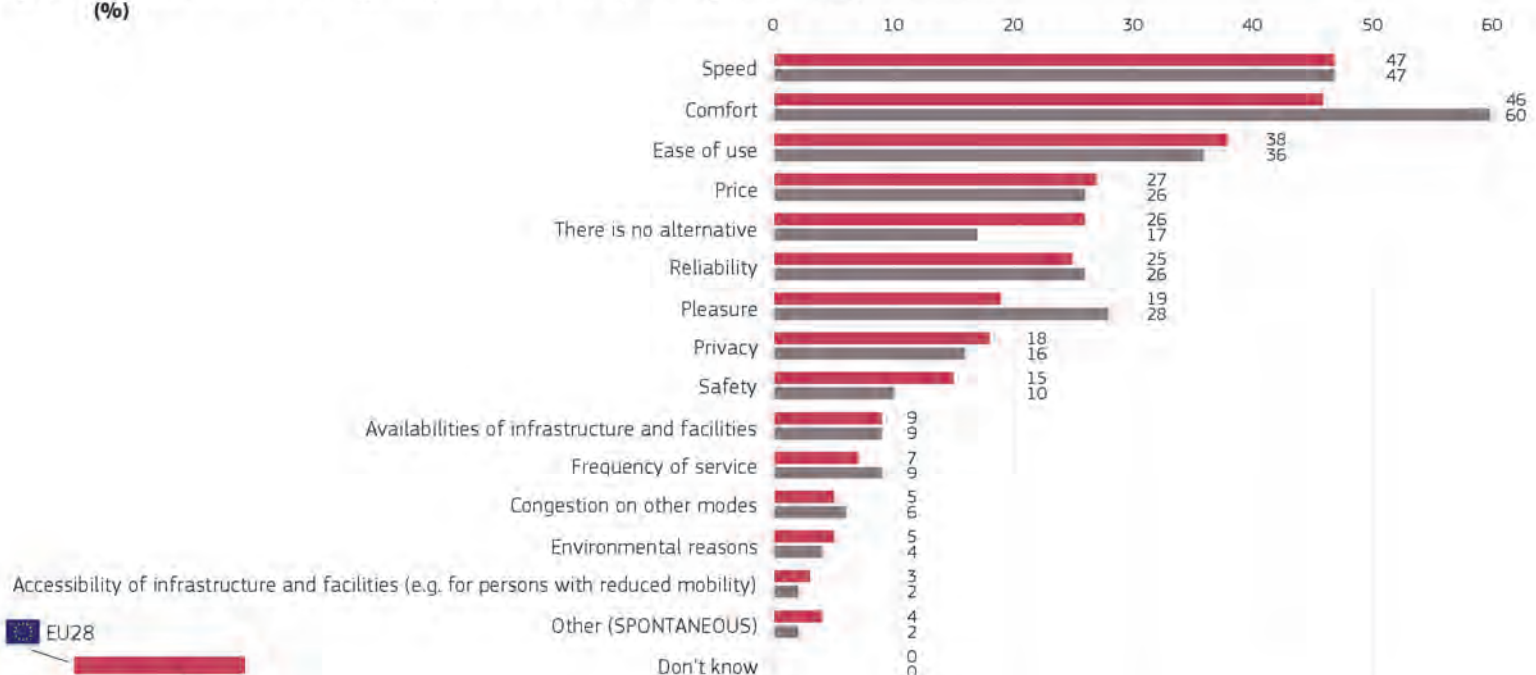
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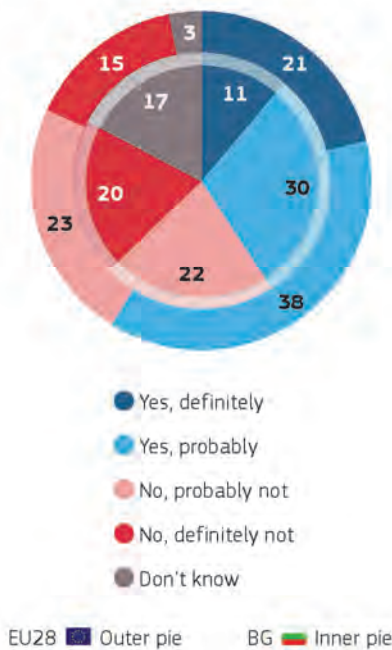
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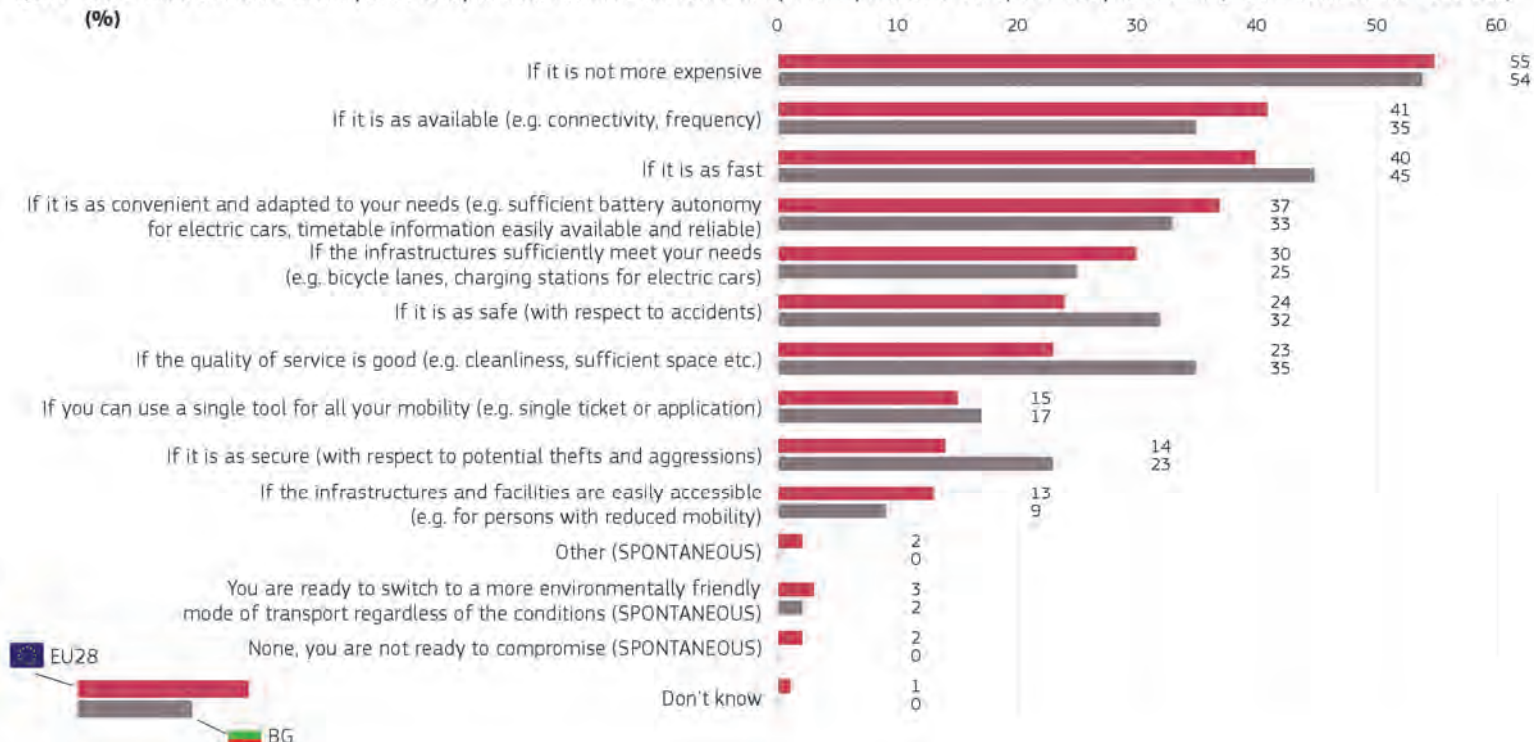
	EU28	BG
TOTAL	59	41
<b>Age</b>		
15-24	70	51
25-39	61	43
40-54	62	46
55+	53	30
<b>Education (End of)</b>		
15-	41	25
16-19	55	41
20+	68	42
Still studying	74	51
<b>Subjective urbanisation</b>		
Rural village	55	39
Small/ Mid-size town	61	52
Large town	63	35

