



BCG

THE BOSTON CONSULTING GROUP



April 2017

# European Mobilities Observatory

## First edition

*The expectations of Europeans in terms of mobility*

GAME CHANGERS



# Technical specifications



## SAMPLE

**10 018** individuals aged 15 years and over, including at least 1000 individuals in each of the surveyed countries.



## SURVEY DATE

From 23rd **February** to 28th **March** 2017.



## METHOD

Online survey.

Representative samples of the population aged 15 years and over in each of the surveyed countries

Quota method: gender, age, interviewee occupation, region and town category

A survey conducted for:



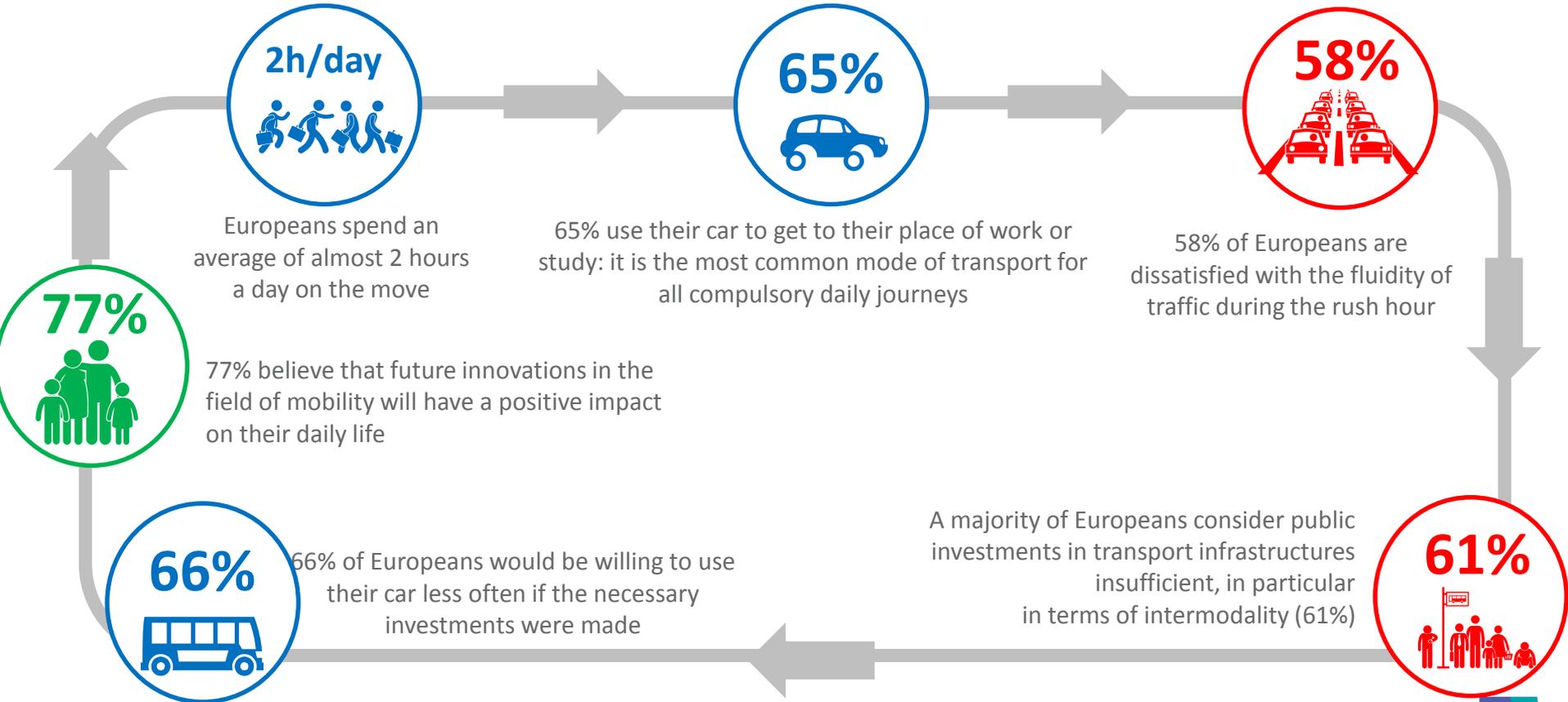
*This report has been produced in accordance with international standard ISO 20252 "Market, opinion and social research".  
This report was proofread by Amandine Lama, Account Director.*

# Countries surveyed

<b>Total</b>	<b>10 018</b>
Belgium	1 003
France	1 000
Germany	1 003
Greece	1 000
Ireland	1 000
Italy	1 000
Poland	1 001
Portugal	1 001
Slovakia	1 000
Spain	1 010



# KEY RESULTS





# MOBILITY, A KEY PART OF THE DAILY LIFE OF EUROPEANS

# Europeans spend an average of almost 2 hours per day on the move: by car, on foot, in public transport and on bicycle

Time spent on average: **9h35**

1h55 on average per day



Motorized vehicles

**3h58**

By car  
(personal or professional) **3h14**

Car pooling **24 mn**

Shared car **4 mn**

A two-wheeled motor vehicle **16 mn**



Active modes

**3h57**

On foot **3h18**

On bicycle (...) **39 mn**



Public transport

**1h40**

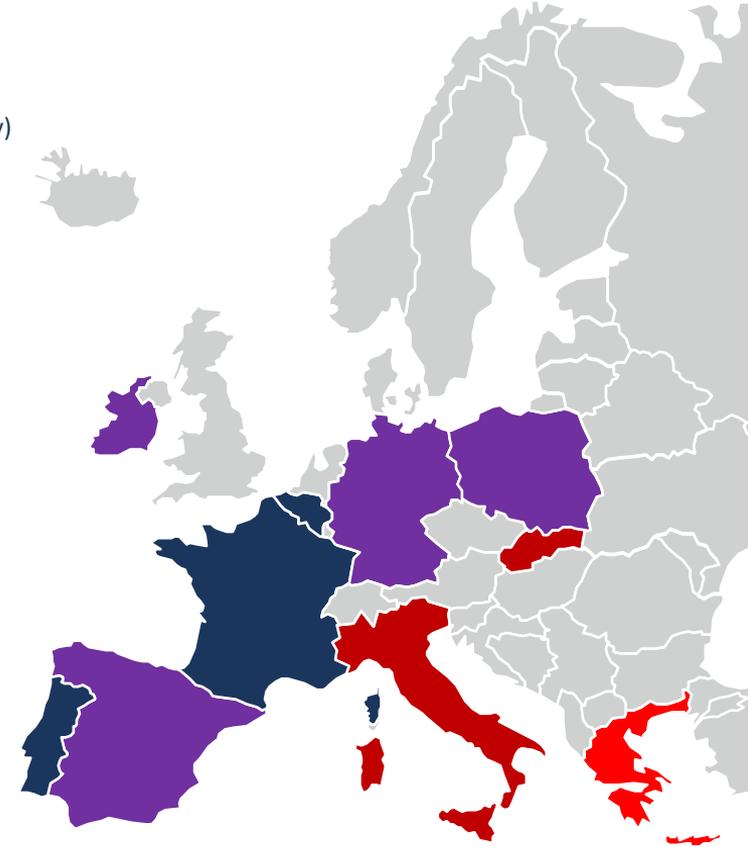
Rail-based public transport **48 mn**

Road-based public transport **52 mn**

# Very significant disparities in terms of duration of travel within the EU: on one side the French, on the other the Greeks

