



for

getaround

Mobility in European metropolitan areas

How do Europeans perceive and use transportation?

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Summary

Survey methodology

P.3

Summary of the results

P.5

Opinion on car-related issues in cities

P.9

Opinion on car sharing

P.23



Survey methodology



Study carried out **online** from **21st** to **30th August 2019**.



Sample of **4,009** Europeans, comprising 8 representative samples of the following cities:

- **City of Paris: 500**
- **Grand Lyon: 500**
- **Inner London: 500**
- **Land Berlin: 501**
- **Land Hamburg: 500**
- **Capital Region of Brussels: 505**
- **Metropolitan Area of Madrid: 503**
- **Metropolitan Area of Barcelona: 500**



Quotas and adjustment applied to each of the following variables in each local sample: **interviewee's gender, age, socio-professional category and neighbourhood**



Reading aid for the detailed results:

- The figures shown are expressed as percentages.
- Results are also shown for the most central neighbourhoods in each city: **Getaround areas of interest**. In Paris and London, the Getaround area of interest is the same as the whole city (City of Paris, Inner London).

Confidence interval

The confidence interval (sometimes called “margin of error”) determines the trust which can be placed on a particular value, taking into account the value observed and the sample size. If the calculation of the confidence interval concerns randomised surveys, it is generally acknowledged that the figure would be close to that obtained from surveys carried out with a quota method.

Sample size	5% or 95%	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
100 interviews	4.4	6.0	8.0	9.2	9.8	10
200 interviews	3.1	4.3	5.7	6.5	6.9	7.1
300 interviews	2.5	3.5	4.6	5.3	5.7	5.8
400 interviews	2.2	3.0	4.0	4.6	4.9	5.0
500 interviews	2.0	2.7	3.6	4.1	4.4	4.5
600 interviews	1.8	2.4	3.3	3.8	4.0	4.1
800 interviews	1.5	2.1	2.8	3.2	3.4	3.5
1,000 interviews	1.4	1.8	2.5	2.9	3.0	3.1
2,000 interviews	1.0	1.3	1.8	2.1	2.2	2.3
3,000 interviews	0.8	1.1	1.5	1.7	1.8	1.8
4,000 interviews	0.7	0.9	1.3	1.5	1.6	1.6
6,000 interviews	0.6	0.8	1.1	1.3	1.4	1.4

Reading note: In a sample of 500 people, if the percentage obtained is 10%, the margin of error is equal to 2.7. There is therefore a 95% chance that the actual percentage is between 7.3% and 12.7% (plus or minus 2.7 points).

Summary of the results



Summary of the results: main lessons from this survey (1/3)

- In all 8 cities from this survey, **driving a car may not be the most frequent mean of transportation today, but car remains useful to a majority of residents:** in central neighbourhoods, less than 25% of population drive their car every day, yet cars are still deemed necessary by a majority for occasional reasons (mostly to go on weekend trips or on holiday, but also occasionally to run errands or for leisure activities).
- However, in every city (or at least in the most central neighbourhoods), a majority of residents agree that **a car is not the best way to get around in their city.** If there were more efficient alternative travel services for them to use, **almost all residents would consider using their car less;** and 25% to 50% would even consider getting rid of their car for good. The most convincing changes would be **to improve public transport, but also to provide access to shared cars in their areas, whenever necessary.**
- Furthermore, almost all inhabitants in every city are **disturbed by issues related to car congestion:** traffic jams, air pollution, parked cars taking up too much space on the streets and noise pollution from vehicles. They are **poorly satisfied with the measures being taken to reduce issues related to car congestion:** the level of satisfaction barely reaches 5/10 in London, Paris, Lyon, Barcelona and Madrid; it is even lower in Berlin, Hamburg, and Brussels. Which brings more than 75% of them to believe that **their quality of life would improve if there were fewer cars.**
- Therefore, it is no surprise that car sharing is viewed favorably: more than two thirds of the population currently have an **overall positive opinion of car sharing,** and around 7 inhabitants out of 10 believe that car sharing **could help improve travel** in their city. In most cities, more than two thirds of the population **would like to have more car sharing services in their own neighbourhood, and think their local councilor should support the development of car sharing in their area.** And if reducing the number of cars meant having more space available, the inhabitants would like to see this extra space used for **multiple purposes:** above all creating green areas, but also increasing pedestrian only areas, space for local community activities, etc.