Socio-demographic breakdown

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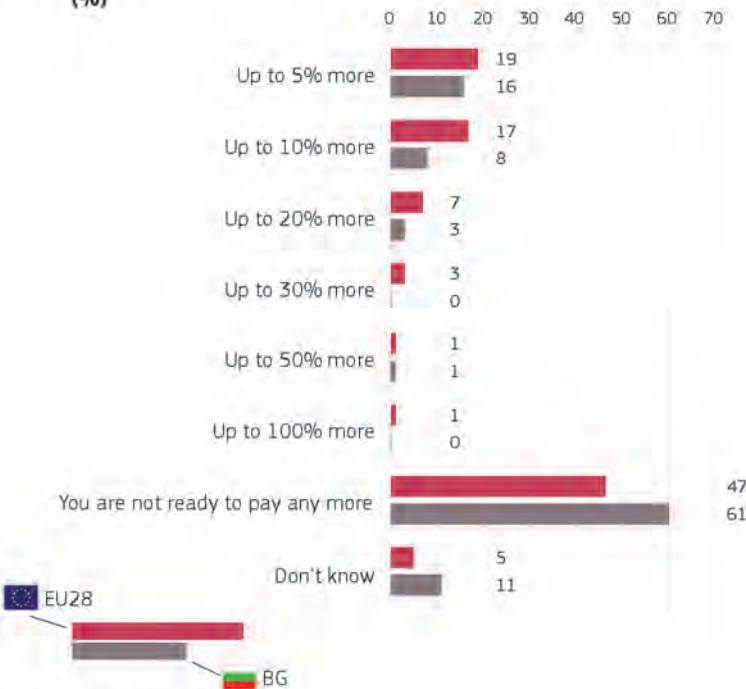
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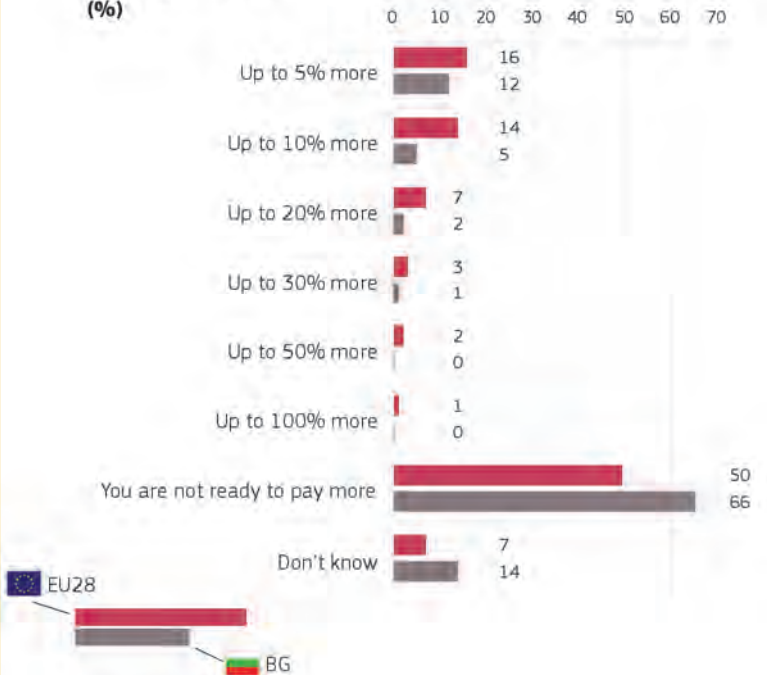
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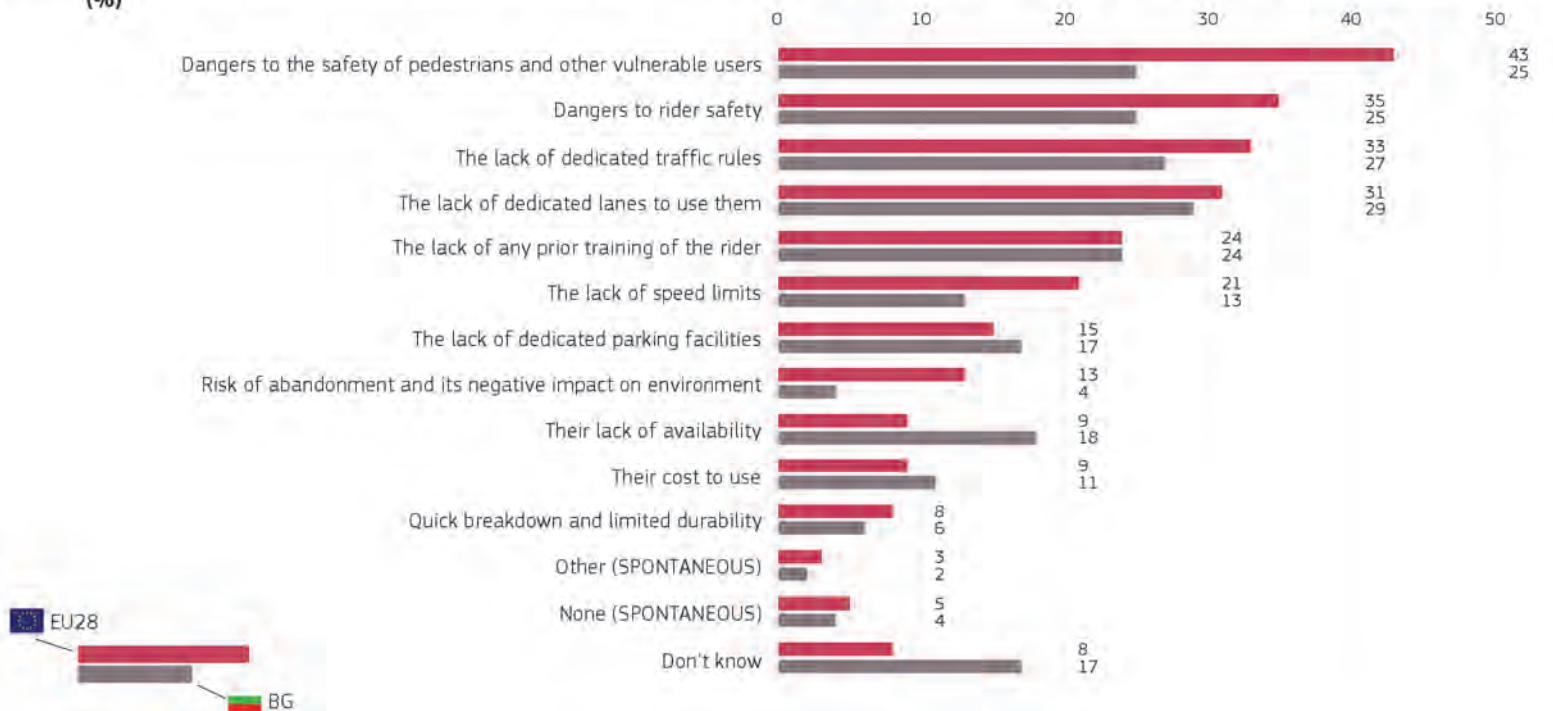
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27.565 interviews  
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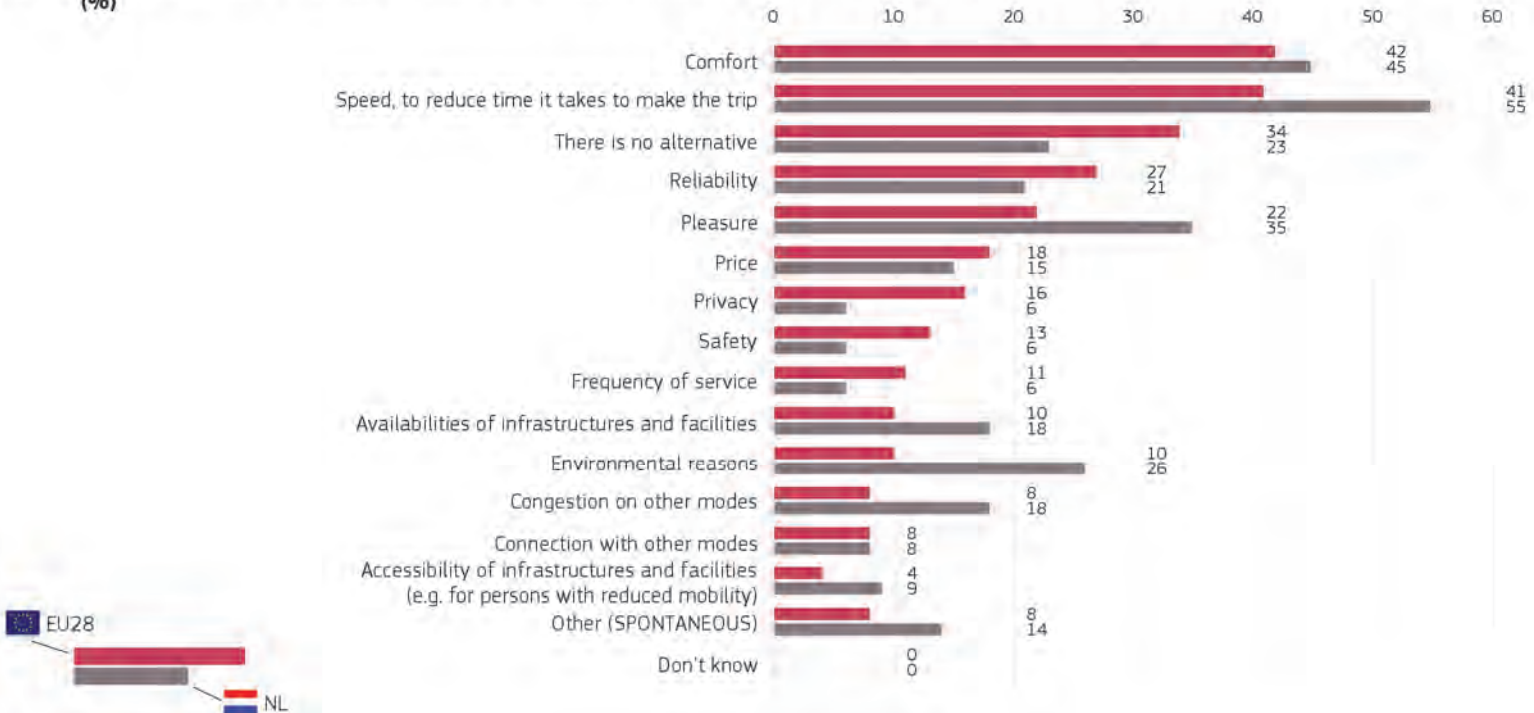
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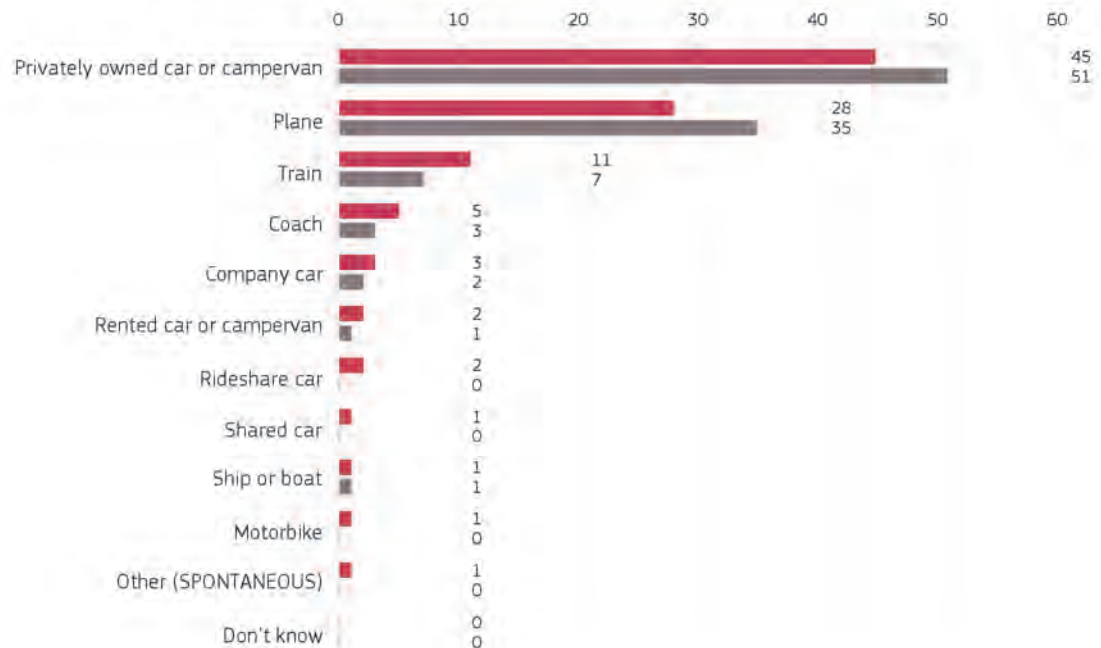
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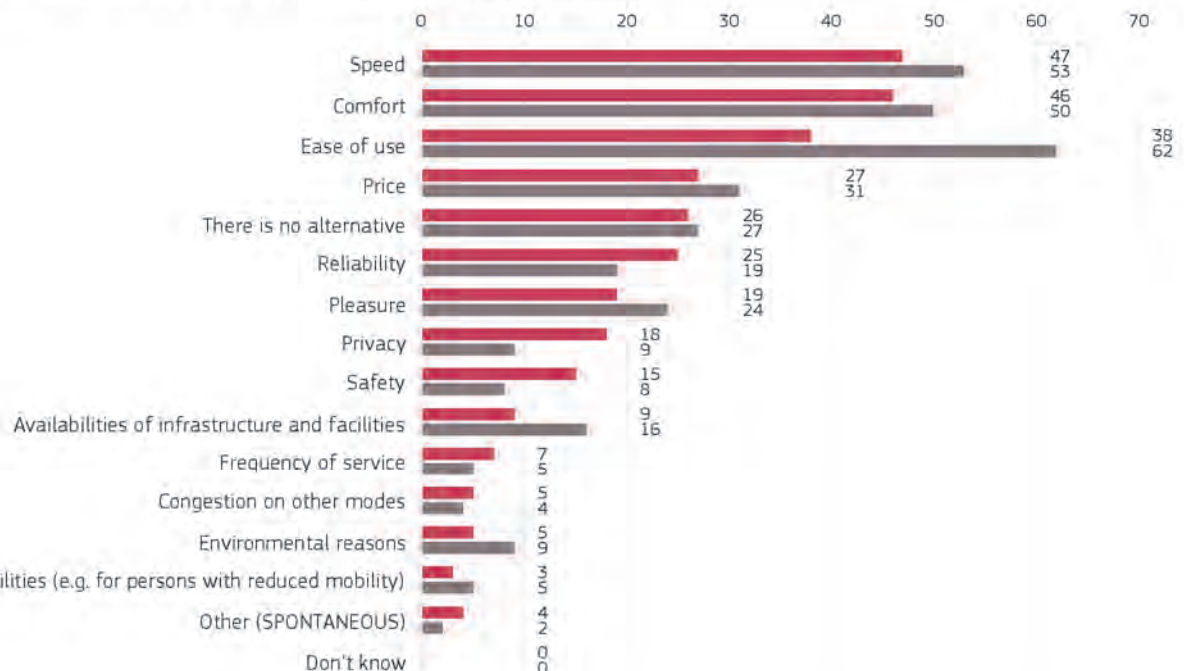
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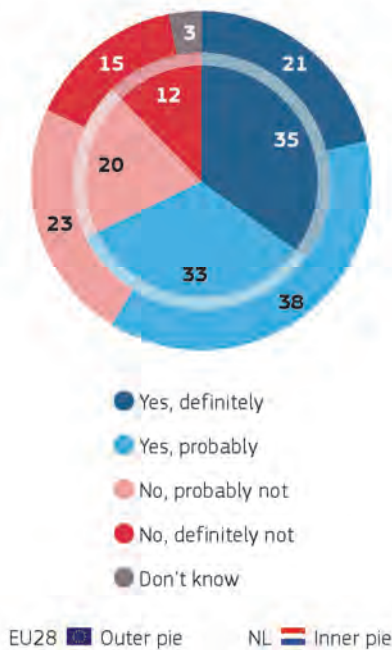
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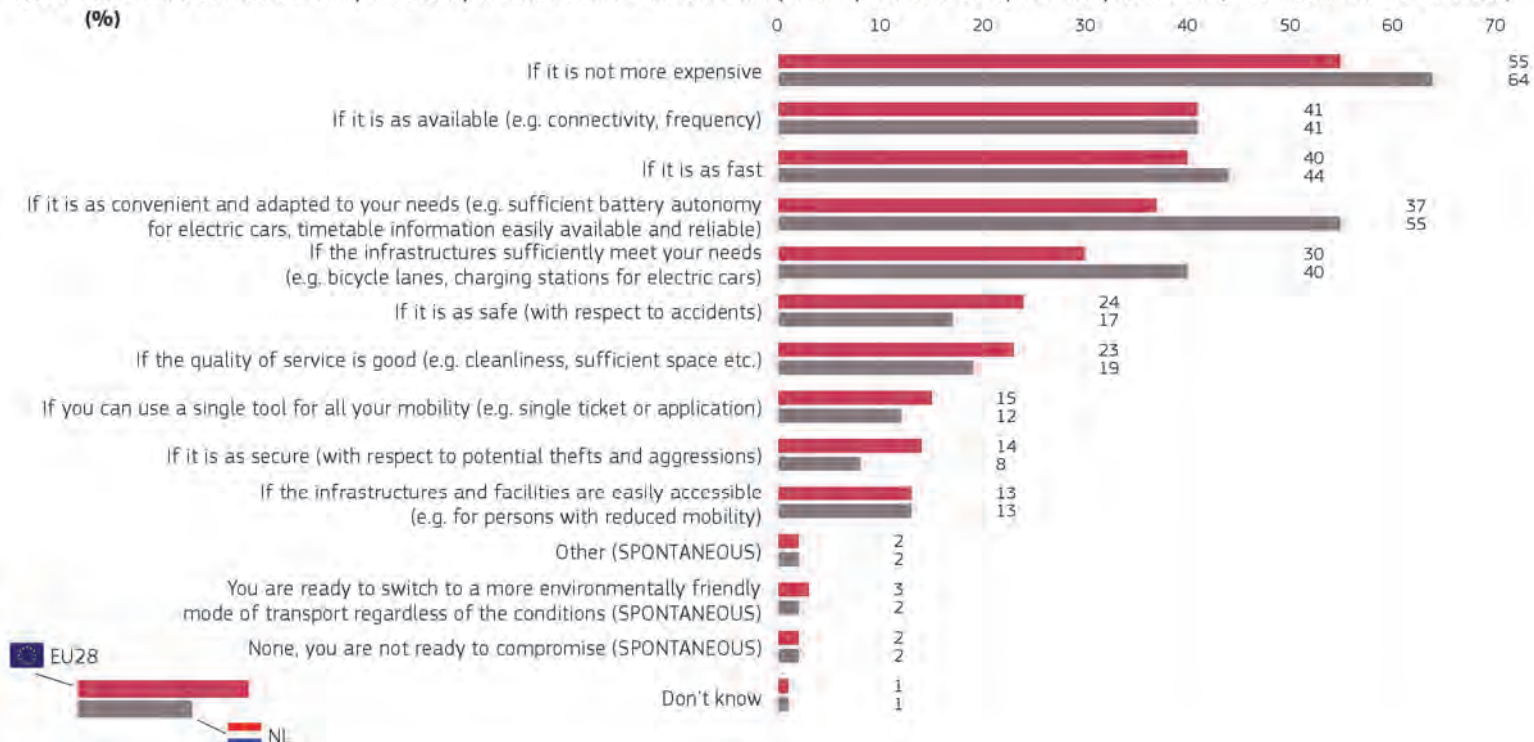
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Small/ Mid-size town	61	66
Large town	63	74

Base: all respondents who use cars other than zero-emission cars (n=16.717)

Base: all respondents who use cars other than zero-emission cars (n=16.717)

**QA6T** Under what conditions would you be ready to switch to more environmentally friendly modes of transport? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE) (%)



Base: respondents who would be ready to switch to more sustainable modes of transport (n=9.877)

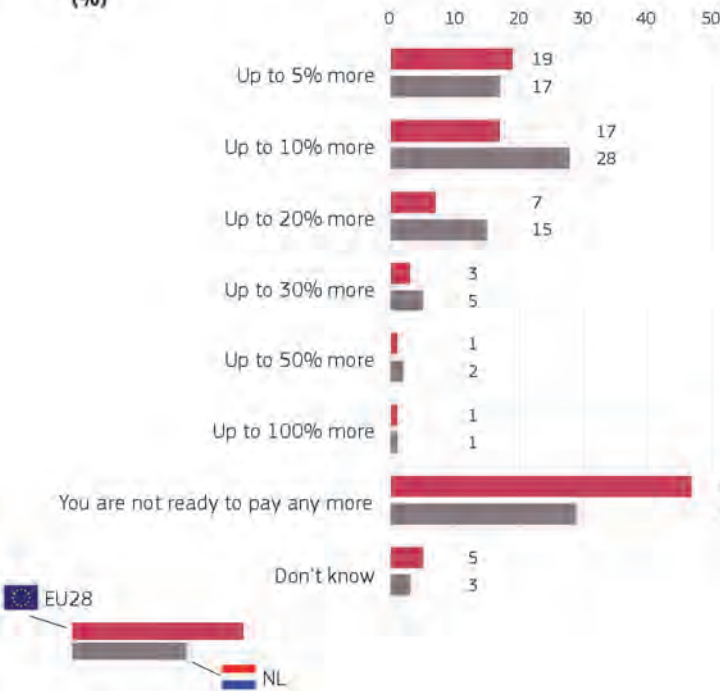
27.565 interviews  
11 > 29 / 09 / 2019

1.049 interviews  
11 > 22 / 09 / 2019

Methodology: face-to-face

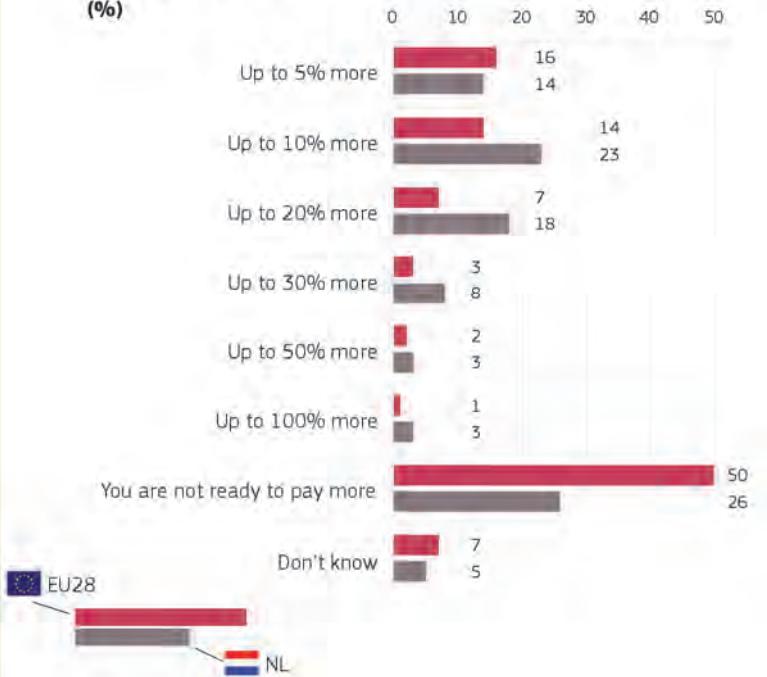
3. SUSTAINABILITY - WILLINGNESS TO PAY MORE AND OBSTACLES

**QA7** How much more would you be willing to pay for your daily personal transport cost, if this was significantly better for the environment? (%)



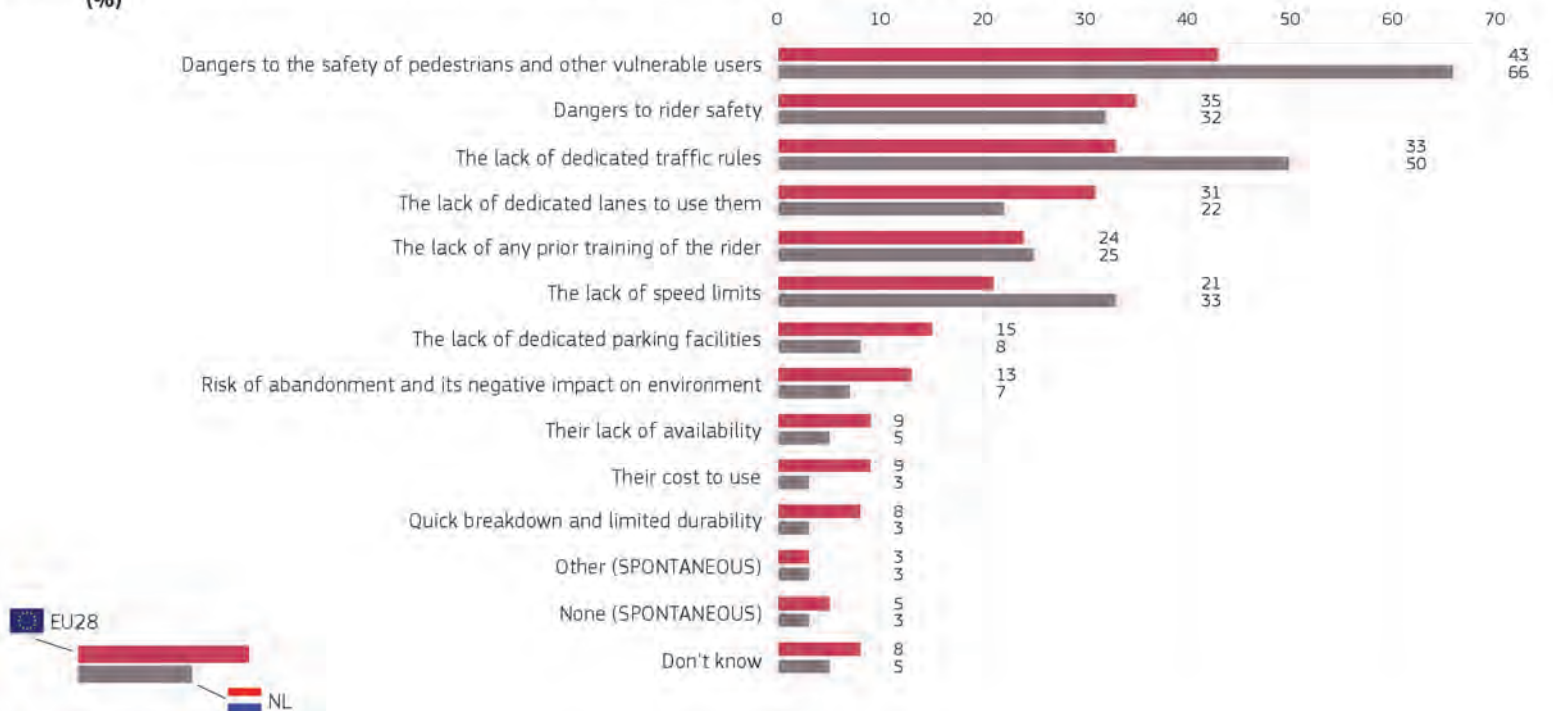
Base: all respondents (n=27.565)