Time spent on average: **9h35** (from Monday to Friday)  
**1h55** on average per day

	TOTAL	Including motorized vehicles	Including public transport	Including active modes
BELGIUM	7h58	3h12	1h36	3h09
FRANCE	7h12	3h29	1h08	2h34
GERMANY	9h23	3h33	1h28	4h23
GREECE	13h02	5h43	2h34	4h45
IRELAND	9h48	4h50	1h19	3h39
ITALY	10h40	4h45	1h34	4h21
POLAND	9h53	3h43	1h41	4h29
PORTUGAL	8h11	3h57	1h24	2h51
SLOVAKIA	10h08	3h18	2h11	4h39
SPAIN	9h35	3h11	1h45	4h41



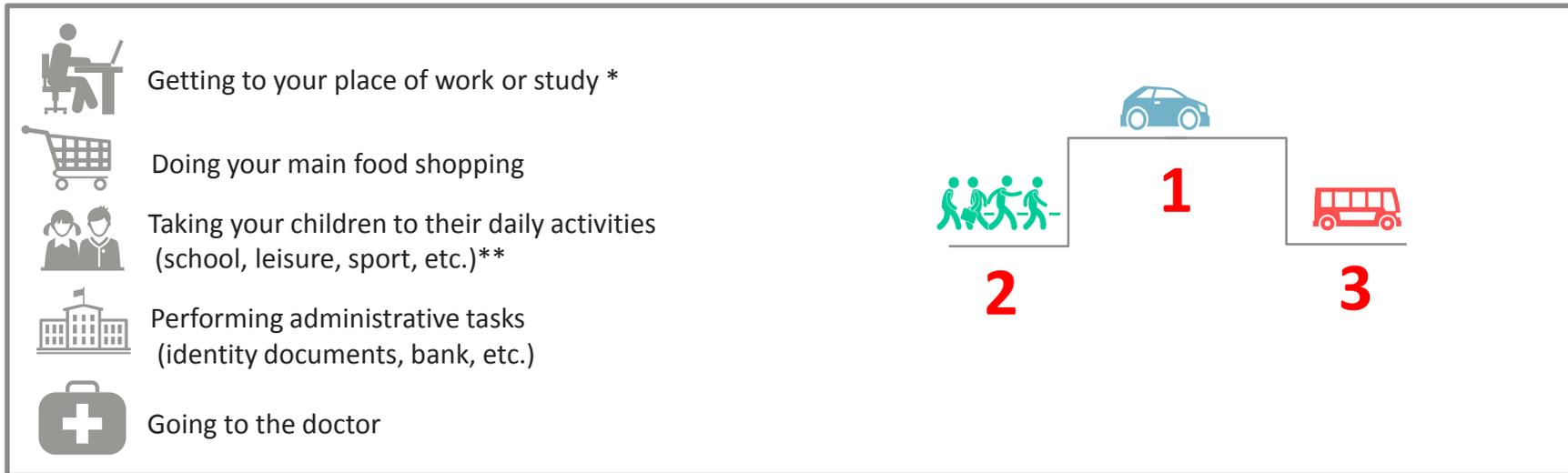
Shortest time To the longest

On average, how much time do you spend in a normal week using each of the following methods of transport (from Monday to Friday)?

**Base : Total**



# The car : an essential mode of transport for day-to-day journeys...



## The car is even more essential for those who live in rural areas and on the outskirts of cities

To get to their place of work / study...

70% are using it in rural areas



67% on the outskirts of cities



54% in town



What methods of transport do you usually use for the following purposes? *Total exceeds 100 because several answers are possible*

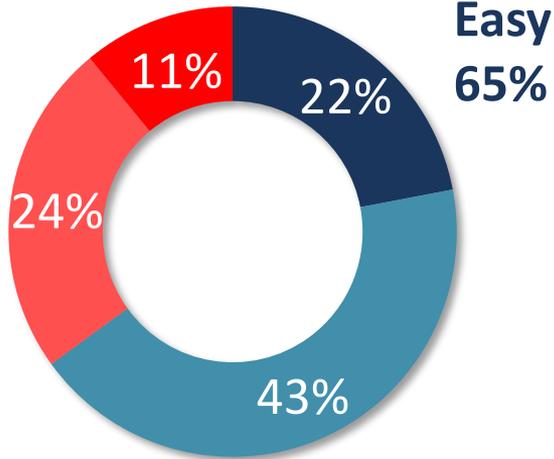
\*base People in a job and Students

\*\*base parents

# Especially because for more than a third of Europeans, it is difficult to use public transport, particularly in rural areas

Base : Total

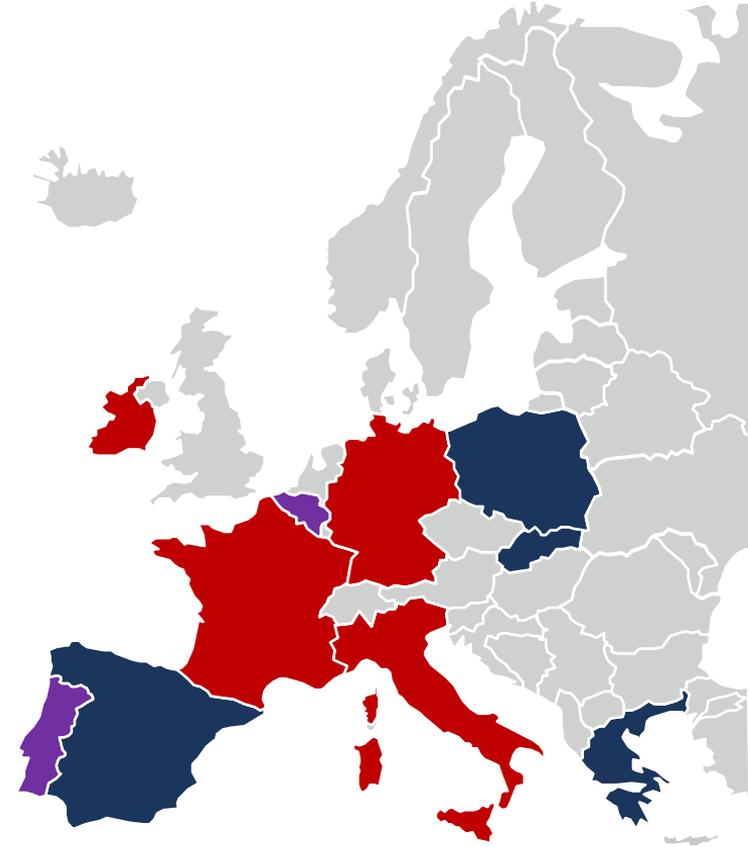
- Very easy
- Quite easy
- Quite hard
- Very hard