Summary of the results: which cities stand out? (2/3)

- **Londoners and Parisians lead the way when it comes to car sharing:** overall, cars are deemed less useful/necessary by Parisians and by Londoners. In all cities, over 75% of residents would consider using their car less if there were more efficient alternative travel services for you to use... but only in London and in Paris do we find 43-50% people who claim they would be ready to get rid of their car.
- Interestingly, the fact that London and Paris are more open to car sharing **cannot be solely attributed...**
 - **Neither to the amount of driving today.** Driving a car in general is even less frequent in Lyon or Berlin. Driving a car to go on holiday is also far less frequent in German cities, while it is less frequent for the weekly shop/household errands in Spanish cities.
 - **Nor to the nuisances associated with cars.** In fact, all across our European cities, residents always agree that car congestion creates a lot of problems in their cities.
- London and Paris also are the cities in which **car sharing services would convince the most people to get rid of their car** – alongside Madrid. In other cities, car sharing services are not as significant an argument: it can weigh less than having one's own bicycle/motorcycle, for instance.
- It may be that **Londoners and Parisians have already been influenced to the policies implemented in their cities:** the French and British capitals have already taken measures to reduce the number of cars in the heart of the metropolis.
- Satisfaction with the public authorities is not very good overall, but it is particularly low in German cities and in Brussels. It is also in those cities that the image of car sharing is less positive. It seems there could be **a link between the perception of car sharing and the satisfaction with the public authorities in this regard.**

Summary of the results: which categories stand out? (3/3)

- The views on cars and car sharing are **rather homogeneous**: what follows focuses deliberately on the differences between, categories.
- **Men believe slightly more than women in the necessity of cars**, in every aspect. Not only that, but men are also less enthusiastic than women when it comes to the benefits and perspectives of car sharing.
- People aged 25-39, who are more likely to take care of **children** today, express complex views when it come to cars:

At first, they are **more likely to feel that cars are necessary**, and are the best way to get around in their cities.

However, residents aged under 40 are also **amongst the readiest to use their car less, or even to get rid of it**, if only there were more efficient alternative travel services for them to use.

Furthermore, **they believe more strongly that their own quality of life would improve** if there were fewer cars, they have an overall better opinion of car sharing.

If extra space was freed, they focus their expectations on **local community activities**.

On average, they are **more satisfied than their elders with the measures being taken** in their cities, although it should be noted that seniors are often more critical of public policies.