**QA16** How much more would you be willing to pay for air travel to offset its environmental impact? (e.g. to offset CO2 emissions or to use cleaner but more expensive fuel)? (%)



Base: all respondents (n=27.565)

**QA10** Let's now discuss about e-scooters. What do you see as key challenges to address as regards e-scooters in urban areas? (MULTIPLE ANSWERS POSSIBLE) (%)



Base: all respondents (n=27.565)





# Special Eurobarometer 495

## Summary

## Mobility and Transport

Fieldwork  
September 2019  
Publication  
July 2020

Survey requested by the European Commission,  
Directorate-General for Mobility and Transport  
and co-ordinated by the Directorate-General for Communication

This document does not represent the point of view of the European Commission.  
The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 495 – Wave EB92.1– Kantar





# Special Eurobarometer 495

## Summary

### Mobility and Transport

September 2019

Survey conducted by Kantar on behalf of Kantar Belgium at the request of the European Commission,  
Directorate-General for Mobility and Transport

Survey co-ordinated by the European Commission, Directorate-General for Communication  
(DG COMM "Media Monitoring and Eurobarometer" Unit)

Project title

Special Eurobarometer 495  
“Mobility and Transport”  
Summary  
EN

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<https://ec.europa.eu/commfrontoffice/publicopinion>

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## INTRODUCTION

This report presents the results of the Special Eurobarometer public opinion survey on the environment, conducted between 11 and 29 September 2019 in the 28 European Union Member States. At the time of fieldwork, the UK was still a member of the European Union, and therefore the UK results are included in the report.

In setting out the aims of her presidency of the European Commission, President Ursula von der Leyen has identified six clear ambitions for Europe in the next five years and beyond: A European Green Deal; an economy that works for people; a Europe fit for the digital age; protecting our European way of life; a stronger Europe in the world; and a new push for European democracy<sup>1</sup>.

Transitioning Europe's transport sector to more sustainable and smart alternatives will be a key part of delivering President Ursula von der Leyen's priorities. Mobility is a key factor in shaping the lives of Europeans, and is also key component of household budgets, with transport accounts for 13% of household expenditure. The mobility sector is also a key employer in the EU, accounting for 5% of total employment and more than 11 million people<sup>2</sup>. It also accounts for about 7% of Europe's GDP. Moving people and freight is a continually growing industry, and an effective transport industry is crucial for economic growth, as well as having impacts on social development and the environment<sup>3</sup>.

The current survey was commissioned by the Directorate-General for Mobility and Transport to explore a range of factors relating to mobility, including daily and longer-distance travel amongst Europeans. It covers the following areas:

- Frequently used modes of daily transport and the reasons for choosing them;
- The biggest challenges for daily mobility;
- Perceptions of traditional taxi services vs private hire vehicles;
- Challenges for e-scooters in urban environments;
- Willingness to switch to more sustainable forms of daily mobility, the conditions that would need to be met before switching, and willingness to pay more;
- The frequency of longer distance journeys, the modes of transport used and the reasons for choosing them;
- The biggest challenges for long distance journeys;
- Factors that would influence the choice of a more sustainable method of long-distance travel and willingness to pay more for more sustainable long-distance travel;
- Prevalence of having goods home-delivered, the preferred options for making deliveries more environmentally friendly, and the factors that would influence this choice.

**Note:** In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

<sup>1</sup> [https://ec.europa.eu/commission/sites/beta-political/files/political-guidelines-next-commission\\_en.pdf](https://ec.europa.eu/commission/sites/beta-political/files/political-guidelines-next-commission_en.pdf)

<sup>2</sup> <https://ec.europa.eu/transport/sites/transport/files/mobility-package-factsheet-overall.pdf>

<sup>3</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1438352918707&uri=CELEX:52006DC0314>



Austria	AT	Ireland	IE
Belgium	BE	Italy	IT
Bulgaria	BG	Lithuania	LT
Republic of Cyprus	CY *	Luxembourg	LU
Czechia	CZ	Latvia	LV
Germany	DE	Malta	MT
Denmark	DK	The Netherlands	NL
Estonia	EE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
Finland	FI	Sweden	SE
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Hungary	HU	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28
European Union without the UK - weighted average for the 27 Member States			EU27

\* Cyprus as a whole is one of the 28 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU28 average.

*We wish to thank the people throughout the European Union  
who have given their time to take part in this survey.*

*Without their active participation, this study would not have been possible.*

## I. DAILY MOBILITY

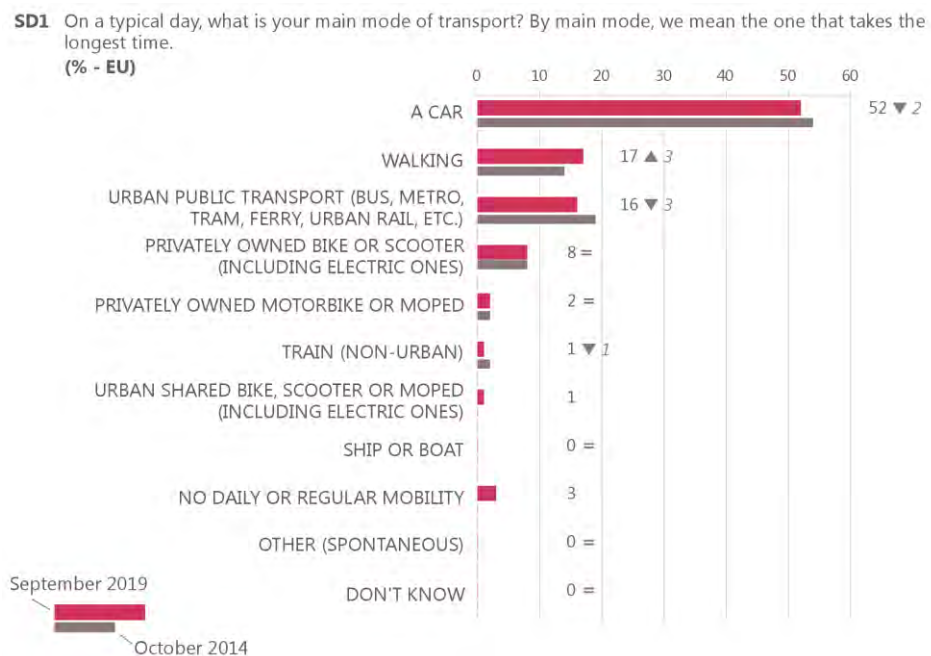
### 1. The most frequently used modes of transport

#### Cars are the dominant mode of daily transport

When asked about their main mode of transport on a typical day, the majority of respondents (52%) say it is a car<sup>4</sup>. This is significantly higher than the proportions who mention walking (17%) or urban public transport (16%). Almost one in ten (8%) use a privately-owned scooter, while 2% mention a privately-owned motorbike or moped, 1% mention a non-urban train and 1% an urban shared bike, scooter or moped.

There has been little change in these results since 2014<sup>5</sup>.

Results are the same when analysing the EU27, except for those who mention car (51%) and privately-owned motorbike or moped (3%).



Base: all respondents (n= 27,565)

In all 28 Member States, a **car** is the main mode of transport on a typical day, although proportions vary considerably: from 89% of respondents in Cyprus, 71% in Slovenia and 68% in Ireland to 35% in Romania and 36% in Hungary and Bulgaria.

The proportion who say **walking** is their main mode of transport ranges from 34% in Bulgaria and 30% in Spain and Romania to 5% in the Netherlands and Cyprus and 7% in Luxembourg and Denmark.

In 12 countries, at least one in five say **urban public transport** is their main mode, with respondents in Czechia (28%), Lithuania (26%), and Bulgaria, Romania, Latvia and Estonia (all 23%) the most likely to say this. At the other end of the scale 3% in Cyprus, 4% in the Netherlands and 6% in Denmark say urban public transport is their main mode.

<sup>4</sup> SD1 On a typical day, what is your main mode of transport? By main mode, we mean the one that takes the longest time.

<sup>5</sup> In 2014, item "Privately owned bike or scooter (including electric ones)" was "Bicycle"

Respondents in the Netherlands (41%) are much more likely than those in other countries to say a **privately-owned bike or scooter** is their main mode of transport, with Sweden (21%) the only other country where at least one in five say this.

Italy (8%) and Greece (7%) are the only countries where at least one in twenty say a **privately-owned motorbike or moped** is their main form of transport, while respondents in the Netherlands (5%) are the most likely to say a **non-urban train** is their main mode.

The highest proportions of respondents who say they have **no daily or regular mobility** are seen in Lithuania (7%) and Poland (6%).

### Around four in ten only use one mode of transport on a typical day

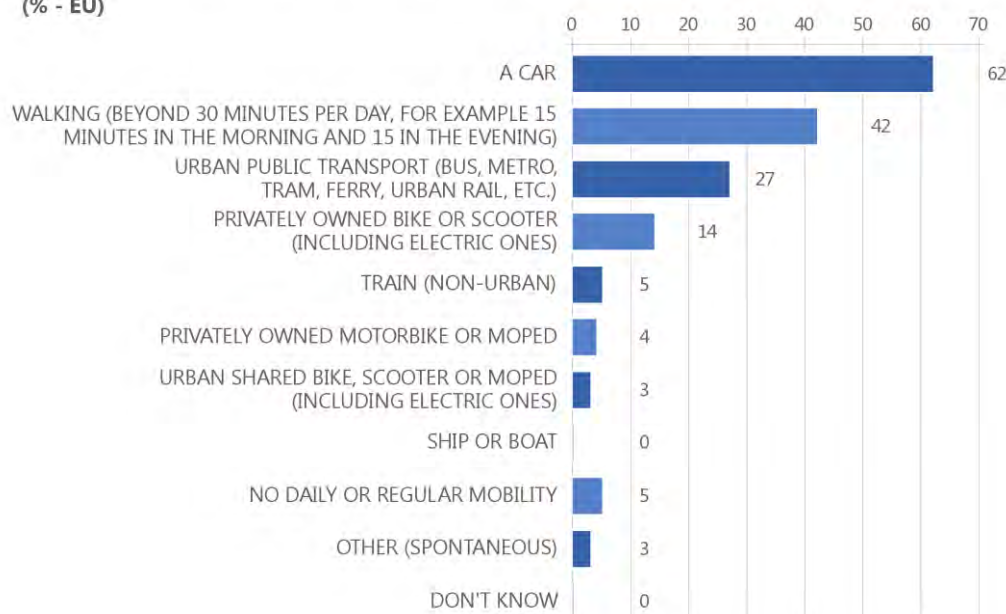
Respondents were also asked about any other modes of transport they use in combination with their main mode of daily transport<sup>6</sup>. In addition to their main mode, one quarter walk, 11% use urban public transport and 9% use a car. A privately-owned bike or scooter (6%) is the only other mode mentioned by at least one in twenty.

The most common answer, however, is that respondents don't use another form of transport in conjunction with the main mode. The following results show the overall use of different modes of transport on a typical day – either as the main mode or in combination with the main form of daily travel.

Not surprisingly, cars dominate. More than six in ten (62%) use a car on a typical day, and this is the only mode mentioned by at least half of the respondents. Just over four in ten (42%) use walking as their main mode of transport or in combination with the main mode, while 27% use urban public transport and 14% a privately-owned bike or scooter.

A non-urban train (5%) is the only other mode of transport mentioned by at least one in twenty.

**SD1T** On a typical day, what is your main mode of transport? Is your main mode of transport used in combination with...? (% - EU)



Base: all respondents who have a daily or regular mobility (n= 26,864)

<sup>6</sup> QA1 On a typical day, is your main mode of transport used in combination with...?

Cars are the dominant form of daily mobility in almost all countries, although in Spain and Czechia they are equally mentioned with walking. Walking is the main mode of daily mobility in Romania, Slovakia and Bulgaria, while in the Netherlands the main mode is a privately-owned bike or scooter.

### **Private vehicles are by far the most common type of car used for daily mobility**

Amongst respondents whose use a car on a typical day, 89% say it is their private vehicle<sup>7</sup>. Just 4% say it is a company vehicle, 2% that it is a private hire vehicle, and 1% that it is a taxi, shared vehicle or ride-sharing vehicle.

When analysing the EU27 results, some items have a difference of 1pp compared to the EU28: those who mention private vehicle (90%), a company vehicle (5%), private hire vehicle (1%) and a shared vehicle (0%).

A **private vehicle** is by far the most common kind of car mentioned in each country, with proportions ranging from 94% of car users in Spain, 93% in France to 75% in Romania and 83% in Belgium.

**Company vehicles** are most often mentioned by respondents in Belgium (10%), Czechia (9%), Luxembourg, Denmark and Germany (8% each).

Romania is the only country where at least one in twenty mentions a **taxi** (6%) or a **private hire vehicle** (5%). Bulgaria has the highest proportion of respondents who say the car is a **ride-sharing vehicle** (4%), while no more than 2% in any Member State say the car is a **shared vehicle**.

### **Almost all cars used for daily mobility run on conventional fuel**

Amongst respondents whose use a car on a typical day, more than nine in ten (91%) say the car runs on conventional fuel. One in twenty (5%) say it is another type of alternative fuelled car (e.g. CNG, LPG), while 2% say the car is a hybrid. Just 1% say the car they use is a zero-emission car or a plug-in hybrid car. Results are the same when analysing the EU27.

Although the majority of car users in each country say the car is a **conventional fuelled car**, the proportions do vary: from 98% in Denmark, Spain, Hungary and Slovenia to 63% in Bulgaria, 73% in Poland and 78% in Italy. Bulgaria (31%), Poland (24%) and Italy (14%) are the only countries where at least one in ten say the car runs on **another type of alternate fuel** such as CNG or LPG. Italy and Ireland (both 5%) are the only countries where at least one in twenty says the car is a **hybrid**. Ireland (3%) is the only country where more than 2% say the car is a **zero-emission** model, while Romania (2%) is the only country where more than 1% say the car is a **plug-in hybrid**.

---

<sup>7</sup> QA2 Is the car you use most...?

## 2. Reasons for using different modes of transport

### Comfort and speed are the main factors for choosing the main mode of daily transport

Respondents were asked about the reasons for using their main form of daily transport<sup>8</sup>. The chart below illustrates all the answers (first response and any others) given by respondents.

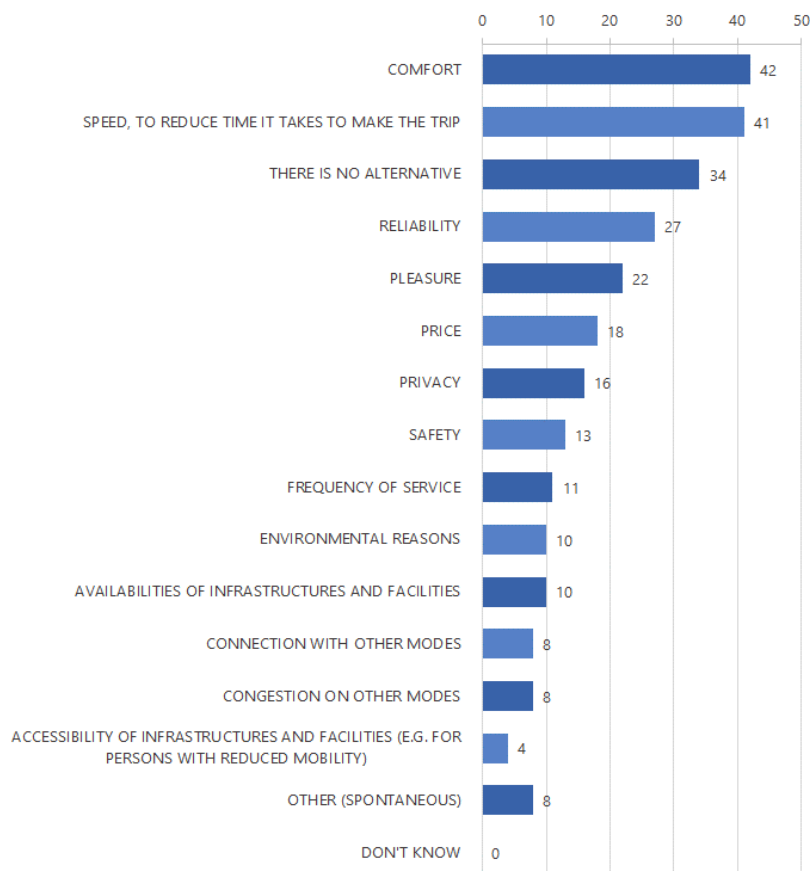
Just over four in ten cite comfort (42%) and speed (41%). The third most common answer is that there is no alternative (34%).