## BREAKDOWN BY COUNTRY

### S/t Hard %

BELGIUM	37
FRANCE	43
GERMANY	44
GREECE	30
IRELAND	44
ITALY	43
POLAND	29
PORTUGAL	38
SLOVAKIA	21
SPAIN	23



**Hard 35%**

- 56% of people living in rural areas
- 53% of people working or studying in rural areas



# MOBILITY IS CLOSELY CONNECTED TO SOCIAL INCLUSION

# Europeans' feeling of social inclusion is strongly correlated with the quality of transport supply

Base : Total

**Where I live, I feel a bit too far away from everything**

(shops, cinemas, schools, government services, my workplace, etc.)

**26%**

**A feeling tied to the difficulty to move:**

- 42% of those who find it difficult to use public transport close to their home
- 48% of those who face difficulties to get to their place of work or study
- 50% of those who have difficulties to go to the doctor



**42% of these Europeans feeling 'far from everything' consider that where they live, public authorities are doing less than elsewhere for the well-being of the people**

Base : People in a job



**If I found myself unemployed, I'd definitely have to move to find a similar job**

**36%**

**A feeling conditioned by the access to transport rather than by the place of residence:**

- 37% of people living in rural areas but...
- 47% of those who have the feeling of being a bit far from everything
- 44% of those who find it difficult to use public transport close to their home
- 44% of people dissatisfied with the infrastructures which allow them to move in town
- 45% of people dissatisfied with infrastructures which allow them to reach the main roads

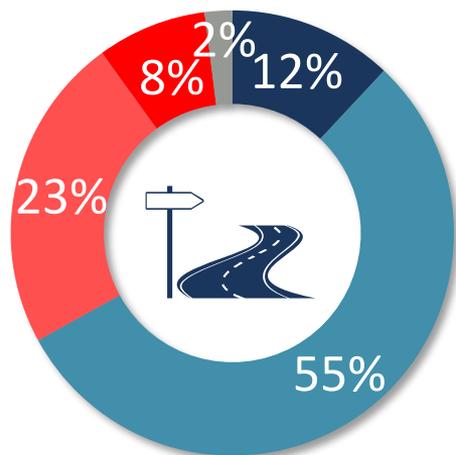


**VERY HIGH EXPECTATIONS REGARDING  
THE IMPROVEMENT OF TRANSPORT  
CONDITIONS:  
MORE INTERMODAL SOLUTIONS FOR  
GREATER MOBILITY**

# Europeans are on the whole satisfied with the road network

Base : Total

- Very satisfied
- Quite satisfied
- Not very satisfied
- Not at all satisfied
- We don't have these facilities where I live



**Satisfied**  
**67%**

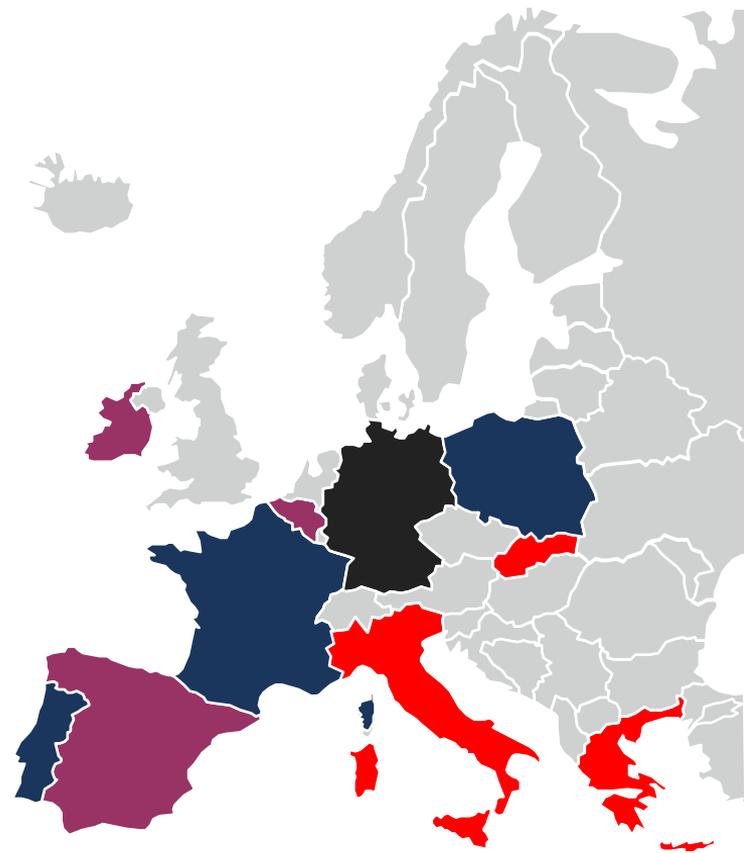
## BREAKDOWN BY COUNTRY S/t Satisfied %

BELGIUM	67
FRANCE	74
GERMANY	81
GREECE	50
IRELAND	69
ITALY	53
POLAND	73
PORTUGAL	73
SLOVAKIA	56
SPAIN	69

**Not satisfied**  
**31%**

More specifically, are you satisfied or dissatisfied with each of the following types of transport infrastructure where you live?