Opinion on car-related issues in cities

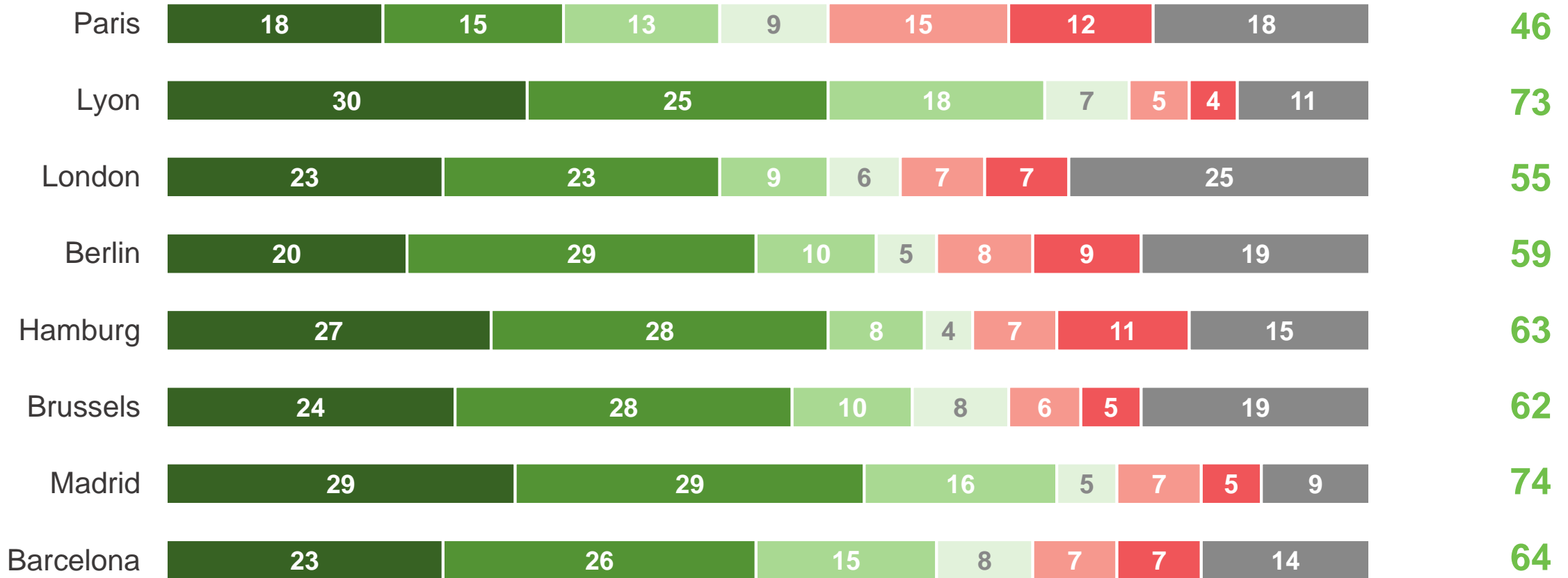


Less than a third of the inhabitants drive a car every day; however, in all cities except Paris, a majority of people drive at least once a week

On average, how often do you drive a car?