More than one quarter (27%) say reliability is a reason, while 22% mention pleasure and 18% cite price. At least one in ten give privacy (16%), safety (13%), service frequency (11%), environmental reasons (10%) or the availability of infrastructure and facilities (10%) as their reason.

Fewer than one in ten mention connections with other transport modes, congestion on other modes (8% each) or accessibility (4%).

When analysing results for the EU27, there is a difference of 1pp among those who say speed (42%), congestion on other modes (9%), other (9%) and those who mention that there is no alternative (35%). There is a 2pp difference among those who mention reliability (25%).

QA0T What are the reasons for using this main mode of transport? Firstly? And then?  
(MAX. 4 ANSWERS) (% - EU)



Base: all respondents who have a daily or regular mobility (n= 26,747)

<sup>8</sup> QA0T - What are the reasons for using this main mode of transport? Firstly? And then?

### 3. Main challenges of daily mobility

#### Cost and congestion are the biggest challenges for daily mobility

All respondents were asked what they thought were the biggest challenges for transport when it comes to daily mobility<sup>9</sup>. The chart below illustrates all the answers (first response and any others) given by respondents. Cost and congestion (both 39%) are the most mentioned, followed by availability and connectivity (32%). More than one quarter mention damage to the environment (29%) or the quality of service in public transport (27%), while 24% mention safety and 23% say the quality of infrastructures are the main challenges for transport.

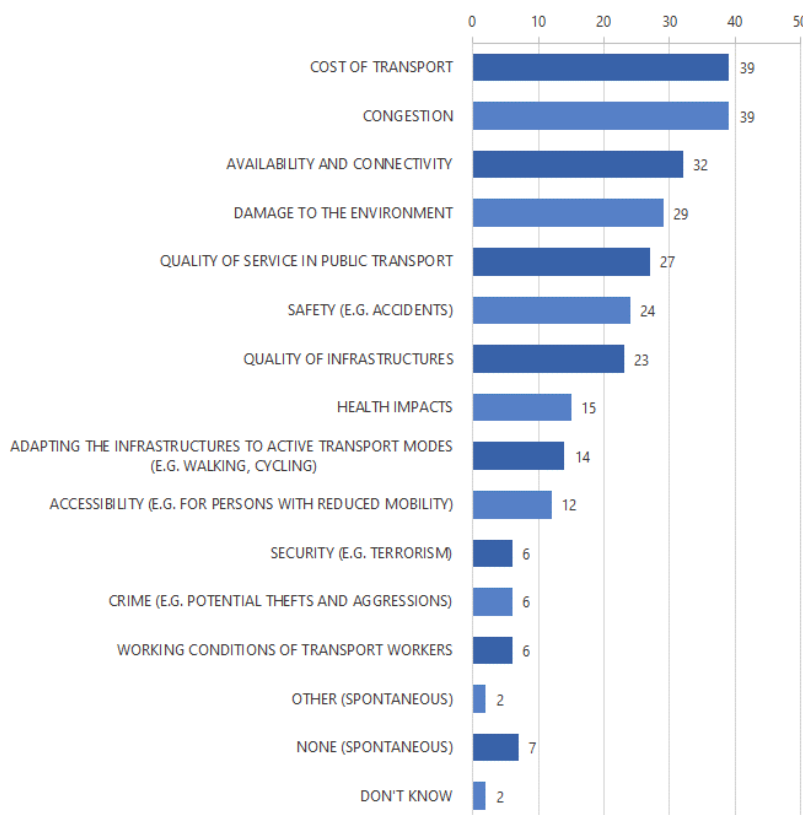
More than one in ten say health impacts (15%), adapting infrastructures to active transport modes (14%) or accessibility (12%) are main challenges for transport when it comes to daily mobility.

Security, crime and the working conditions of transport workers are each seen as one of the biggest challenges by 6% of respondents.

When analysing results for the EU27, there is a difference of 1pp among those who say cost of transport (38%), congestion (38%), availability and connectivity (33%), damage to the environment (30%), safety (25%), health impacts (16%), adapting the infrastructures to active transport modes (15%), accessibility (11%), other (3%) and none (6%)

There is a 2pp difference among those who mention quality of infrastructures (25%).

**QA4T** Thinking about daily mobility, what do you see as the biggest challenges for transport? Firstly? And then? (MAX. 4 ANSWERS) (% - EU)



Base: all respondents (n= 27,565)

<sup>9</sup> QA4T - Thinking about daily mobility, what do you see as the biggest challenges for transport? Firstly? And then?

## 4. Perceptions of traditional and new mobility services

### a. Taxis and Private Hired Vehicles

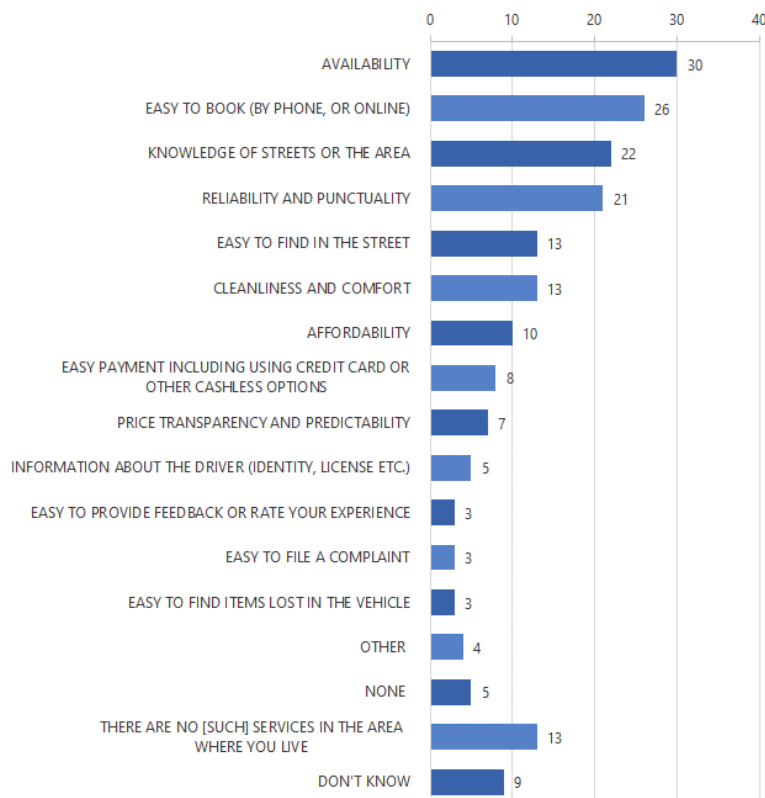
#### Availability is the most positive aspect of traditional taxi services

Respondents were asked about the positive aspect of the traditional taxi services in the area where they live<sup>10</sup>. Three in ten mention availability, while 26% say they are easy to book. Just over one in five say knowledge of the streets or area (22%) and reliability and punctuality (21%) are positive aspects of these services.

At least one in ten say traditional taxi services in their area are easy to find on the street (13%), or that cleanliness and comfort (13%) and affordability (10%) are positive aspects. More than one in twenty mention easy payment (8%) and price transparency and predictability (7%). Other factors are mentioned by no more than 5% of respondents. It is worth noting that 5% of respondents say none of the factors listed were positive aspects of the traditional taxi services in their area, while 13% say there are no traditional taxi services in the area where they live.

Results are the same when analysing the EU27, except for availability (29%), easy to book (25%) and price transparency and predictability (6%)

**QA8** Let's now think about traditional taxi services in your city or in the area where you live: what are their positive aspects? (MULTIPLE ANSWERS POSSIBLE) (% - EU)



Base: all respondents (n= 27,565)

<sup>10</sup> QA8 Let's now think about traditional taxi services in your city or in the area where you live: what are their positive aspects?



In 11 countries, respondents most often mention availability as a positive aspect of traditional taxi services in their area. In 9 countries the most mentioned aspect is easy to book, while knowledge of the streets or area is the most mentioned aspect in two countries. In Greece availability and knowledge of the streets or area are equally mentioned, while in Bulgaria ease of booking and ease of finding in the street are equally mentioned. In the remaining four countries (Hungary, Slovenia, Romania and France) the fact that there are no traditional taxi services in the area is the most mentioned answer.

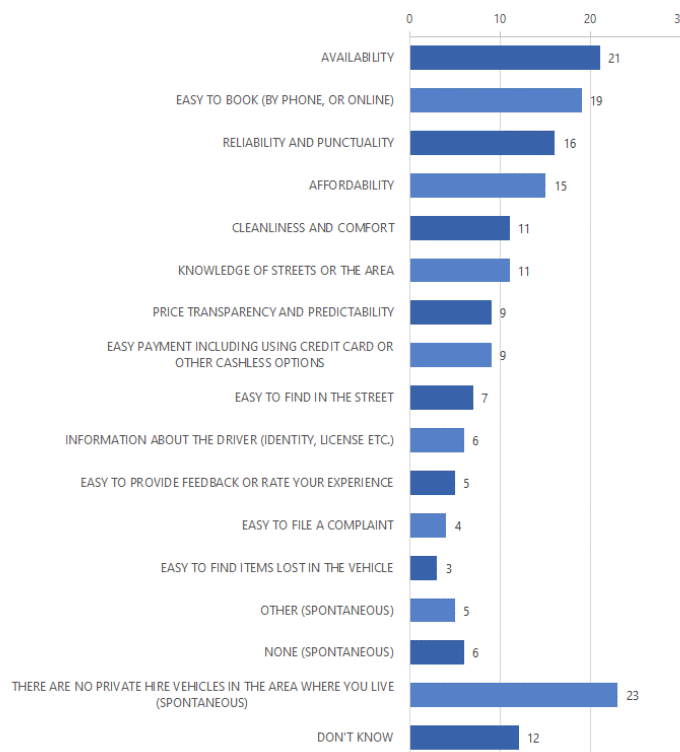
**Availability is also the most mentioned positive aspect about private hire vehicles**

Respondents were then asked about the positive aspects of private hire vehicles<sup>11</sup>. Availability is most mentioned (21%), closely followed by ease of booking (19%). Reliability and punctuality are mentioned by 16%, while 15% mention affordability. Cleanliness and comfort are each mentioned by 11% of respondents.

Almost one in ten say price transparency and predictability (9%), and easy payment (9%) are positive aspects of private hire vehicles, while 7% say this about ease of finding them on the street. Information about the driver is considered positive by 6%, while 5% say ease of providing feedback is a positive aspect. Other factors are mentioned by 4% or less. Almost one quarter (23%) say there are no private hire vehicles in the area where they live.

When analysing results for the EU27, there is a difference of 1pp among those who say availability (20%), easy to book (18%), reliability and punctuality (15%), price transparency and predictability (8%), easy payment (8%), easy to file a complaint (3%), none (5%) and don't know (11%). There is a 2pp difference among those who mention that there are no private hire vehicles in the area where you live (25%)

QA9 Thinking now about private hire vehicles, what would you identify as their positive aspects? (MULTIPLE ANSWERS POSSIBLE) (% - EU)



Base: all respondents (n= 27,565)

<sup>11</sup> QA9 Thinking now about private hire vehicles, what would you identify as their positive aspects?

Ease of booking is the most mentioned positive aspect in four countries. It is the most mentioned along with availability in Luxembourg, and in Czechia it is equally mentioned along with the fact there are no private hire vehicles. Availability is the most mentioned in one country, while in Italy and Croatia it is equally mentioned along with reliability and punctuality. However, in 19 countries the most common answer is that there are no private hire vehicles in the area where they live.

### Taxis vs private hire vehicles

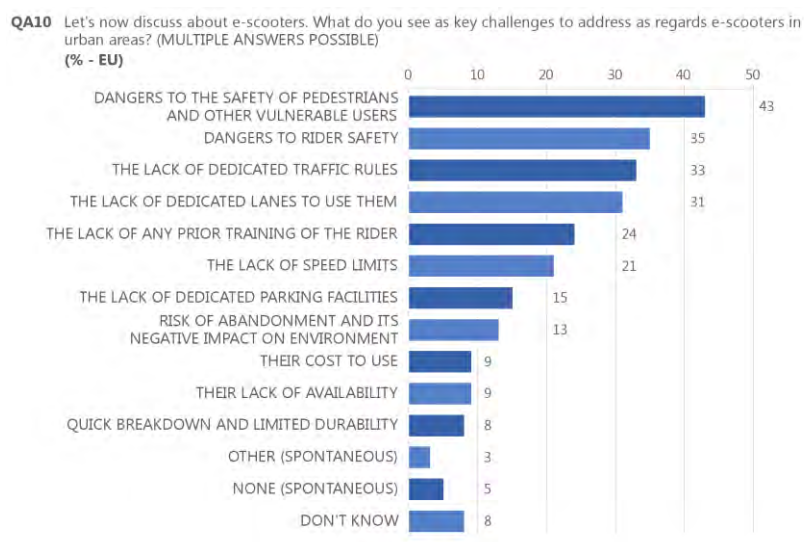
Comparing the results for private hire vehicles with those for taxis in the previous question shows respondents are more likely to associate affordability with private hire vehicles (15% vs 10% for taxi services), but they are less likely to associate private hire vehicles with knowledge of streets or area (11% vs 22%), availability (21% vs 30%), ease of booking (19% vs 26%) or ease of finding in the street (13% vs 7%). Respondents are also more likely to say private hire vehicles are not available in their area than they are to say this about taxis (23% vs 13%).

#### b. E-scooters

More than four in ten (43%) respondents consider dangers to the safety of pedestrians and other vulnerable users as a key challenge for e-scooters in urban areas<sup>12</sup>. At least three in ten mention dangers to rider safety (35%), the lack of dedicated traffic rules (33%) or the lack of dedicated lanes to use e-scooters (31%).

More than one in five consider the lack of prior rider training (24%) or the lack of speed limits (21%) as key challenges, while more than one in ten mention the lack of dedicated parking facilities (15%) or the risk of abandonment and its negative environmental impact (13%). Cost (9%), lack of availability (9%) and quick breakdown and limited durability (8%) are each mentioned by almost one in ten. Almost one in ten (8%) say they don't know, while 5% think none of these issues are challenges.

When analysing results for the EU27, there is a difference of 1pp among those who say dangers to rider safety (36%), the lack of prior training of the rider (25%), the lack of speed limits (22%), the lack of dedicated parking facilities (16%), risk of abandonment and its negative impact on environment (14%), quick breakdown and limited durability (9%). There is a 2pp difference among those who mention dangers to the safety of pedestrians and other vulnerable users (45%), the lack of dedicated lanes to use them (33%).

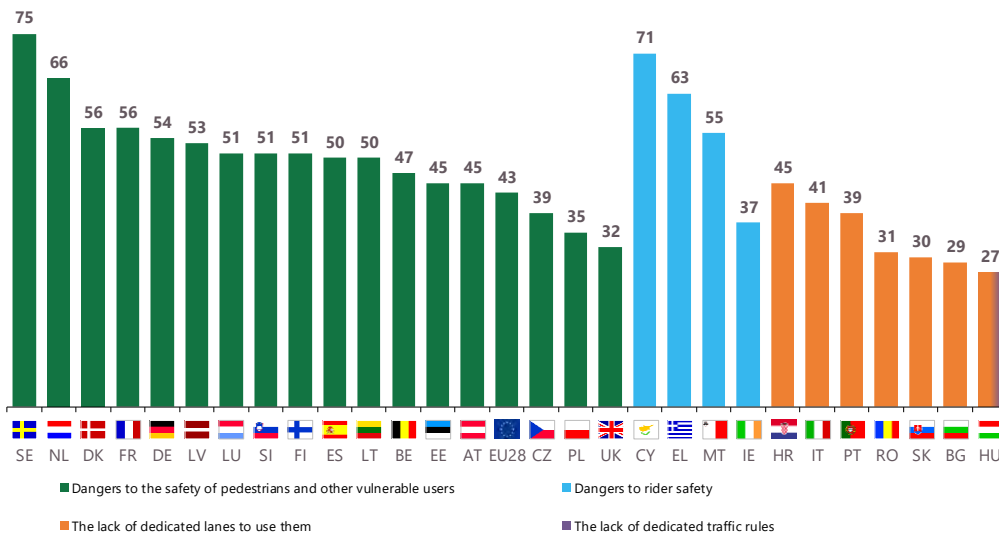


Base: all respondents (n= 27,565)

<sup>12</sup> QA10 Let's now discuss about e-scooters. What do you see as key challenges to address as regards e-scooters in urban areas?

In 17 countries, respondents are most likely to consider dangers to the safety of pedestrians and vulnerable users as a key challenge for e-scooters in urban areas. Dangers to rider safety is considered the main challenge in four countries, while a lack of dedicated lanes is considered the key challenge in six countries. In Hungary respondents are equally likely to mention a lack of dedicated lanes and a lack of dedicated traffic rules.