– Road network (excluding motorways)

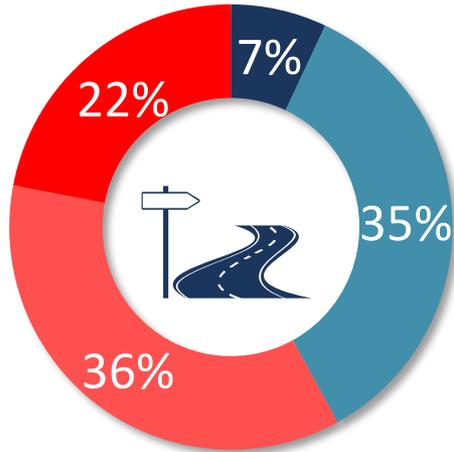


From the most satisfied To the least satisfied

# But dissatisfaction with the fluidity of traffic during the rush hour is particularly strong

Base : Total

- Very satisfied
- Quite satisfied
- Not very satisfied
- Not at all satisfied



**Satisfied**  
42%

## BREAKDOWN BY COUNTRY

S/t Not satisfied %

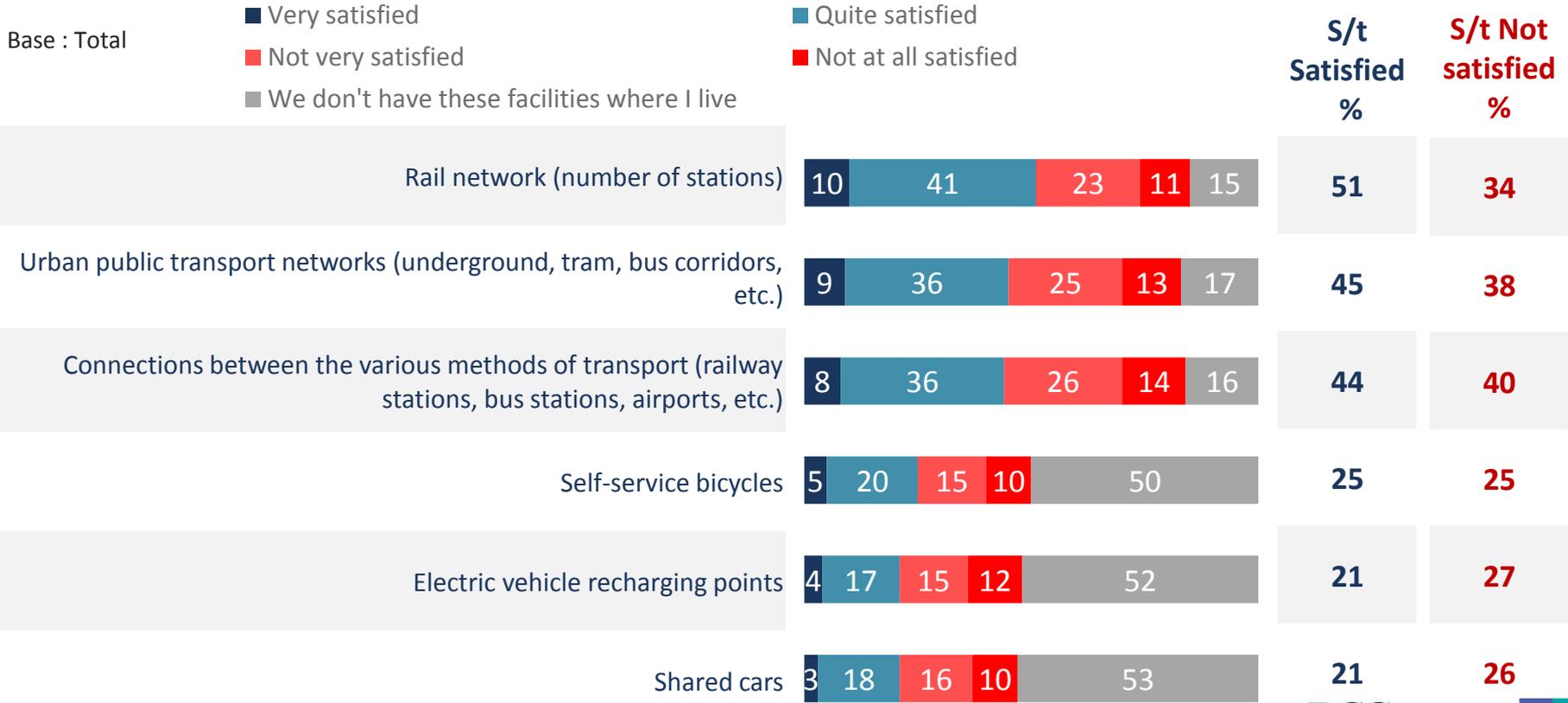
BELGIUM	68
FRANCE	58
GERMANY	57
GREECE	68
IRELAND	56
ITALY	62
POLAND	55
PORTUGAL	45
SLOVAKIA	62
SPAIN	51

**Not satisfied**  
58%



From the most satisfied To the least satisfied

# Dealing with these problems of traffic flow, Europeans express real criticisms, especially on intermodality and urban public transport



More specifically, are you satisfied or dissatisfied with each of the following types of transport infrastructure where you live?





**EUROPEANS ARE EAGER FOR  
INVESTMENT:  
MORE INFRASTRUCTURES AND  
DIGITAL SERVICES TO FAVOUR  
INTERMODALITY AND IMPROVE  
MOBILITY**

# The majority of Europeans think that public authorities do not invest enough in transport infrastructure

Base : Total

■ Yes, definitely      ■ Yes, probably  
■ No, probably not      ■ Not, definitely not

**S/t**  
**Yes**  
**%**

**S/t**  
**No**  
**%**

Motorway network



**52**      **48**

Road network (excluding motorways)



**44**      **56**

Urban public transport network (...)



**40**      **60**

Connections between the various methods of transport (...)