- To all, in % -

At least once a week

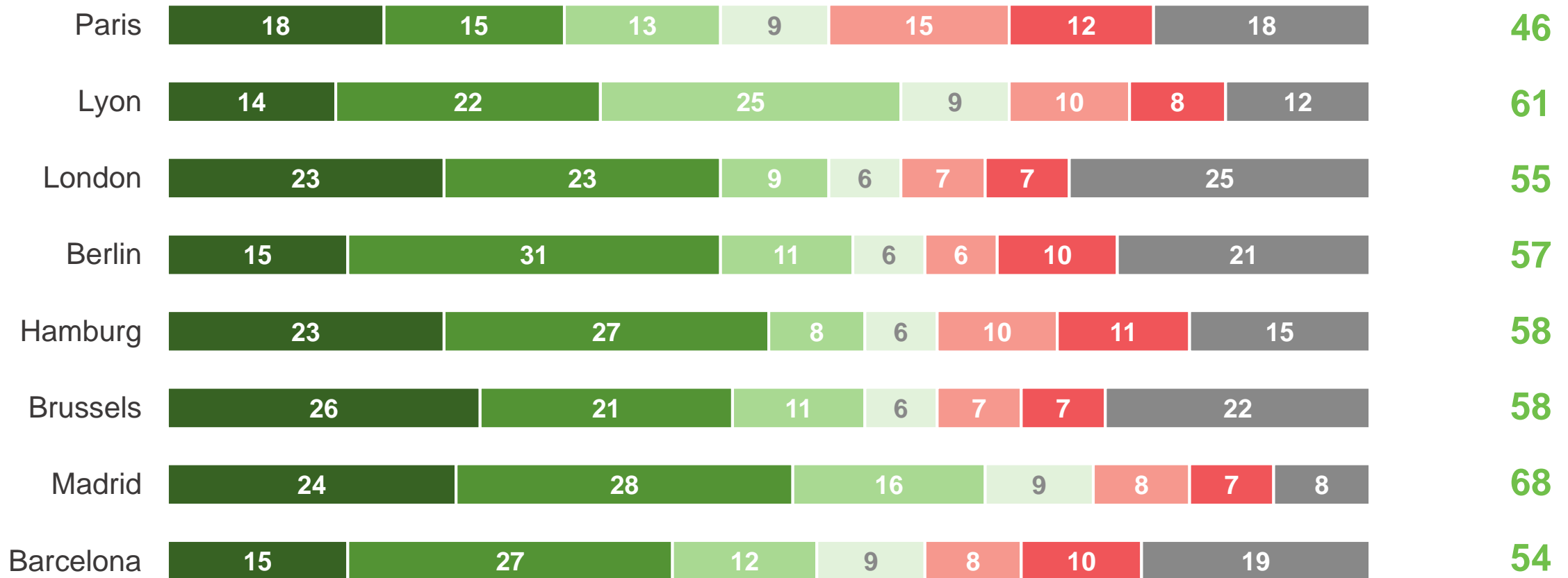


In the most central neighbourhoods, less than a quarter of the population drive a car every day, yet a majority still drive at least once a week

On average, how often do you drive a car?

- In all « **Getaround areas of interest** », in % -

At least once a week



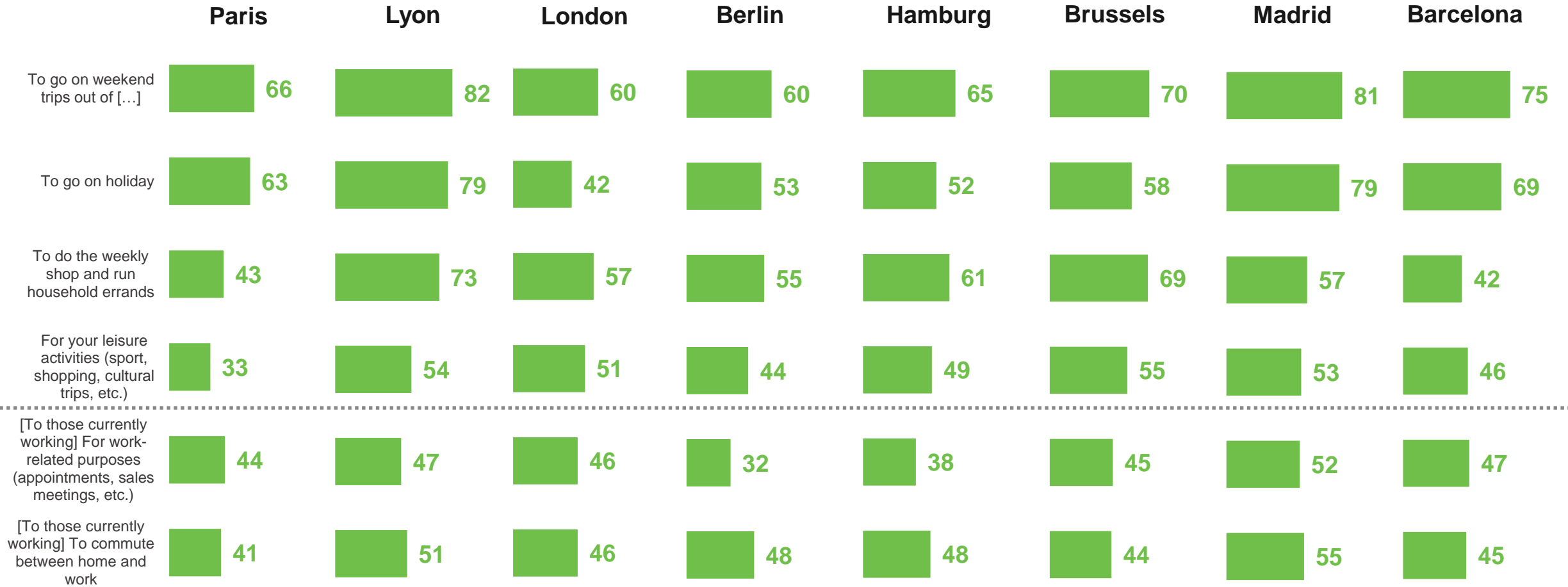
- Every day, or almost every day
- Roughly once a week
- Less often
- I don't have a driving licence

- Several times a week
- Around 1 - 3 times a month
- Never (but I have a driving licence)

In most cities, the top 3 reasons for using a car are: going on weekend trips, going on holiday (although not that much in London), and running household errands

In your opinion, how necessary is it to use a car...?