**QA10** Let's now discuss about e-scooters. What do you see as key challenges to address as regards e-scooters in urban areas? (MULTIPLE ANSWERS POSSIBLE) (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: all respondents (n= 27,565)

### c. Future of personal mobility

#### A single ticket for all urban journeys would be most useful for personal mobility

Respondents were asked what they would find most useful for their future personal mobility. The chart below illustrates the results combining the first response with all other responses<sup>13</sup>.

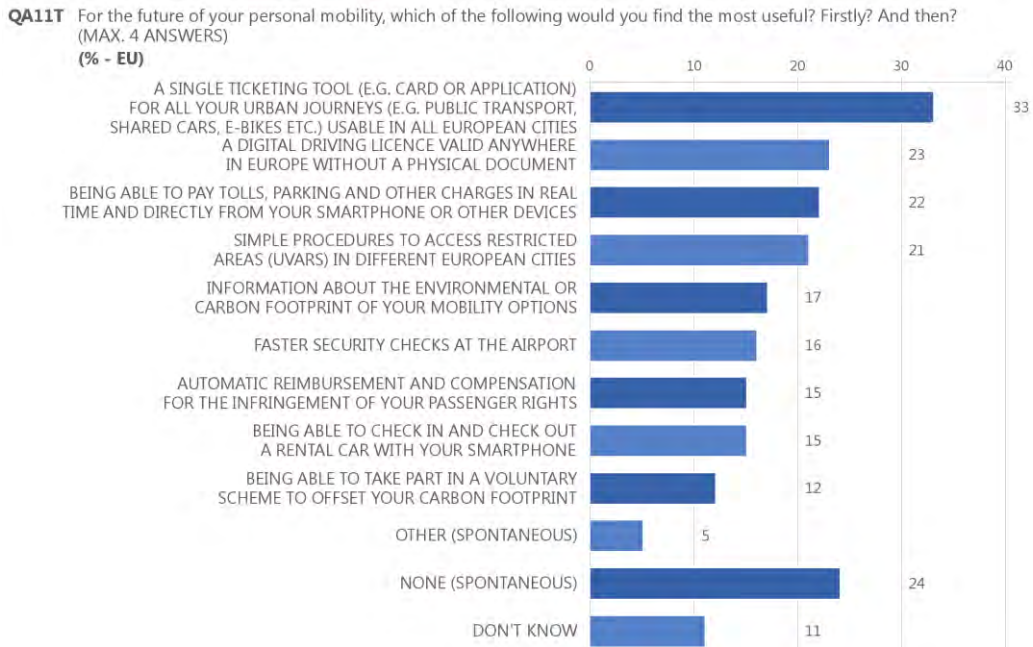
A single ticketing tool for all urban journeys in any European city is mentioned by one third (33%). More than one in five mention a digital driving license valid anywhere in Europe (23%), the ability to pay tolls, parking and other charges in real time directly from a smartphone or other device (22%), or simple procedures to access restricted areas (UVARs) in different European cities (21%).

Almost one in five (17%) say information about the environmental or carbon footprint of their mobility options would be most useful, while 16% mention faster security checks at the airport, and 15% say and automatic reimbursement and compensation for the infringement of their passenger rights, or being able to check in and check out a rental car with a smartphone would be most useful.

Just over one in ten (12%) say being able to take part in a voluntary scheme to offset their carbon footprint. Almost one quarter (24%) say none of these would be useful.

When analysing results for the EU27, there is a difference of 1pp among those who mention faster security checks at the airport (14%) and automatic reimbursement and compensation for the infringement of their passengers' rights (16%). There is a difference of 2pp among those who say simple procedures to access restricted areas (UVARs) in different European cities (23%).

<sup>13</sup> QA11T - For the future of your personal mobility, which of the following would you find the most useful? Firstly? And then?

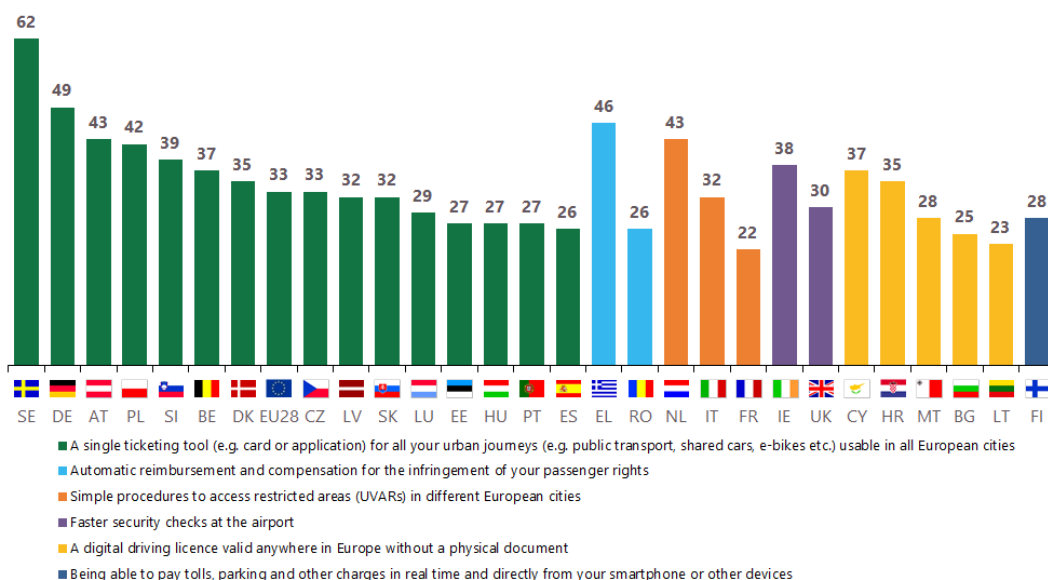


Base: all respondents (n= 27,565)

In 15 countries, a single ticketing tool is most mentioned as being useful for future personal mobility. A digital driving license is most mentioned in five countries, and simple procedures to access restricted areas in different European cities is the most mentioned in three countries.

Faster security checks at airports and automatic reimbursement and compensation for infringement of passenger rights are the most mentioned in 2 countries each, while in Finland being able to pay tolls, parking and other charges in real time from a smartphone or other device is most often mentioned.

**QA11T** For the future of your personal mobility, which of the following would you find the most useful? Firstly? And then? (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: all respondents (n= 27,565)

## II. LONG-DISTANCE MOBILITY

This second part of the report focuses on long-distance mobility. The frequency of journeys of 300km or more is discussed, as well as the most commonly used mode of transport for these journeys and the reasons for choosing this particular mode. The reasons for choosing to travel by plane are considered, as are respondents' opinions about the biggest problems for long distance journeys.

### 1. Frequency of long-distance journeys

#### The majority of respondents have made at least one trip of 300km or more in the last 12 months

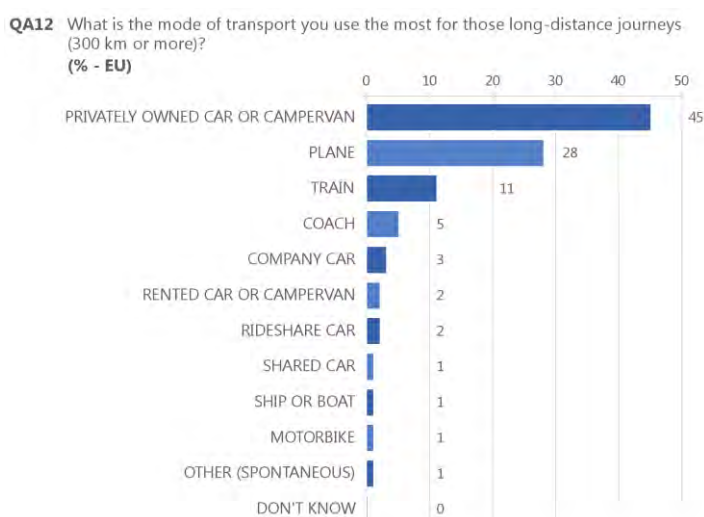
More than six in ten (62%) respondents have made a domestic or international journey of 300km or more in the past 12 months<sup>14</sup>. Just over one in five say they have made one (21%) or two or three (23%) such journeys. Almost one in ten (8%) have made four or five and 10% have made more than five journeys if this distance in the past 12 months. Almost four in ten (38%) have not made any journeys of this length in the last 12 months. There has been almost no change since 2014.

When analysing results for the EU27, there is a difference of 1pp among those who say one (22%) and four or five (8%).

### 2. The most frequently used modes of transport for long-distance journeys

#### Private cars or campervans are the most common means of transport for trips of 300km or more

Amongst respondents who had taken at least one trip of 300km or more in the past 12 months, 45% say most of these trips were made by a private car or campervan. Almost three in ten (28%) say they were mostly by plane, while 11% say they were predominantly train trips. One in twenty (5%) say the trips were mainly by coach, while other modes of transport are mentioned by 3% or less.



Base: respondents who have made journeys of 300km or more in the last 12 months (n= 17,106)

<sup>14</sup> SD2 How many domestic or international journeys of 300 km or more have you made in the last 12 months?

In 22 countries, a privately-owned car or campervan is the most common mode of transport for these trips, while planes are the most common mode for the remaining six countries.

### 3. Reasons for using different modes of transport for long-distance journeys

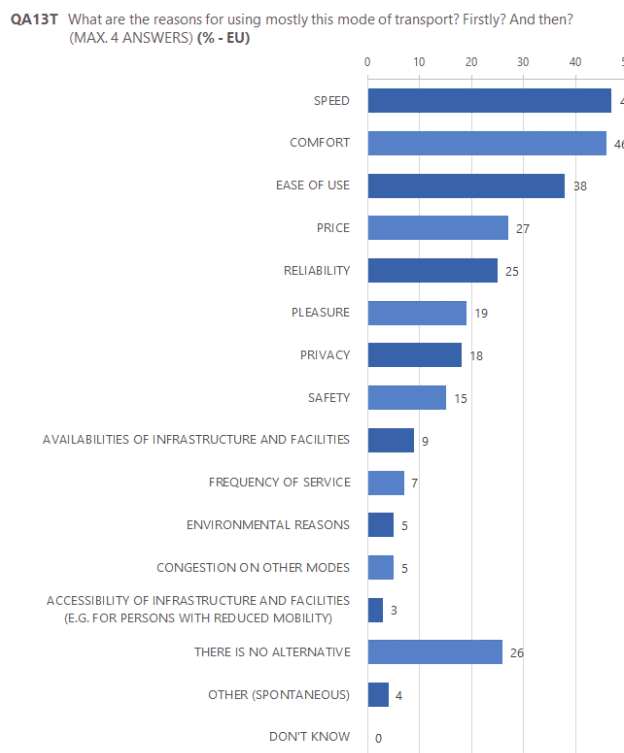
#### Speed and comfort are the primary reasons for using the main mode of transport for long distance trips

Respondents who made at least one long distance journey in the past 12 months were asked the reasons for choosing the main mode of transport for these trip(s).

The chart below illustrates all the answers (first response and any others) given by respondents<sup>15</sup>. Speed (47%) and comfort (46%) are the only reasons for choosing the main mode of long-distance transport given by at least four in ten respondents. Ease of use is mentioned by almost four in ten (38%), with price given as a reason by 27% and reliability by 25%.

Almost one in five (19%) say pleasure was a reason, while 18% mention privacy and 15% mention safety. Almost one in ten say the availability of infrastructure and facilities was a reason (9%), while 7% mention the frequency of the service and 5% mention environmental reasons or congestion on other modes. Just 3% mention the accessibility of infrastructure and facilities. For more than one quarter (26%) the choice was made because there is no alternative.

When analysing results for the EU27, there is a difference of 1pp among those who mention comfort (17%), ease of use (14%), environmental reasons (2%) and those who say there is no alternative (15%).

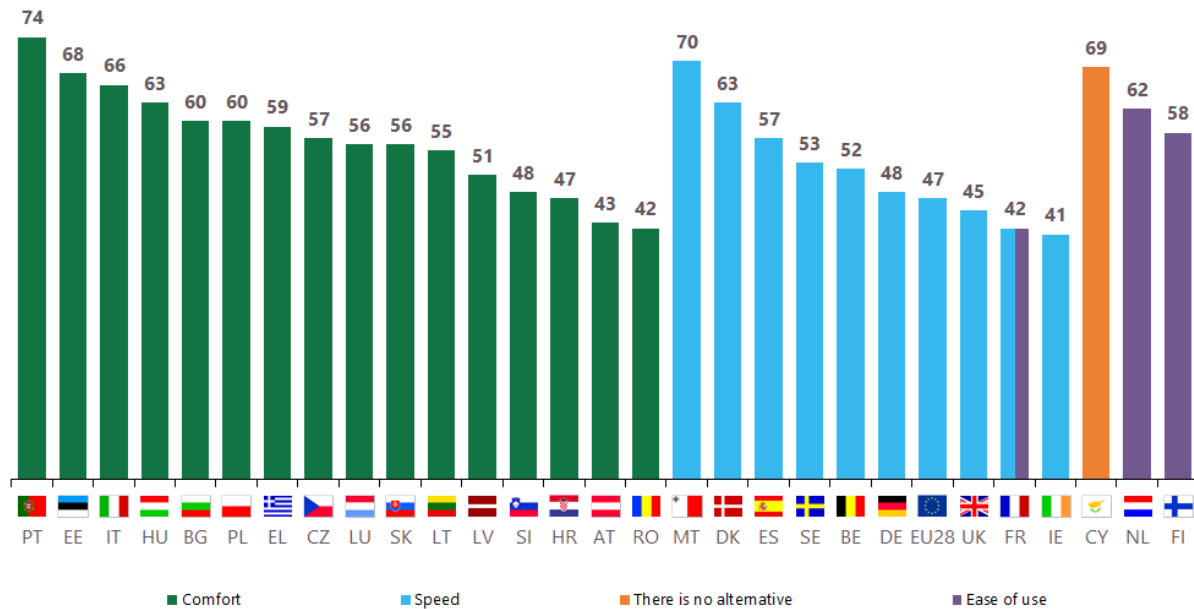


Base: respondents who have made journeys of 300km or more in the last 12 months and mention their main mode of transport (n= 17,078)

<sup>15</sup> QA13T - What are the reasons for using mostly this mode of transport? Firstly? And then?

In 15 countries, comfort is the main reason for choosing a mode of long-distance transport, while speed is the main reason in nine countries. In France speed and ease of use are equally mentioned, while ease of use is the most mentioned reason in the Netherlands and Finland. Cyprus is the only country where the most mentioned reason is that there is no alternative.

**QA13T** What are the reasons for using mostly this mode of transport? Firstly? And then?  
 (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: respondents who have made journeys of 300km or more in the last 12 months and mention their main mode of transport (n= 17,078)

**The most common reason for travelling by plane is that it is faster**

The overall results show that 63% of all respondents travel by plane at least occasionally<sup>16</sup>. Respondents were asked why they use this mode of transport – and the results below are based just on those respondents who travel by plane at least occasionally.

Just over half (51%) of respondents who travel by plane at least occasionally say they do so because it is faster. This is by far the most mentioned reason, followed by not having any other option (27%) or air travel being more convenient (26%).

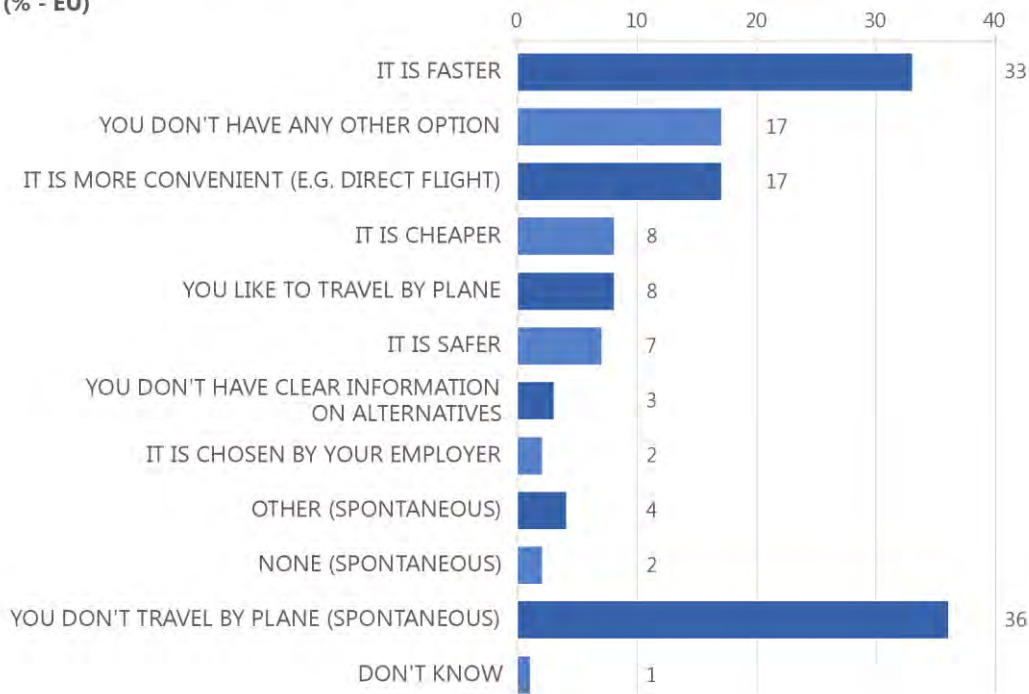
More than one in ten say they travel by plane because it is cheaper (13%), they like to travel by plane (12%) or because it is safer (11%). One in twenty (5%) say they don't have clear information on alternatives, while 3% say this mode is chosen by their employer.