**39**      **61**

Rail network



**38**      **62**

Electric vehicle recharging points



**26**      **74**

# Italians, Greeks and Slovaks particularly think that investments are lacking

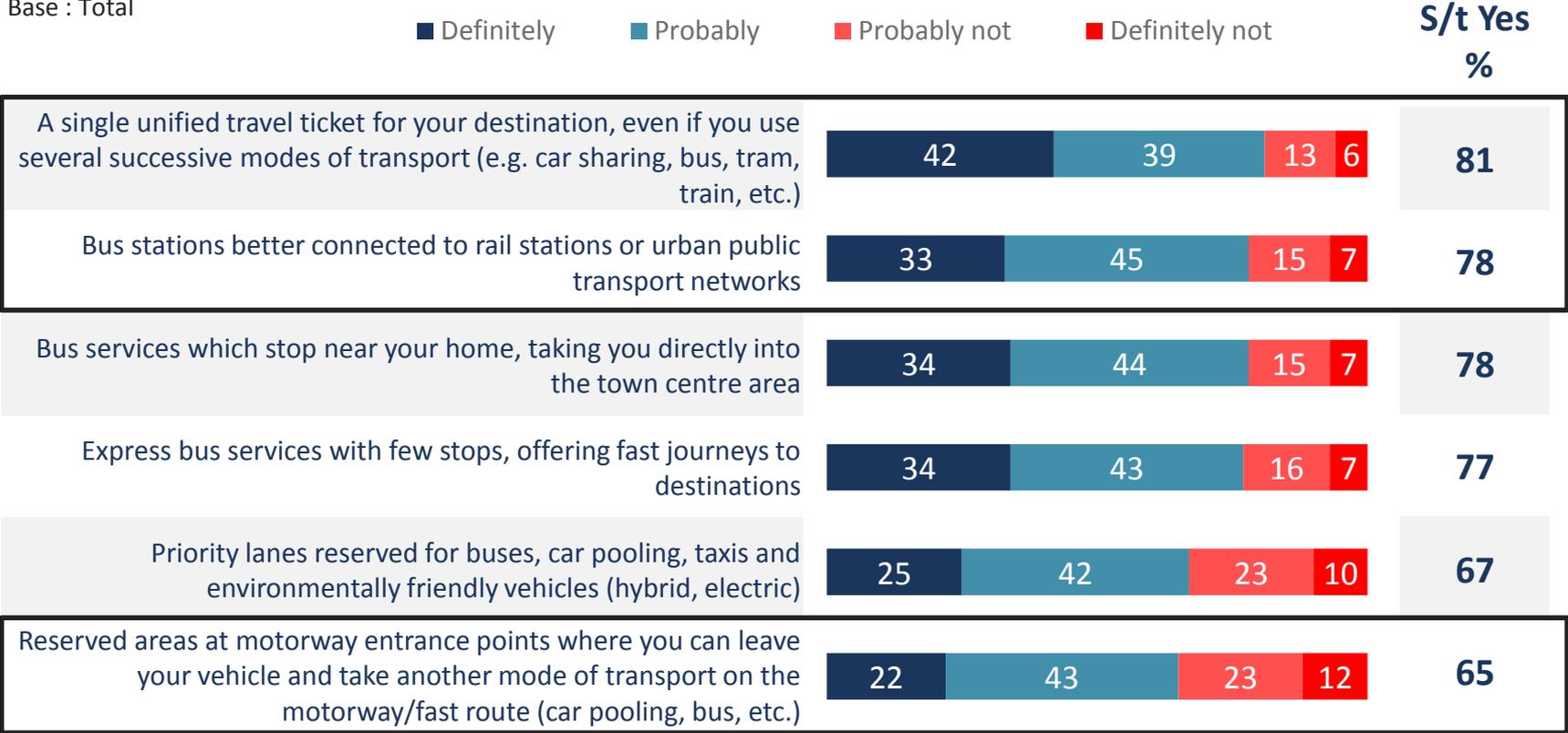
Base : Total

		BREAKDOWN BY COUNTRY										
Yes %		TOTAL	BELG	FR	GER	GRE	IRE	ITA	POL	PORT	SLOV	SPAIN
	Motorway network	52	54	66	62	43	63	40	49	59	30	50
	Road network (excluding motorways)	44	50	57	56	29	45	30	59	44	30	45
	Urban public transport network (underground, tram, bus corridors, etc.)	40	46	55	47	32	35	28	50	34	29	45
	Connections between the various methods of transport (railway stations, bus stations, airports, etc.)	39	44	48	48	30	38	28	46	34	28	41
	Rail network	38	44	46	47	26	41	27	45	30	34	39
	Electric vehicle recharging points	26	30	38	32	13	36	23	25	23	12	26



# Top 6 of tested improvements: above all improve the possibilities to combine several modes of transports

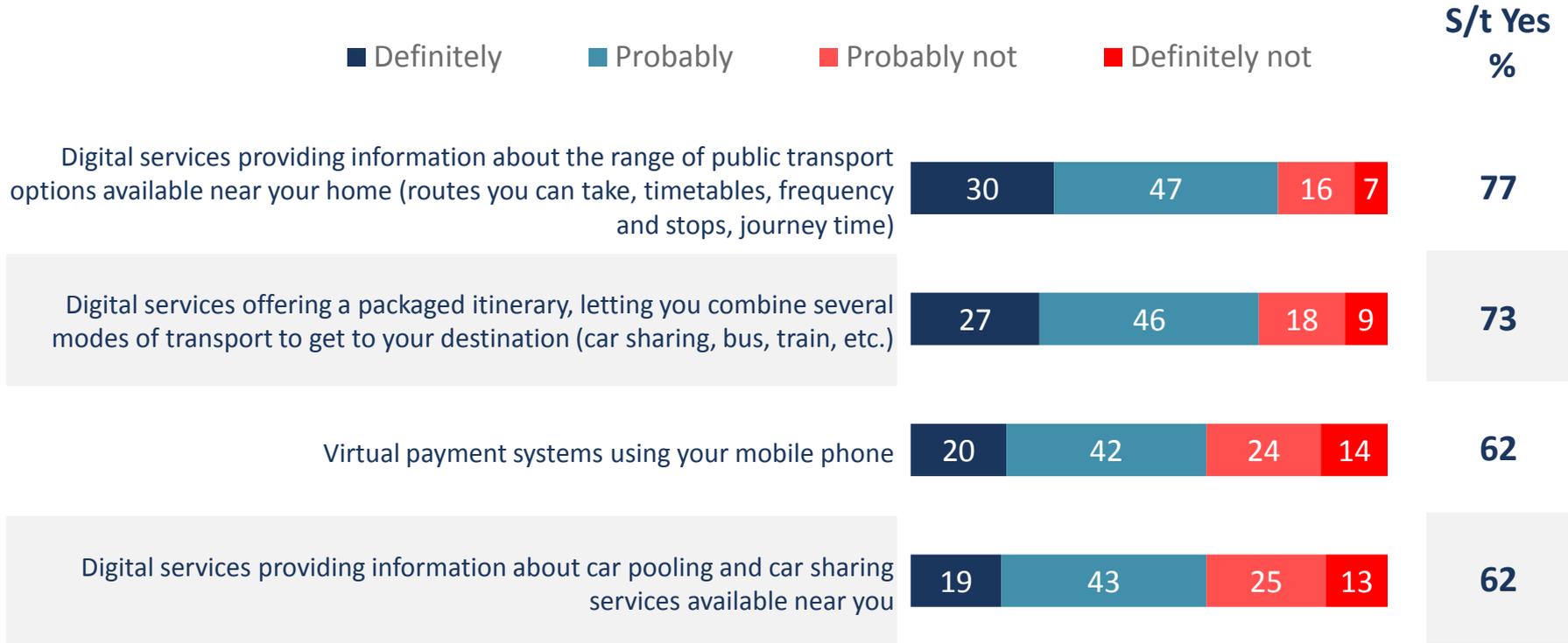
Base : Total



Do you think the following initiatives would make travelling easier for you in your daily life?