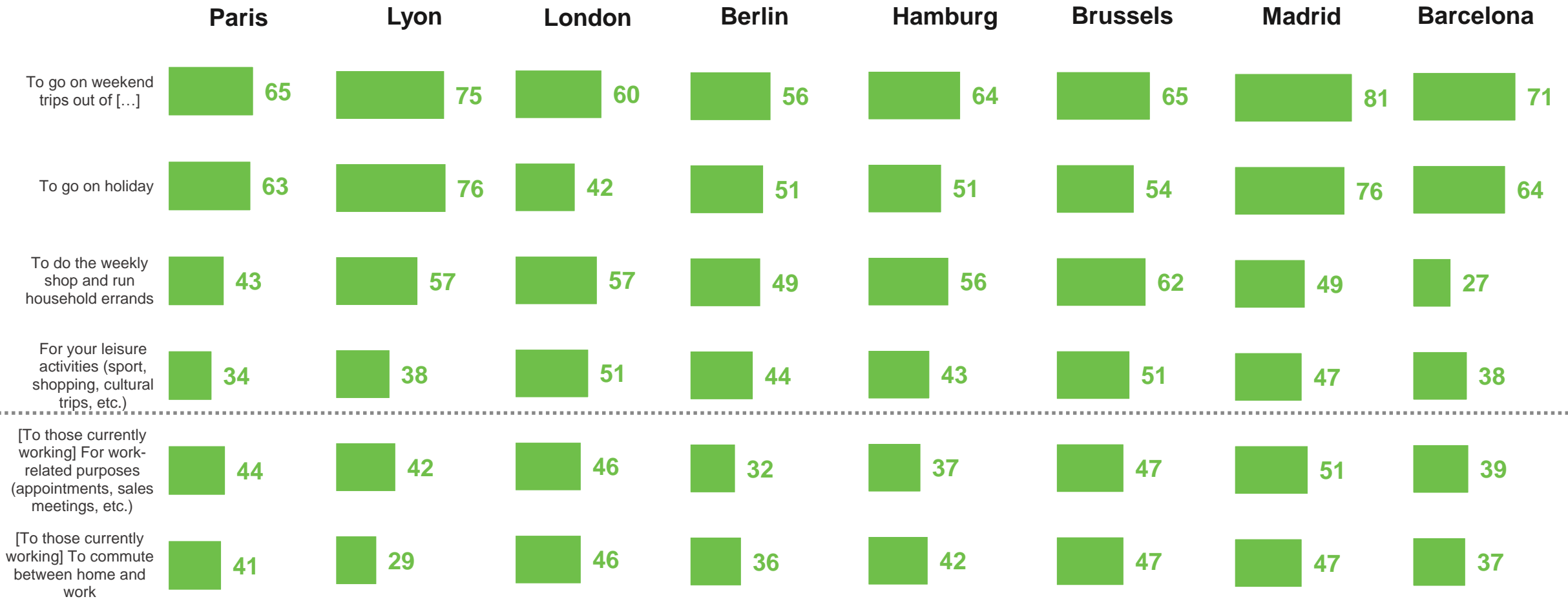
- To all, in % of « Necessary » -



In the most central neighbourhoods (particularly in Spanish cities), the use of a car to do the weekly shop and to run household errands is significantly less important than weekend trips or going on holiday

In your opinion, how necessary is it to use a car...?

- In all « **Getaround areas of interest** », in % of « **Necessary** » -



In most cities, only a minority of inhabitants believe that a car is currently the best way for them to get around in their city, although the residents from Berlin and Hamburg are more prone to believe so

In your opinion, is a car currently the best way for you to get around in your city?