When analysing results for the EU27, there is a difference of 1pp among those who say they do not have any other option (16%), those who say they travel by plane because it is more convenient (16%) and those who spontaneously say they don't travel by plane (37%).

<sup>16</sup> QA15R If you occasionally or regularly travel by plane, why do you use this mode of transport? (MULTIPLE ANSWERS POSSIBLE)



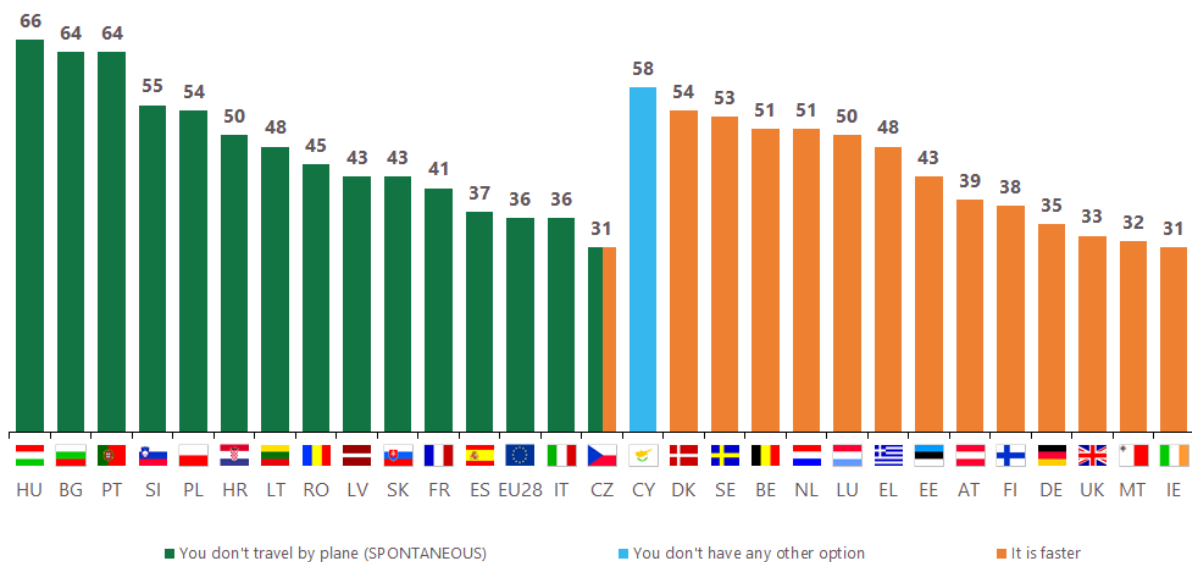
**QA15** If you occasionally or regularly travel by plane, why do you use this mode of transport?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



Base: all respondents (n= 27,565)

Cyprus is the only country where the main reason for travelling by plane is that they don't have any other option. In every other country, planes are primarily chosen because they are faster.

**QA15** If you occasionally or regularly travel by plane, why do you use this mode of transport?  
(MULTIPLE ANSWERS POSSIBLE) (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: all respondents (n= 27,565)

### 3. Main challenges of long-distance journeys

#### The cost of transport is the main problem for long distance journeys

All respondents were asked what they saw as the biggest problem in long-distance journeys.

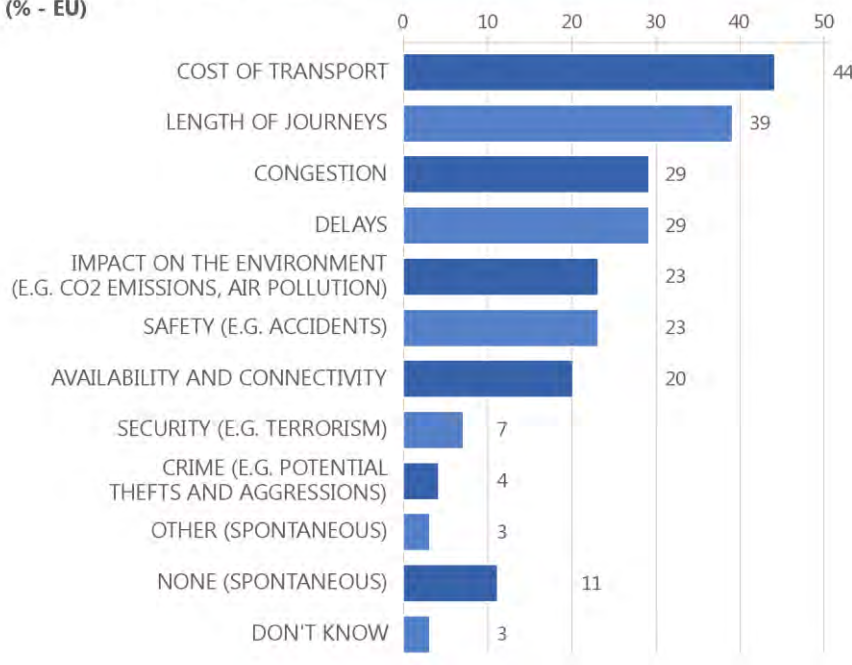
The chart below shows the result of all the respondents' answers to this question (the first mentioned problem, and any others mentioned)<sup>17</sup>. Across all answers, the cost of transport is the most mentioned factor (44%), followed by the length of journeys (39%), congestion and delays (29% each). Almost one quarter (23%) mention the environmental impact, while the same proportion mention safety. One in five mention availability and connectivity as the biggest problem. Fewer than one in ten consider security (7%) or crime (4%) as the biggest problems.

Just over one in ten (11%) say none of these issues are big problems.

When analysing results for the EU27, there is a difference of 1pp among those who mention safety (24%), availability and connectivity (21%), security (8%), crime (5%) and those who say none (10%).

There is a difference of 2pp among those who say delays (27%).

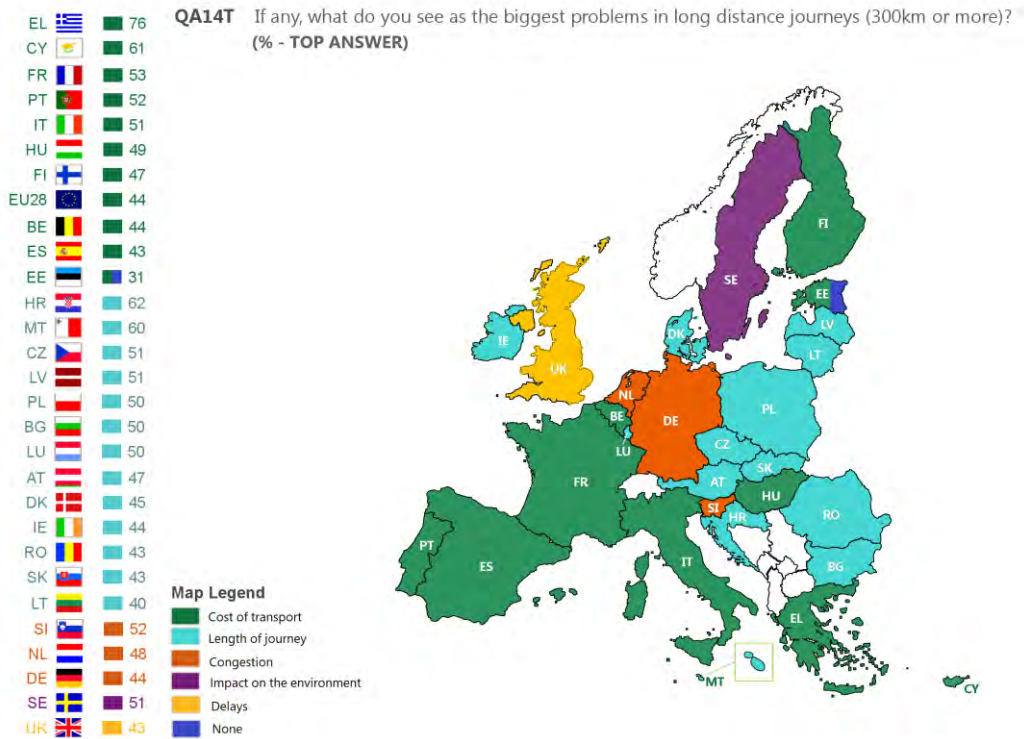
**QA14T** If any, what do you see as the biggest problems in long distance journeys (300km or more)? Firstly? And then? (MAX. 3 ANSWERS)  
(% - EU)



Base: all respondents (n= 27,565)

<sup>17</sup> QA14T - If any, what do you see as the biggest problems in long distance journeys (300km or more)? Firstly? And then?

In 13 countries, the length of the journey is the most mentioned problem, while the cost of transport is the most mentioned in nine countries. In three countries congestion is the most mentioned problem for long-distance journeys, while delays and environmental impact are the most mentioned problem in one country each. The map highlights that the length of the journey is more often the main problem for those in eastern parts of the EU, while cost is the primary factor in southern and western regions.



Base: all respondents (n= 27,565)

### III. SUSTAINABILITY

This final part of the report focusses on sustainability issues, both in daily mobility and for long-distance journeys. The willingness of car-users to switch to a more sustainable mode of daily mobility is considered, as well as the conditions that would need to be met for them to switch. The reasons car users don't want to switch to more environmentally friendly alternatives are also discussed. Respondents' willingness to pay more for more sustainable modes of daily transport is reviewed, as well as the reasons they are not ready to pay more.

Factors that would influence respondents to switch to a more sustainable mode of long-distance transport, and a willingness to pay more are also discussed.

In the final section, the prevalence of home delivery is presented, as well as the more sustainable options respondents would be willing to consider.

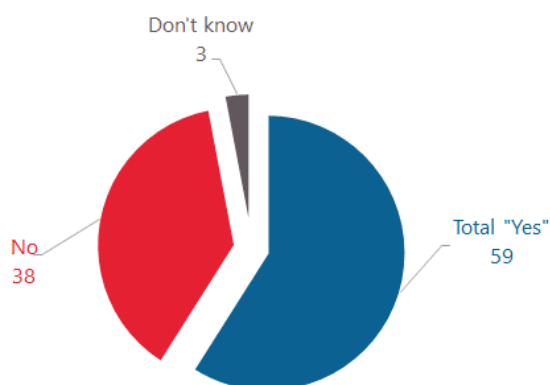
#### 1. Willingness to switch to more sustainable modes of transport in daily mobility

##### **The majority of regular car users are ready to switch to more environmentally friendly forms of transport for their daily mobility**

Respondents who use a car (other than a zero-emission car) on a typical day were asked about switching a significant part of their daily mobility to a more environmentally friendly form of transport<sup>18</sup>. Almost six in ten (59%) say they are ready to switch: 21% are definitely ready and 38% say they are probably ready. Almost four in ten (38%) say they are not ready, with 15% saying they are definitely not ready. A small proportion (3%) sat they don't know.

There are no differences when analysing the results for the EU27.

**QA5** Would you be ready to switch a significant part of your daily mobility to more environmentally friendly modes of transport (e.g. ride-sharing, zero-emission vehicles, public transport, cycling or walking)? (% - EU)



(Sept 2019)

Base: all respondents who use cars other than zero-emission cars (n= 16,717)

<sup>18</sup> QA5 Would you be ready to switch a significant part of your daily mobility to more environmentally friendly modes of transport (e.g. ride-sharing, zero-emission vehicles, public transport, cycling or walking)?

In 24 countries, at least half of all regular car users are ready to switch to more environmentally friendly forms of transport for their daily mobility, although there is considerable variation. At least seven in ten of these respondents in Luxembourg (77%), Sweden (71%), and Spain and Malta (both 70%) say they are ready to switch, compared to 39% in Portugal and 41% in Bulgaria and Lithuania.

**The main condition for switching to more environmentally friendly transport is that it does not cost more**

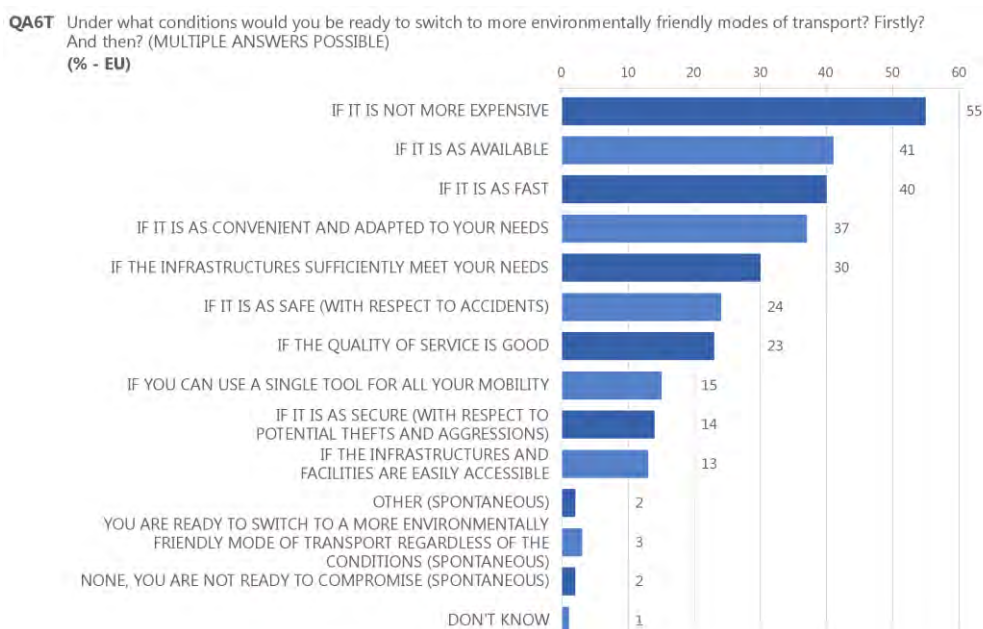
Amongst respondents ready to switch to more sustainable modes of transport, the main condition is that it would not be more expensive (55%)<sup>19</sup>. This is the only condition mentioned by at least half. Around four in ten say the alternate transport would need to be as available (41%) or as fast (40%), while almost as many (37%) say it would have to be as convenient and adapted to their needs.

Three in ten (30%) say the infrastructure would need to sufficiently meet their needs in order to switch to a more environmentally friendly mode of transport, while more than one in five say it would need to be as safe (24%), or that the quality would need to be as good (23%).

More than one in ten say they would need to be able to use a single tool for all their mobility (15%), that the alternate transport would need to be as secure (14%) or that the infrastructures and facilities would need to be easily accessible (13%).

Fewer than one in five (3%) are ready to switch regardless of the conditions.

When analysing results for the EU27, there is a difference of 1pp among those who say they would be ready to switch if it is as available (42%), it is as convenient and adapted to their needs (38%), if the infrastructures sufficiently meet their needs (31%), if the quality of the service is good (22%), if they can use a single tool for all their mobility (16%), and if the infrastructures and facilities are easily accessible (14%). There is also a difference of 1pp among those who say other (3%) and none (1%).

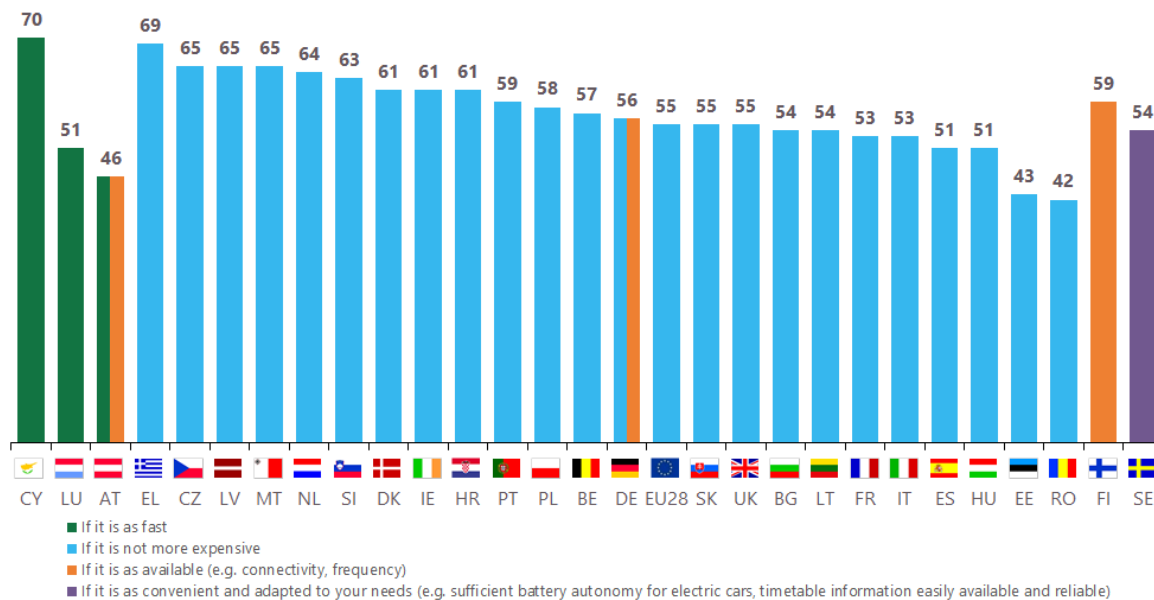


Base: respondents who would be ready to switch to more sustainable modes of transport (n= 9,877)

<sup>19</sup> QA6T - Under what conditions would you be ready to switch to more environmentally friendly modes of transport? Firstly? And then?