# The development of digital services is also considered to be a priority to facilitate travel

Base : Total



# Most Europeans are prepared to change their habits as long as investments are made

Base : Total

- Completely ready
- Fairly ready
- Not very ready
- Not ready at all
- It doesn't affect me

**S/T READY**



If the investments you rate as critically important were made, would you be ready to do the following?

# Some Europeans however find it difficult to leave their car behind, especially in Germany

Base : Total

Ready %	BREAKDOWN BY COUNTRY										
	TOTAL	BELG	FR	GER	GRE	IRE	ITA	POL	PORT	SLOV	SPAIN
Use public transport more often	72	61	65	57	89	70	75	72	82	72	79
Use your car less often	66	55	60	50	85	60	73	62	77	67	69
Car pool/car share more often	44	33	40	27	62	35	45	55	44	51	44

If the investments you rate as critically important were made, would you be ready to do the following?

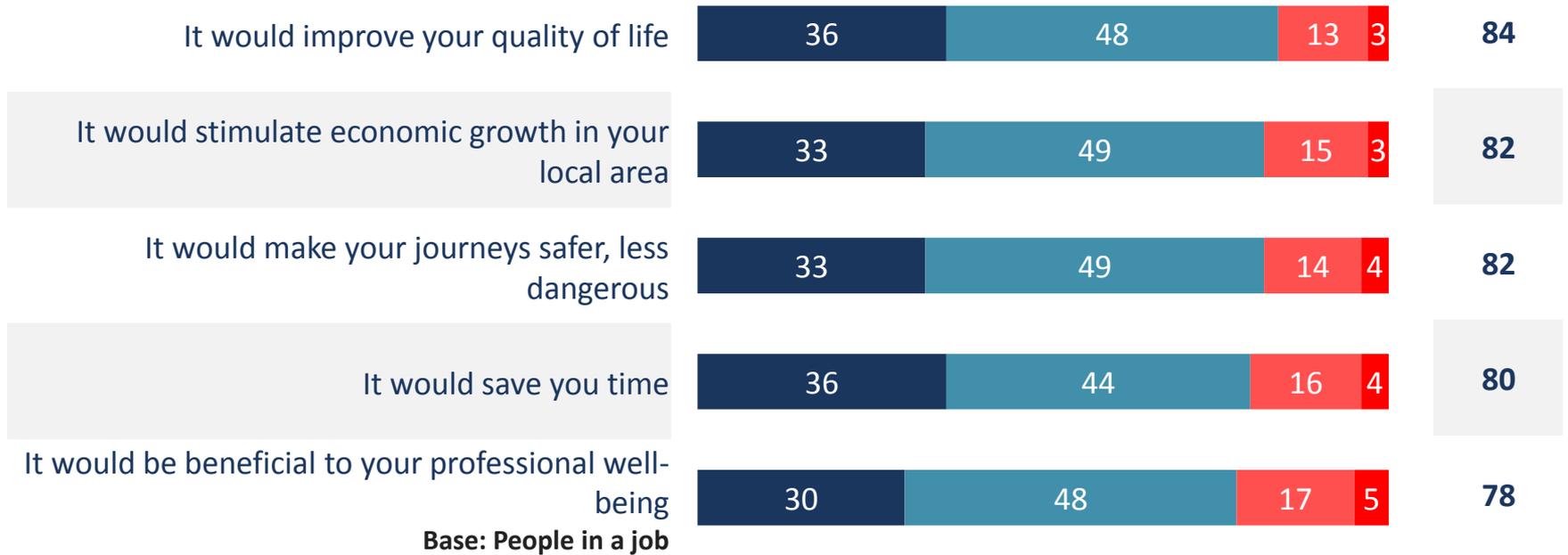


# Making the necessary investments would improve the quality of life

Base : Total

■ Yes, definitely  
 ■ Yes, probably  
 ■ No, probably not  
 ■ No, definitely not