- To all, in % of « Yes » -

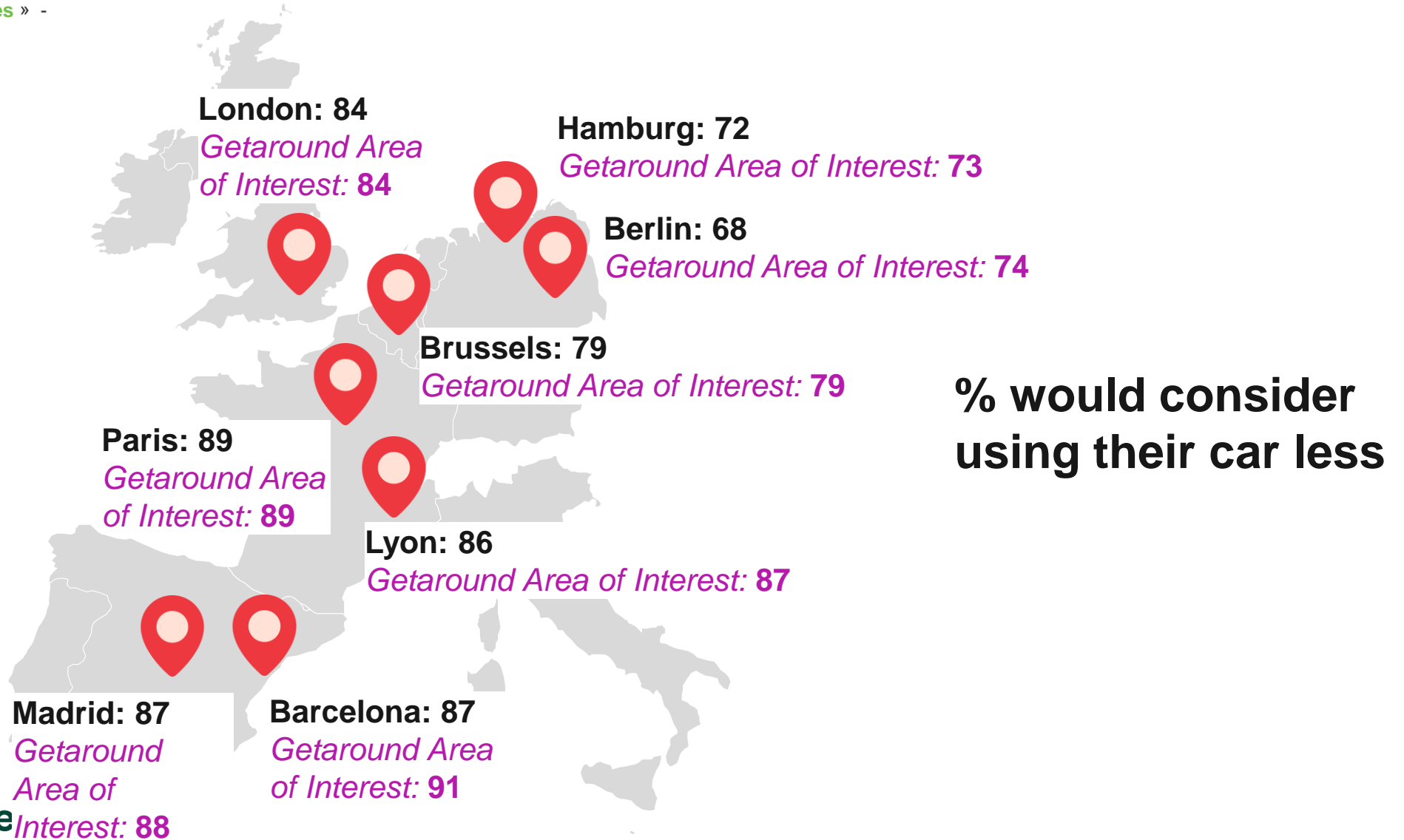


% thinking a car is currently the best way to get around in their city

In all European cities, a vast majority of residents currently owning a car say they would consider using their car less, if only there were more efficient alternative travel services for them to use

In the future, if there were more efficient alternative travel services for you to use in [...] (a more extensive public transport network of a higher quality, scooter/motorbike sharing services, car clubs/car sharing etc.) would you consider...?