In 23 countries, the most mentioned condition is that the alternate transport is not more expensive. Being just as fast is the most mentioned in two countries, while in Austria this is most mentioned along with equal availability. In Finland equal availability is the most mentioned condition, while Sweden is the only country where equal convenience and being adapted to their needs is the most mentioned condition.

**QA6T** Under what conditions would you be ready to switch to more environmentally friendly modes of transport? Firstly? And then? (% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: respondents who would be ready to switch to more sustainable modes of transport (n= 9,877)

### A lack of alternatives and perceived lack of adaption to personal needs are the main reasons for not switching to a more environmentally friendly mode of daily transport

Respondents who said they are not ready to switch a significant part of their daily mobility to more environmentally friendly modes of transport were asked why not<sup>20</sup>. Almost four in ten say they don't have an alternative (39%), while 36% think more sustainable modes are not adapted to their needs.

More than one quarter say they think other modes take too long (28%), are too expensive (26%), or that they prefer to use a conventional fuelled car (26%). Almost as many (24%) say they don't like public transport.

A lack of public transport in their area is the reason why 17% of these respondents are not ready to switch, while 14% don't think that their own personal decision would make any difference to the environment and 13% don't have clear information on alternatives.

Almost one in ten (8%) think alternatives are not safe enough, while 5% think they are not secure enough.

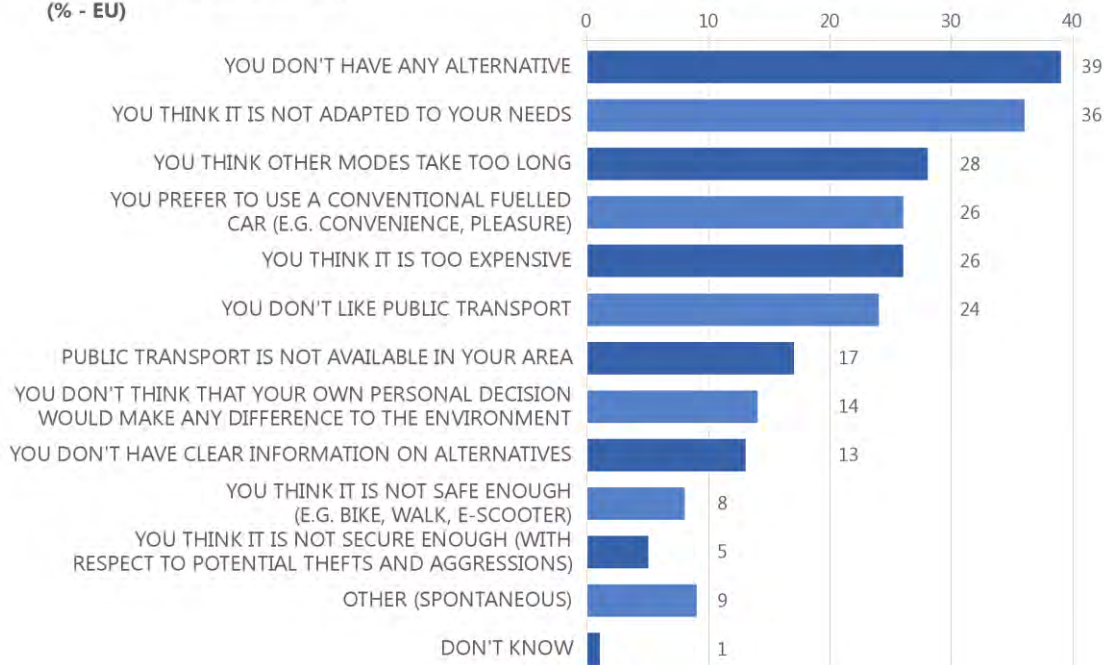
When analysing results for the EU27, there is a difference of 1pp among those who say the other modes take too long (29%), those who prefer to use a conventional fuelled car (27%), those who think it is too expensive (25%), those who don't like public transport (24%), those who don't think that your own personal decision would make any difference to the environment (15%), those who don't have clear information on alternatives (14%) and those who say other (8%).

<sup>20</sup> QA6T2 - Why don't you want to switch to more environmentally friendly modes of transport? Firstly? And then?



There is a difference of 2pp among those who think it is not adapted to their needs (38%).

**QA6T2** Why don't you want to switch to more environmentally friendly modes of transport? Firstly? And then?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



Base: respondents who would not be ready to switch to more sustainable modes of transport (n= 6,354)

## 2. Willingness to pay more for more sustainable modes of transport in daily mobility

### Almost half of all respondents would be willing to pay more for more sustainable modes of daily transport

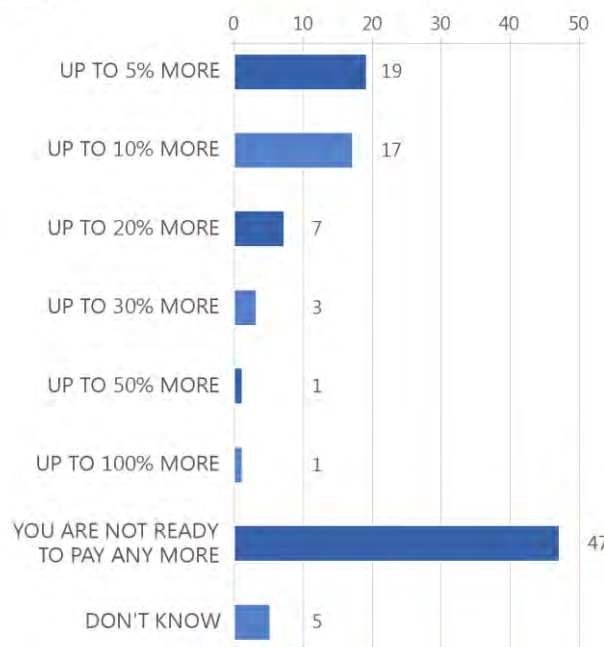
All respondents were asked how much more they would be willing to pay for their daily transport if it was significantly better for the environment<sup>21</sup>. Overall, 48% would be willing to pay more. Almost one in five (19%) would be willing to pay up to 5% more, while 17% would be willing to pay up to 10% more.

Almost one in ten (7%) would be willing to pay up to 20% more, while 3% would be willing to pay up to 30% more. Few would be willing to pay up to 50% (1%) or 100% more (1%).

However, almost half (47%) would not be willing to pay more for more sustainable modes of daily transport.

When analysing results for the EU27, there is a difference of 1pp among those who say up to 5% more (20%), up to 10% more (16%), up to 30% more (2%), up to 50% more (2%) and those who are not ready to pay more (48%).

**QA7** How much more would you be willing to pay for your daily personal transport cost, if this was significantly better for the environment? (% - EU)

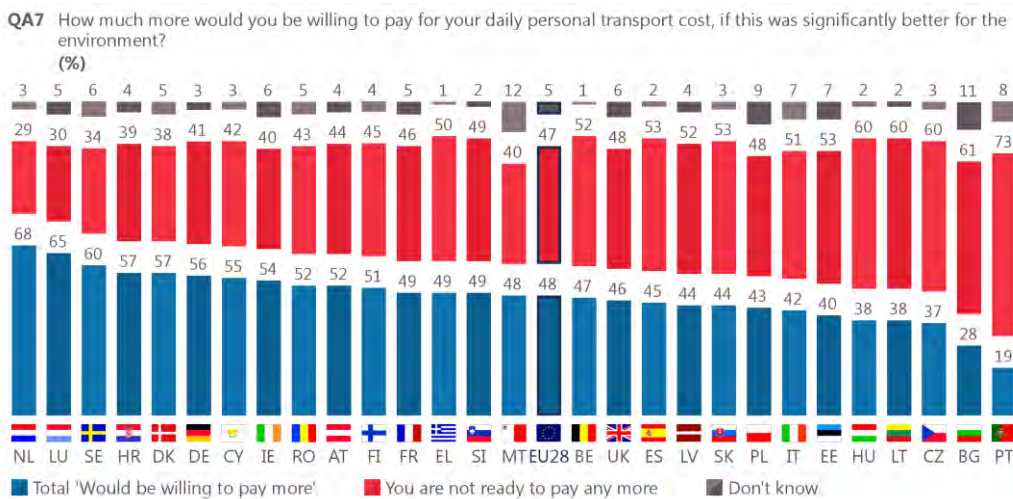


Base: all respondents (n= 27,565)

The proportion of respondents who would be willing to pay more for more environmentally-friendly daily transport varies considerably: from 68% in the Netherlands, 65% in Luxembourg and 60% in Sweden to 19% in Portugal, 28% in Bulgaria and 37% in Czechia.

<sup>21</sup> QA7 How much more would you be willing to pay for your daily personal transport cost, if this was significantly better for the environment?

Overall there are 11 countries where at least half say they would be willing to pay more.



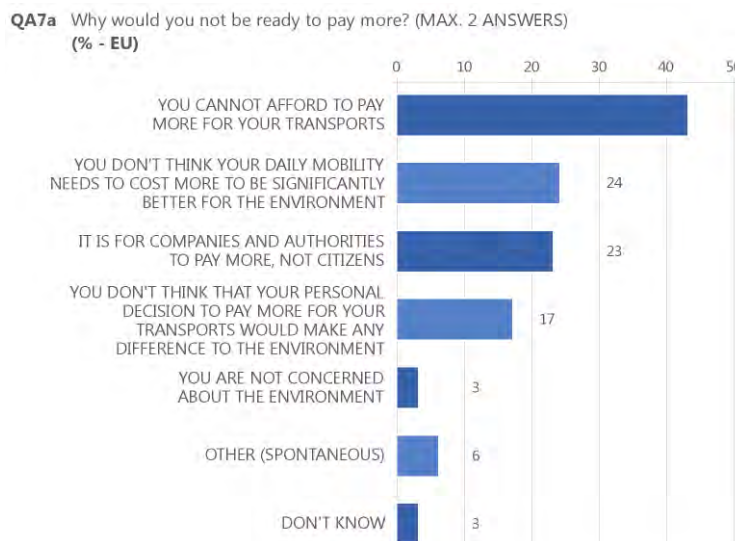
Base: all respondents (n= 27,565)

**An inability to afford it is the main reason respondents are not ready to pay more for more sustainable daily transport**

Amongst respondents who are not ready to pay more for more environmentally-friendly daily transport, 43% say it is because they cannot afford to pay more. More than one in five say they don't think their daily mobility needs to cost more to be significantly better for the environment (24%) or that it is for companies and authorities to pay more, not citizens (23%).

Almost one in five (17%) say they don't think their personal decision to pay more for their transports would make any difference to the environment. Only a few (3%) say they are not concerned about the environment.

When analysing results for the EU27, there is a difference of 1pp among those who say they would not be ready to pay more because they don't think their daily mobility needs to cost more to be significantly better for the environment (25%) and those who say they don't know (2%). There is a difference of 2pp among those who say they would not be ready to pay more because they think it is for companies and authorities to pay more, not citizens (25%)



Base: respondents who would not be ready to pay more (13,016)

### 3. Factors that would influence a switch to more sustainable long-distance transport options

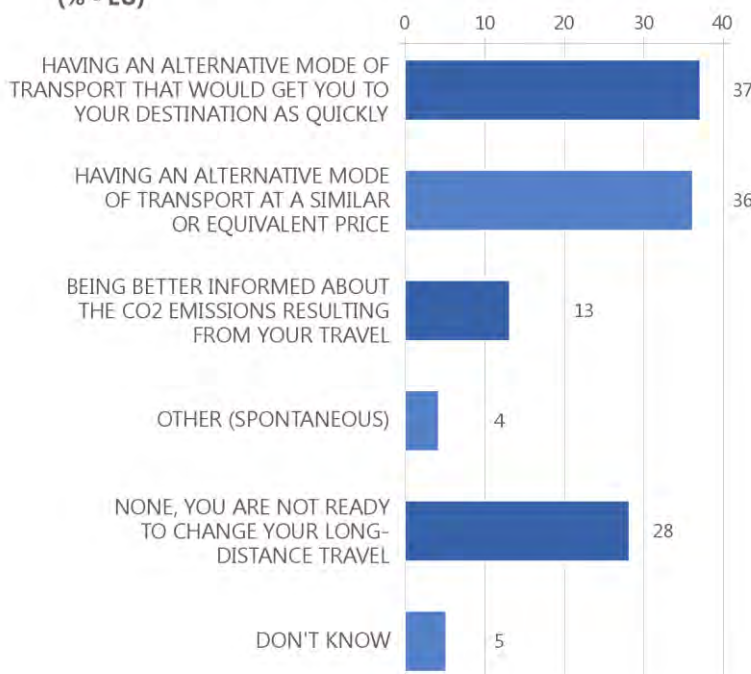
#### **An alternative that was just as fast or a similar price would influence respondents towards a more environmentally friendly solution for long distance travel**

More than one third of all respondents say having an alternative mode of transport that would get them to their destination as quickly (37%), or an alternative mode of transport at a similar or equivalent price (36%) would influence their long-distance travel planning in favour of a more environmentally-friendly solution.<sup>22</sup> Just over one in ten (13%) say being better informed about the CO<sub>2</sub> emissions resulting from your travel would influence them. One in twenty (5%) say they don't know.

However, almost three in ten (28%) say they are not ready to change their long-distance travel.

When analysing results for the EU27, there is a difference of 1pp among those who say that having an alternative mode of transport that would get them to their destination as quickly (38%) would influence their long-distance travel planning in favour of a more environmentally friendly solution. There is also a difference of 1pp among those who say they are not ready to change their long-distance travel (27%).

**QA17** What could influence your long distance (300km or more) travel planning in favour of a more environmentally friendly solution? (MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



Base: all respondents (27,565)

<sup>22</sup> QA17 What could influence your long distance (300km or more) travel planning in favour of a more environmentally friendly solution? (MULTIPLE ANSWERS POSSIBLE)

#### 4. Willingness to pay more for more sustainable modes of transport in long-distance journeys

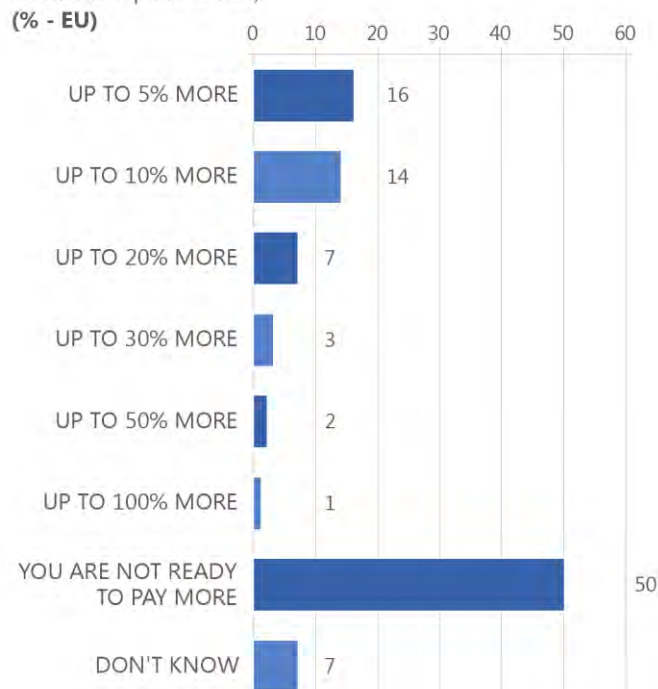
##### **Just over four in ten would be willing to pay more for air travel to offset its environmental impact**

All respondents were asked how much more they would be willing to pay for air travel to offset its environmental impact<sup>23</sup>. Overall, 43% say they would be willing to pay more, with up to 5% more (16%) or up to 10% more (14%) the most common acceptable increases. Fewer than one in ten would be willing to pay up to 20% more (7%), while fewer than one in twenty would be willing to pay up to 30% (3%), up to 50% (2%) or up to 100% (1%) more.

The majority (50%), however, are not willing to pay more for air travel, while 7% say they don't know.

When analysing results for the EU27, there is a difference of 1pp among those who say they would be willing to pay up to 10% more (13%) for air travel to offset its environmental impact and those who say they don't know (8%).

**QA16** How much more would you be willing to pay for air travel to offset its environmental impact? (e.g. to offset CO<sub>2</sub> emissions or to use cleaner but more expensive fuel)?