S/t  
Yes  
%

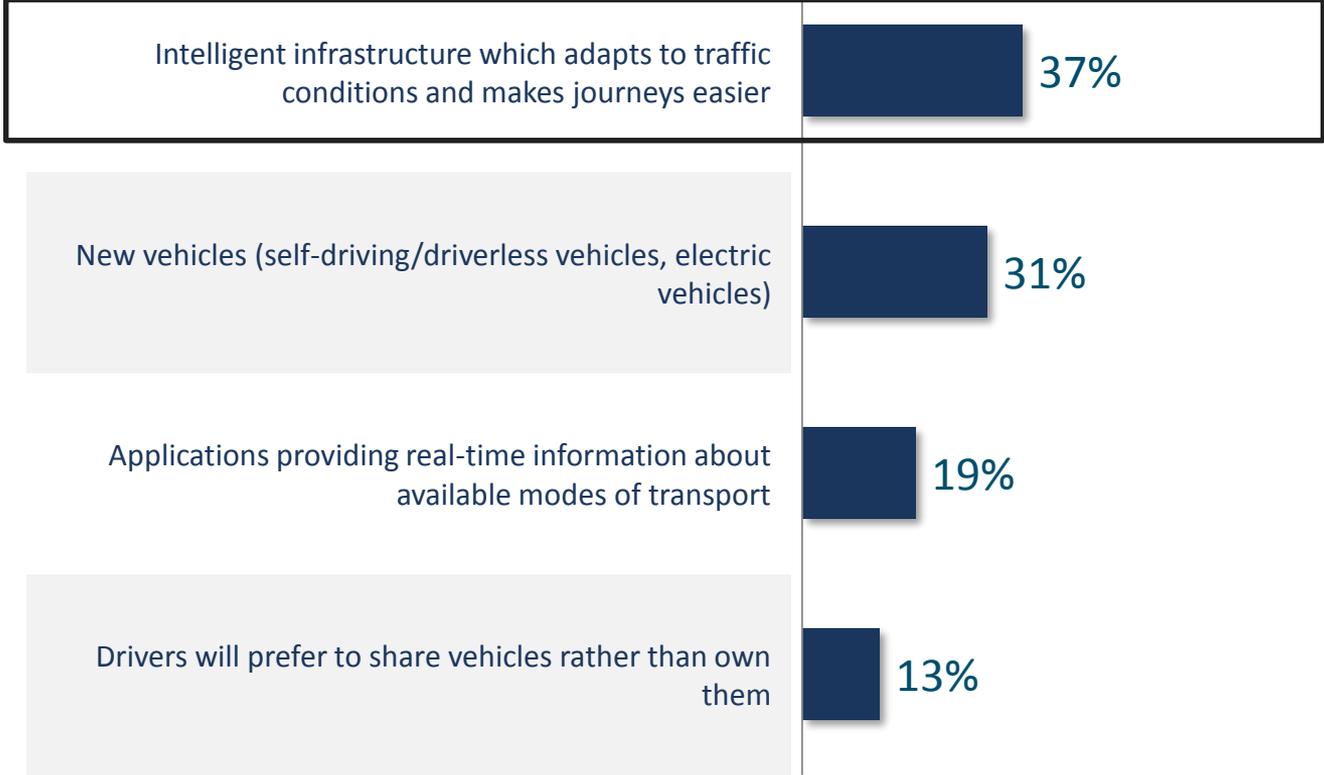




# MOBILITY AT THE DAWN OF A REVOLUTION THAT GIVES RISE TO GREAT HOPE

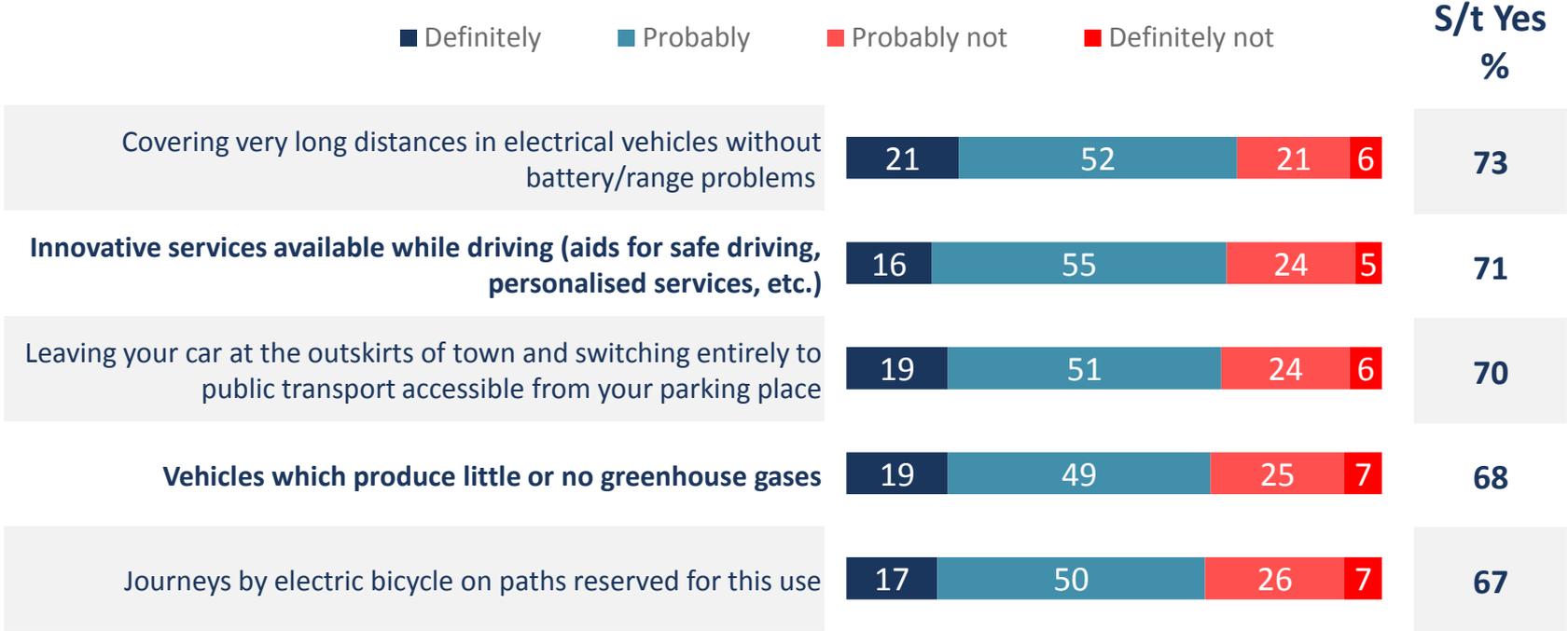
# According to Europeans, intelligent infrastructure will bring the biggest change in the field of mobility

Base : Total



# Europeans are convinced that innovations made to vehicles and new technologies are going to completely change the way they travel