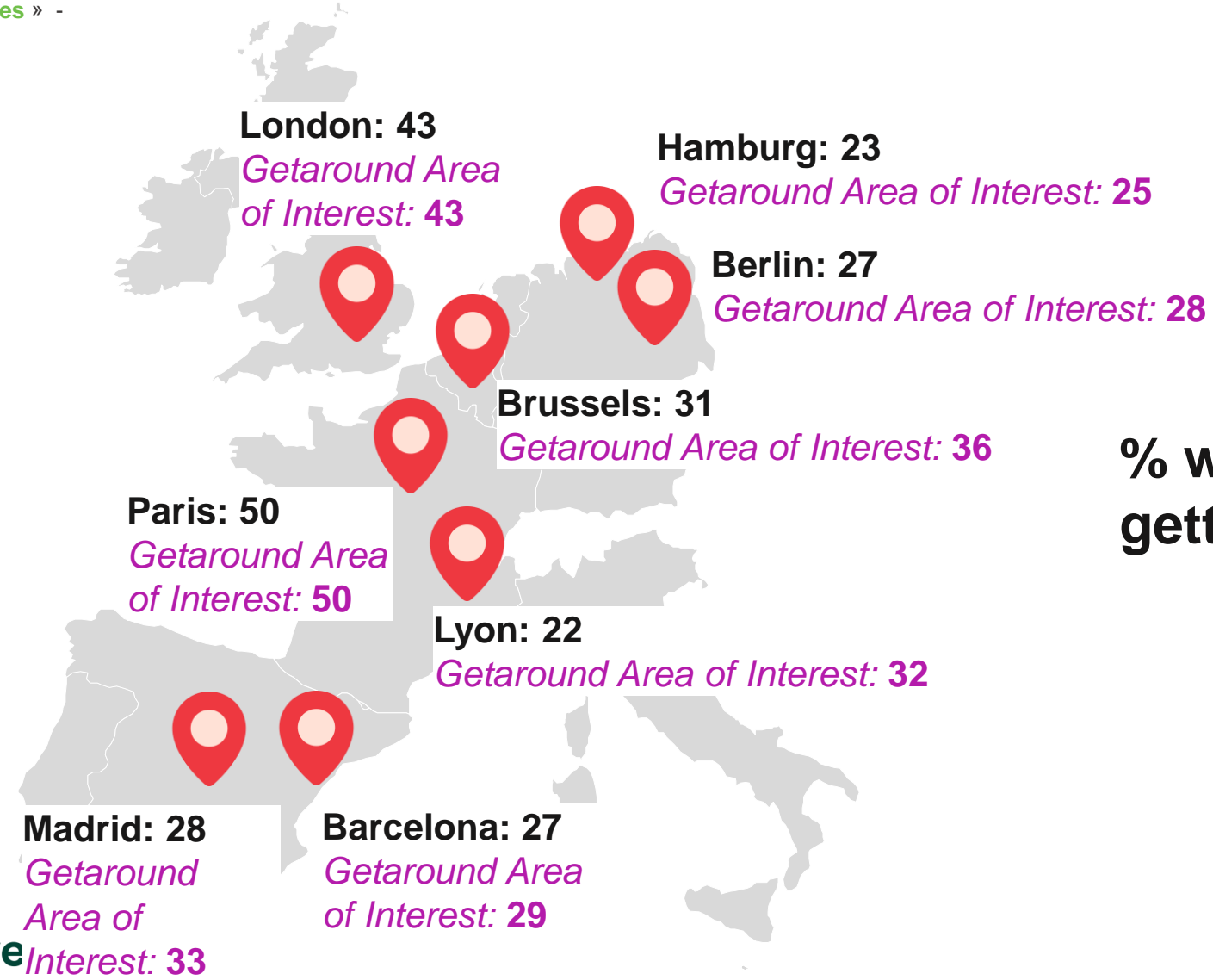
- To those who own a car, in % of « Yes » -



In Paris and London, almost half of those owning a car even state they would consider getting rid of their car, if there were more efficient alternative travel services for them to use

In the future, if there were more efficient alternative travel services for you to use in [...] (a more extensive public transport network of a higher quality, scooter/motorbike sharing services, car clubs/car sharing etc.) would you consider...?