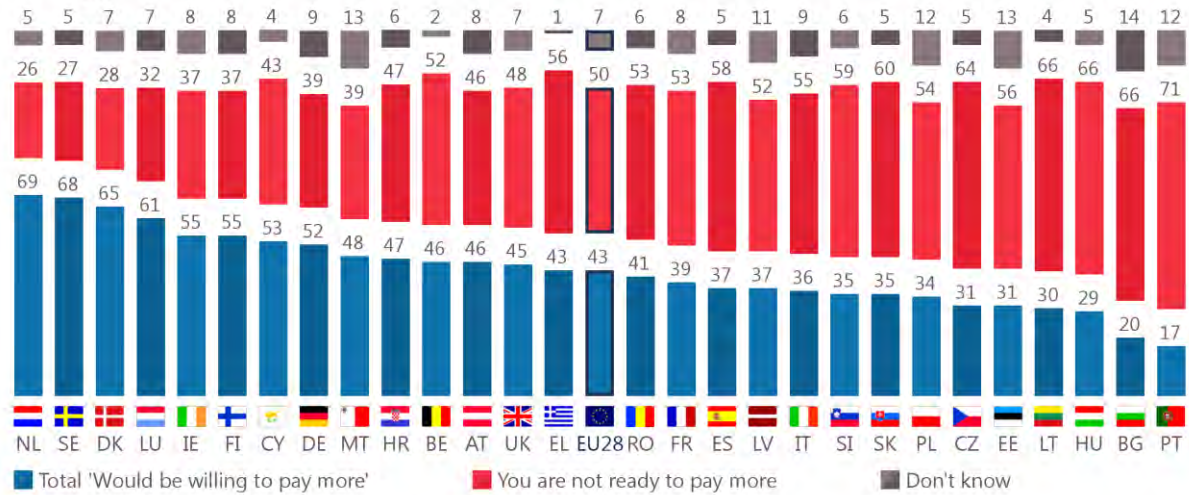


Base: all respondents (27,565)

<sup>23</sup> QA16 How much more would you be willing to pay for air travel to offset its environmental impact? (e.g. to offset CO<sub>2</sub> emissions or to use cleaner but more expensive fuel)?

The proportion who would be willing to pay more for air travel varies considerably: from 69% in the Netherlands, 68% in Sweden and 65% in Denmark to 17% in Portugal 20% in Bulgaria and 29% in Hungary.

**QA16** How much more would you be willing to pay for air travel to offset its environmental impact? (e.g. to offset CO2 emissions or to use cleaner but more expensive fuel?)  
(%)



Base: all respondents (27,565)

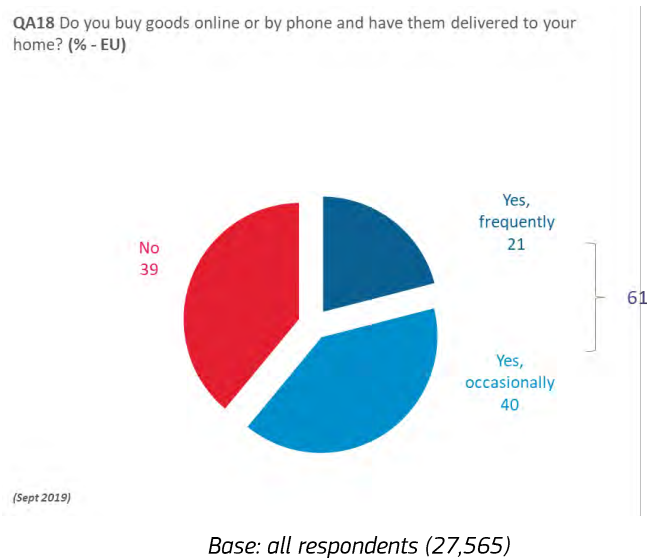


## 5. Home delivery

### The majority of respondents buy goods online or on the phone and have them delivered

More than six in ten (61%) respondents say they buy goods online or by phone and have them delivered to their home: 21% do this frequently and 40% do it occasionally. Almost four in ten (39%) say they never do this<sup>24</sup>.

When analysing results for the EU27, 18% of the respondents say they buy goods online or by phone and have them delivered to their home frequently and 41% do it occasionally. More than four in ten respondents (41%) say they never do this.



The EU average of 61% conceals considerable variation in home delivery across countries, although there are 18 countries overall where at least half say they order goods online or by phone and have them delivered. This behaviour is most common in the Netherlands (89%), the United Kingdom (78%) and Sweden (77%), and least common amongst respondents in Portugal (33%), Romania and Hungary (each 40%).

Respondents in the United Kingdom (40%), and the Netherlands and Denmark (both 31%) are the most likely to say they **frequently** order goods online or by phone and have them delivered, while those in Croatia (5%) and Romania (6%) are the least likely to say this.

### Picking up deliveries at a pick-up point is the most mentioned option for making deliveries more environmentally-friendly

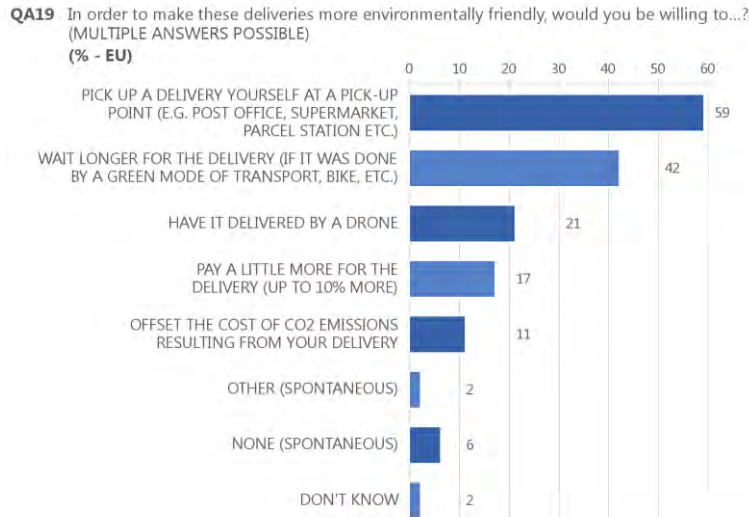
Respondents who buy goods online or by phone and have them delivered to their home were asked what they would be willing to do to make their deliveries more environmentally friendly<sup>25</sup>.

Almost six in ten (59%) would pick up a delivery themselves at a pick-up point, while 42% would wait longer for the delivery if it was done by a green mode of transport. Just over one in five (21%) would have their item(s) delivered by drone, while 17% would pay a little more for delivery, and 11% would offset the cost of CO<sub>2</sub> emissions from their delivery. Just over one in twenty (6%) say they would not be willing to do any of these things.

<sup>24</sup> QA18 Do you buy goods online or by phone and have them delivered to your home?

<sup>25</sup> QA19. In order to make these deliveries more environmentally friendly, would you be willing to...?

When analysing results for the EU27, there is a difference of 1pp among those who are willing to wait longer for delivery (43%) and those who are willing to offset the cost of CO<sub>2</sub> emissions resulting from their delivery (12%). There is also a difference of 1pp among those who say none (5%).



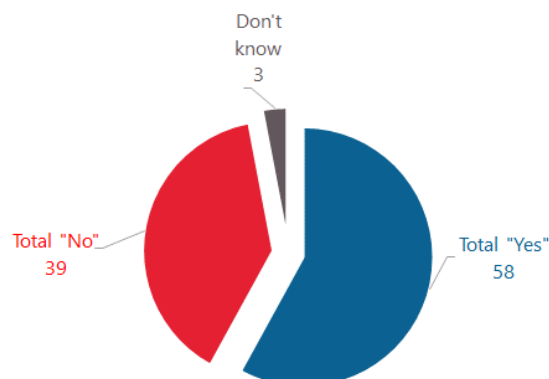
Base: respondents who order goods online or via phone and have them delivered at home (16,827)

**Almost six in ten say more information about the CO<sub>2</sub> emissions generated by their delivery would influence their choice of delivery method**

Amongst those who order goods by phone online for home delivery, 58% say more information about the CO<sub>2</sub> emissions generated by their delivery would influence their choice of delivery method<sup>26</sup>. Almost one in five (16%) say it would definitely influence them while 42% say it probably would. Almost four in ten (39%) say this information would not influence them, with 13% saying it definitely would not.

When analysing results for the EU27, 58% of the respondents say more information about the CO<sub>2</sub> emissions generated by their delivery would influence their choice of delivery method, while 38% say it wouldn't.

**QA20** Would more information about the CO<sub>2</sub> emissions generated by your delivery influence your choice of delivery method?  
(% - EU)



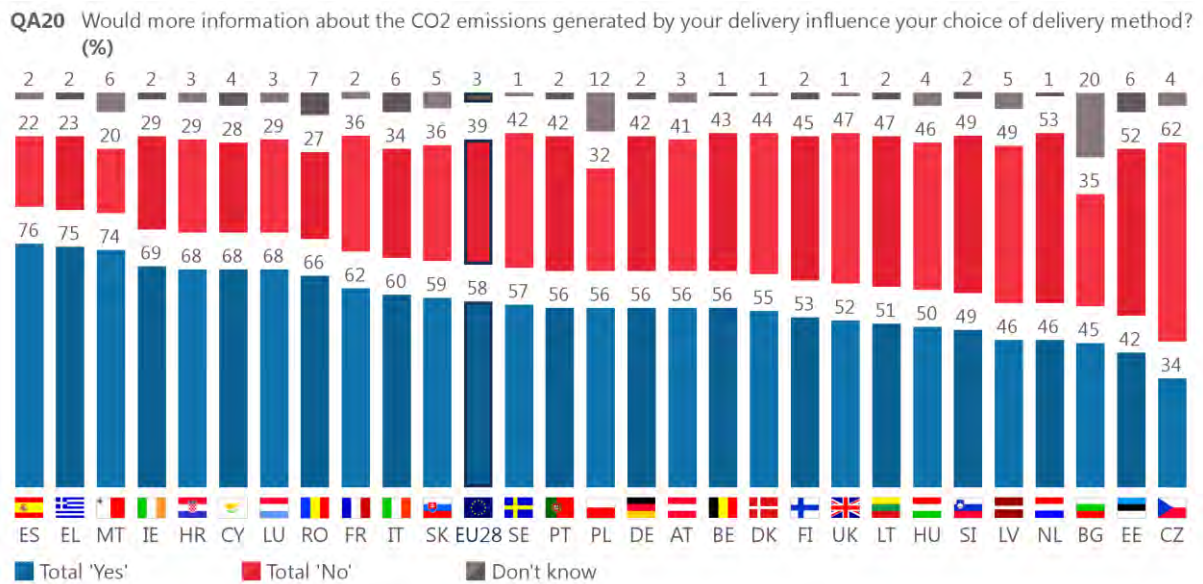
(Sept 2019)

Base: respondents who order goods online or via phone and have them delivered at home (16,827)

<sup>26</sup> QA20 Would more information about the CO<sub>2</sub> emissions generated by your delivery influence your choice of delivery method?

In 22 countries at least half of these respondents say information on the CO<sub>2</sub> emissions from their delivery would influence their choice of methods, with those in Spain (76%), Greece (75%) and Malta (74%) the most likely to say this. At the other end of the scale 34% in Czechia, 42% in Estonia and 45% in Bulgaria also say this would influence their choice.

Respondents in Cyprus (31%), Spain (27%) and France (25%) are the most likely to say this information would definitely influence their choice, particularly compared to those in Estonia and Poland (both 5%).



Base: respondents who order goods online or via phone and have them delivered at home (16,827)

## CONCLUSION

Private cars running on conventional fuel are the dominant form of daily mobility in the European Union. On a typical day, just over six in ten respondents use a car as one of their modes of transport and this increases to almost three quarters of respondents living in rural areas. Car users are also overrepresented amongst men, those aged 25-54, and in households with more than one child. Nine in ten cars used for daily mobility are private vehicles, and fewer than one in ten runs on alternate fuels. Just over four in ten respondents walk (more than 30 minutes a day) as part of their daily transport while more than one quarter use urban public transport. These two modes round out the top three forms of daily mobility.

Although comfort and speed are the main reasons for choosing a form of daily mobility, just over one third say they have no other alternative. Furthermore, a lack of other options is much more prevalent in rural villages: more than four in ten respondents give this reason, compared to one quarter who live in large towns. A lack of alternatives is also the most common reason for choosing a particular mode of daily transport for respondents Cyprus, Bulgaria and Romania. Environmental reasons rank 10<sup>th</sup> as a reason for choosing a particular form of daily mobility. This reason is mentioned by just one in ten, and is more likely to be given by non-car users than car users. Car users are most likely to say comfort is their main reason for choosing a car, walkers most often say their choice is made for pleasure, while public transport users most often say there is no alternative.

The main challenges for transport are mentioned by more than three in ten: cost, congestion, and availability/connectivity. Not surprisingly, congestion is a bigger problem for those living in large towns than for those living in rural villages. Damage to the environment is the fourth most mentioned challenge overall, but is the most mentioned challenge by respondents in Cyprus, France and Sweden. The results also highlight a disconnect between the reasons for using the main mode of transport, and the main challenges for transport. For instance, environmental damage is one of the most mentioned challenges for transport, but one of the least mentioned reasons for choosing a particular mode of transport.

Respondents have similar views regarding traditional taxi services and private hire vehicles, with availability and ease of booking seen as positive aspects of both. The results do highlight that the more urbanised a respondents' environment, the more likely they are to think these things are positive for both traditional taxi services and private hire vehicles. However, those living in rural areas are much more likely than their urban counterparts to say there are no traditional taxi services or private hire vehicles in their area.

More than four in ten respondents think greatest challenges posed by e-scooters in urban areas are dangers to the safety of pedestrians and other vulnerable users, while more than three in ten mention dangers to riders, the lack of dedicated traffic rules or the lack of dedicated lanes.

Asked to think about what would be most useful for their future personal mobility, one third mention a single ticketing tool usable in all EU cities, while just over one in five mention a digital driving license valid anywhere in Europe without a physical document or easy ways to pay tolls and other charges.

Just over six in ten respondents have undertaken a long-distance journey of at least 300km in the past 12 months. Private cars or campervans are the most common mode of long-distance travel (more than four in ten), while planes are mentioned by almost three in ten. Speed, comfort and ease of use are the main reasons for choosing a mode of long-distance transport, although more than a quarter say there is no alternative. For those who travel by plane, the majority do so because it is faster, although more than one in ten say they do not have any other option or that it is more convenient.

Across all respondents, cost is the most often mentioned problem of long-distance travel, and is also the most mentioned issue in nine Member States. However, the importance of cost is not solely based on a respondents' financial situation – it is the most mentioned issue regardless of financial situation.

The second most common problem of long-distance travel is the length of journey, and this is the most mentioned challenge in 13 countries. Although the impact on the environment is the most mentioned problem in Sweden, across the EU as a whole it is mentioned by just under one quarter and ranks fifth.

Almost six in ten respondents in the EU who use a car for their daily mobility are willing to switch to a more environmentally friendly mode of transport, but this overall result masks large variations between individual Member States. In addition, those who are most willing to switch are the young, current students and those who stayed in education for longer, and those living in cities.

Although personal financial situation is not an influential factor in willingness to switch, money is a key factor when respondents are asked about the necessary conditions for them to actually switch. More than half would switch if the alternative was not more expensive, while around four in ten say the alternative needs to be as available, or as fast. The requirement that the alternative is not more expensive is the most mentioned factor across all socio-demographic groups.

The main reason car users are not ready to switch to a greener form of daily transport is a lack of alternatives, and this is also the most common reason in eight Member States. This reason is more often given by those living in rural areas, and those over 40 years of age. The other main reasons for not switching are the belief that other modes are not adapted to their needs.

Respondents are divided when it comes to paying more for daily transport if it was significantly better for the environment: 48% would be willing to pay more and 47% who would not. Those willing to pay more are more likely to be aged 15-54, longer educated or students. Personal financial situation is not the only factor driving a willingness to pay more – almost three in ten of those who experience the most financial difficulties would be willing to pay more for greener daily transport. Most of those willing to pay more would be ready to pay up to 10% more.

For those who are not willing to pay more, more than four in ten say they cannot afford to. However more than one in five don't think transport needs to cost more to be greener, or think that it is companies and authorities – rather than individuals – that should pay more.

Turning to long-distance travel, respondents would be influenced towards greener options by alternatives that would be as quick or priced equally. However almost three in ten are not ready to change under any condition.

When it comes to air travel, more than four in ten are willing to pay more to offset the environmental impacts of this form of travel – mostly up to 10% more. There is considerable variation at a country level. In nine Member States at least a relative majority are willing to pay more, and in two equal proportions are willing and unwilling. In the remaining 17 countries the majority are not willing to pay more, although proportions vary from 52% in Belgium and Latvia to 71% in Portugal. Across the EU as a whole half say they are not willing to pay more. It is not only across countries that opinion varies, but also across socio-demographic groups. Those willing to pay more are more often found amongst 15-24 year olds, those who stayed in education for longer, managers, students and those who have made at least one long-distance journey in the past 12 months.

Turning from personal transport to home deliveries, more than six in ten order goods online or by phone and have them delivered. Amongst these respondents almost six in ten would be willing to pick up the delivery themselves and just over four in ten would wait longer in order to make the deliveries more environmentally friendly. Furthermore, almost six in ten agree more information about the CO<sub>2</sub> emissions of their delivery would influence their choice of delivery method. However, this result masks considerable variation: information on CO<sub>2</sub> emissions would have the greatest impact on respondents from Spain (76%) and Greece (75%) and the least in Czechia (34%).