Base : Total

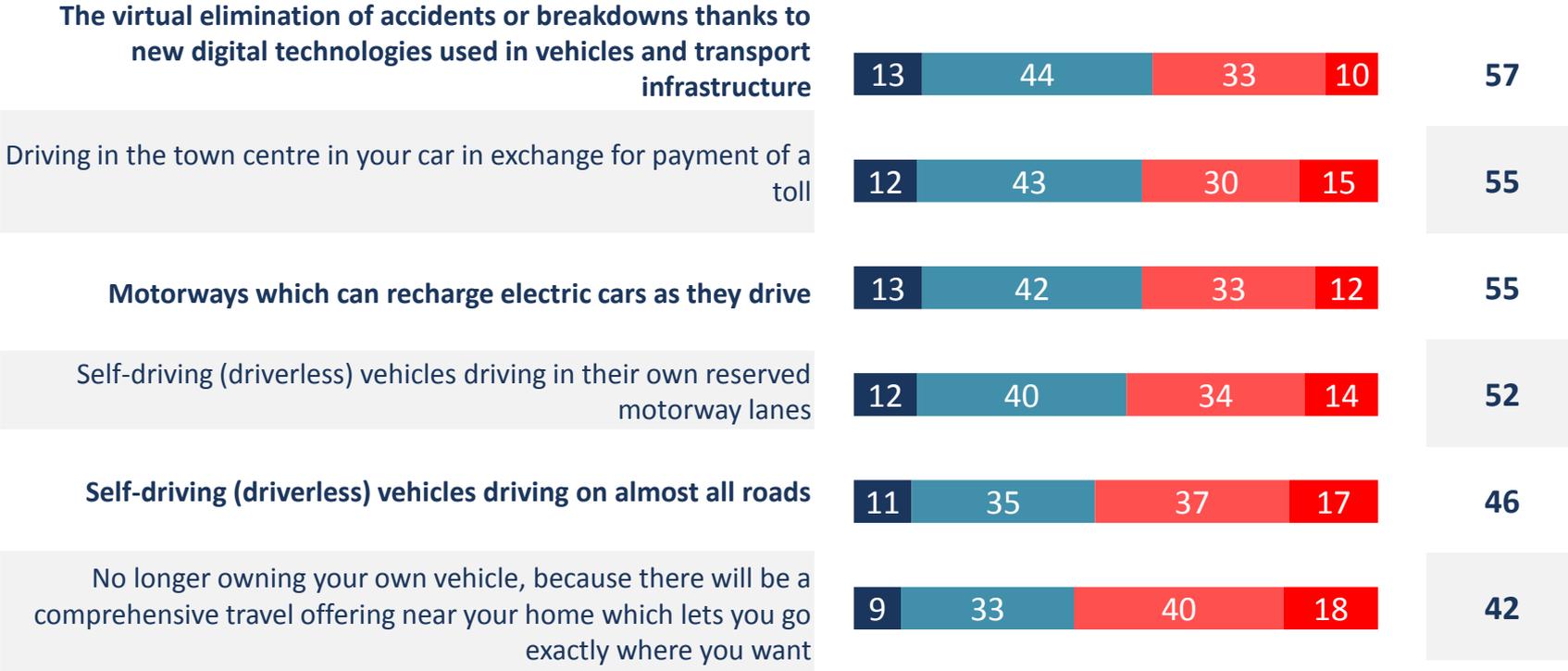


# Europeans think they will no longer experience breakdowns or accidents and will ride in autonomous vehicles

Base : Total

■ Definitely
 ■ Probably
 ■ Probably not
 ■ Definitely not

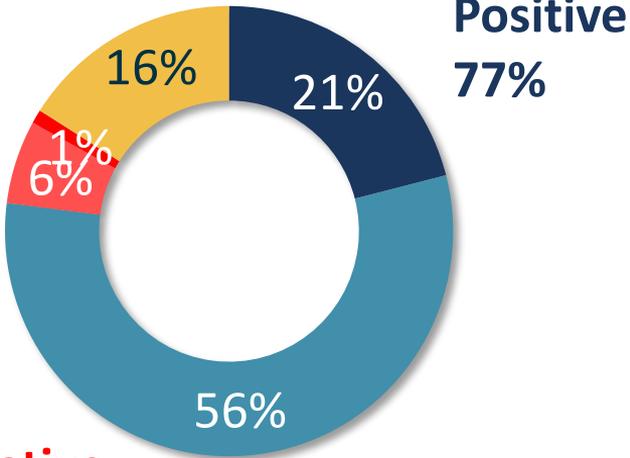
S/t Yes %



# Two-thirds of Europeans think these innovations will have a positive impact on their everyday life

Base : Total

- Very positive
- Mostly positive
- Mostly negative
- Very negative
- Neutral



BREAKDOWN BY COUNTRY	
S/t	Positive %
BELGIUM	68
FRANCE	72
GERMANY	60
GREECE	90
IRELAND	77
ITALY	81
POLAND	80
PORTUGAL	88
SLOVAKIA	74
SPAIN	83

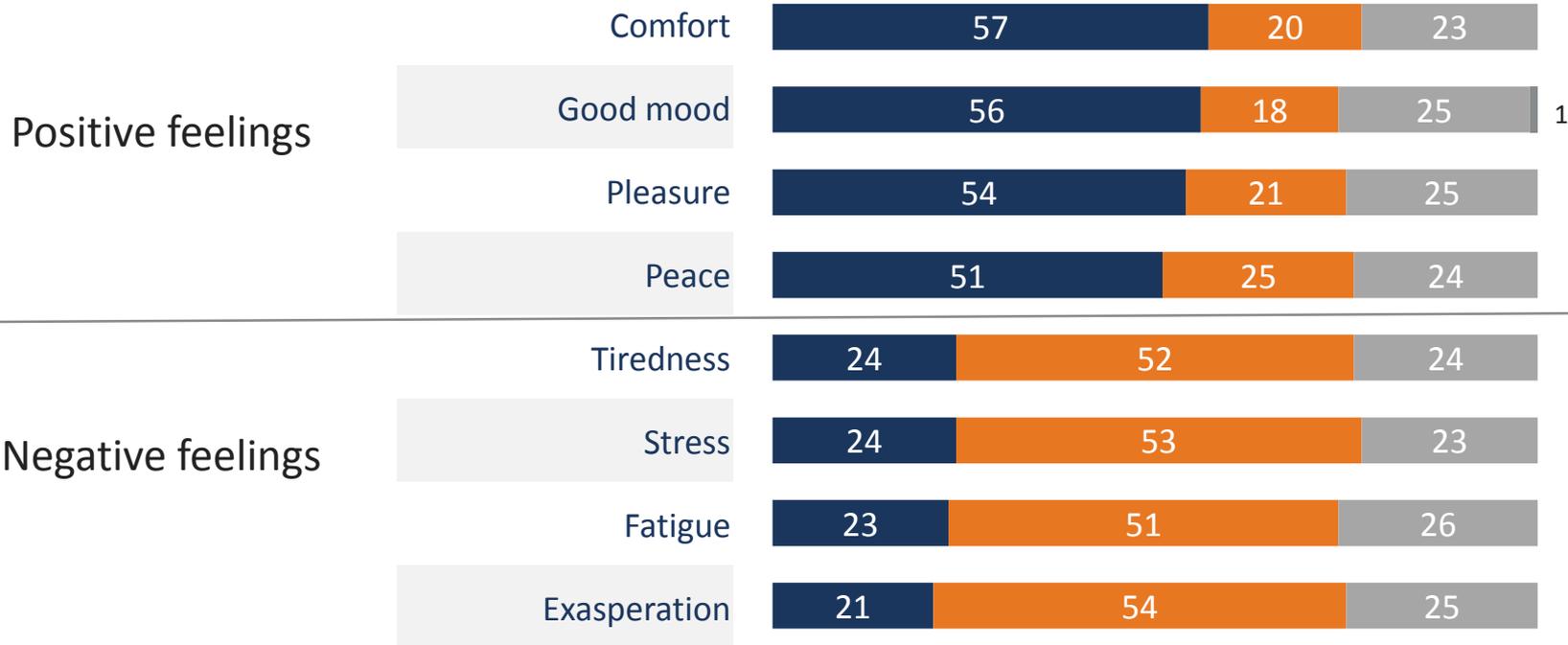


And do you think these innovations in the field of transport and mobility would have positive, negative or neutral consequences on your everyday life?

# In 15 years' time, people's state of mind during a normal day's travelling will be changed: more comfort and fun and less tiredness and stress

Base : Total

■ More often    
 ■ Less often    
 ■ The same amount as today    
 ■ Don't know



And in 15 years' time, do you think you'll experience the following feelings more often, less often or the same amount during a normal day's travelling?