- To those who own a car, in % of « Yes » -



% would consider getting rid of their car

In all cities, the best ways to convince car owners to get rid of their vehicle would be to improve public transport in their area, and to provide access to shared cars in their area when needed

Which of the following would most likely convince you to get rid of your car? (Please do not select more than 2 answers)

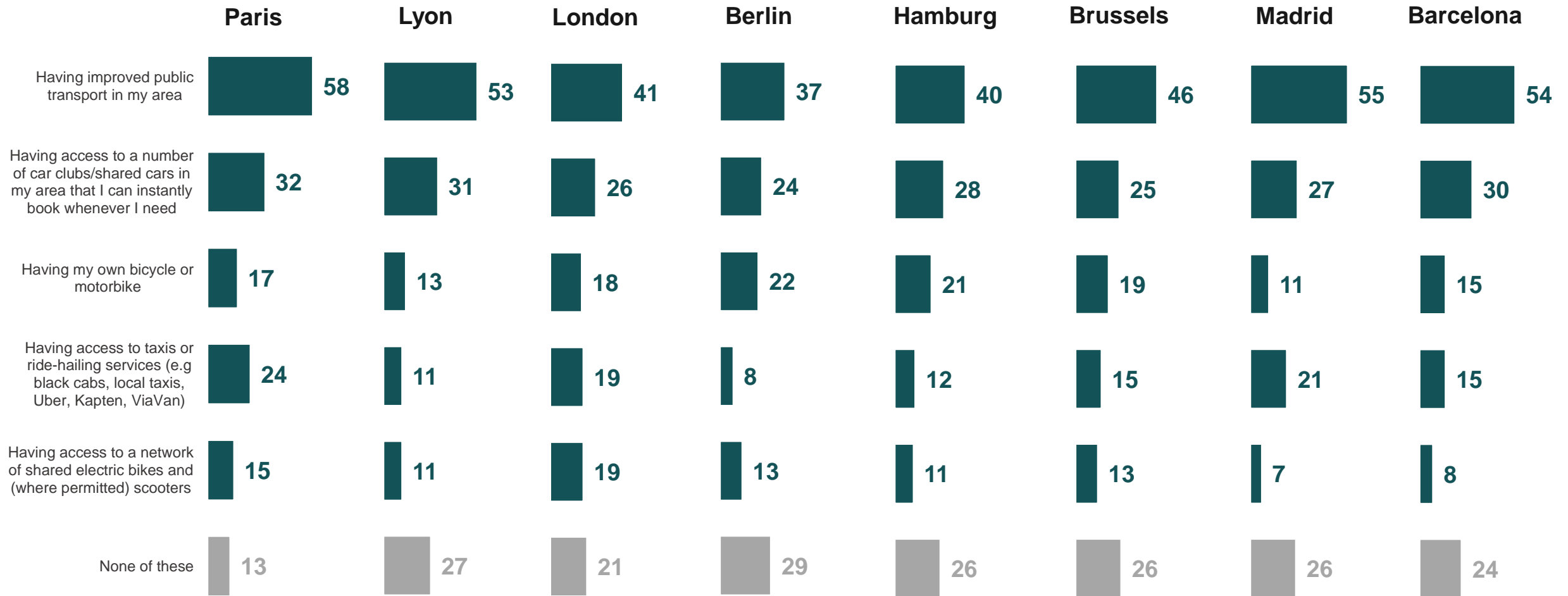
- To those who own a car, in % -



In the most central neighbourhoods, the possibility of car sharing proves goes a long way towards convincing residents to get rid of their car, although not as much as the improvement of public transport

Which of the following would most likely convince you to get rid of your car? (Please do not select more than 2 answers)

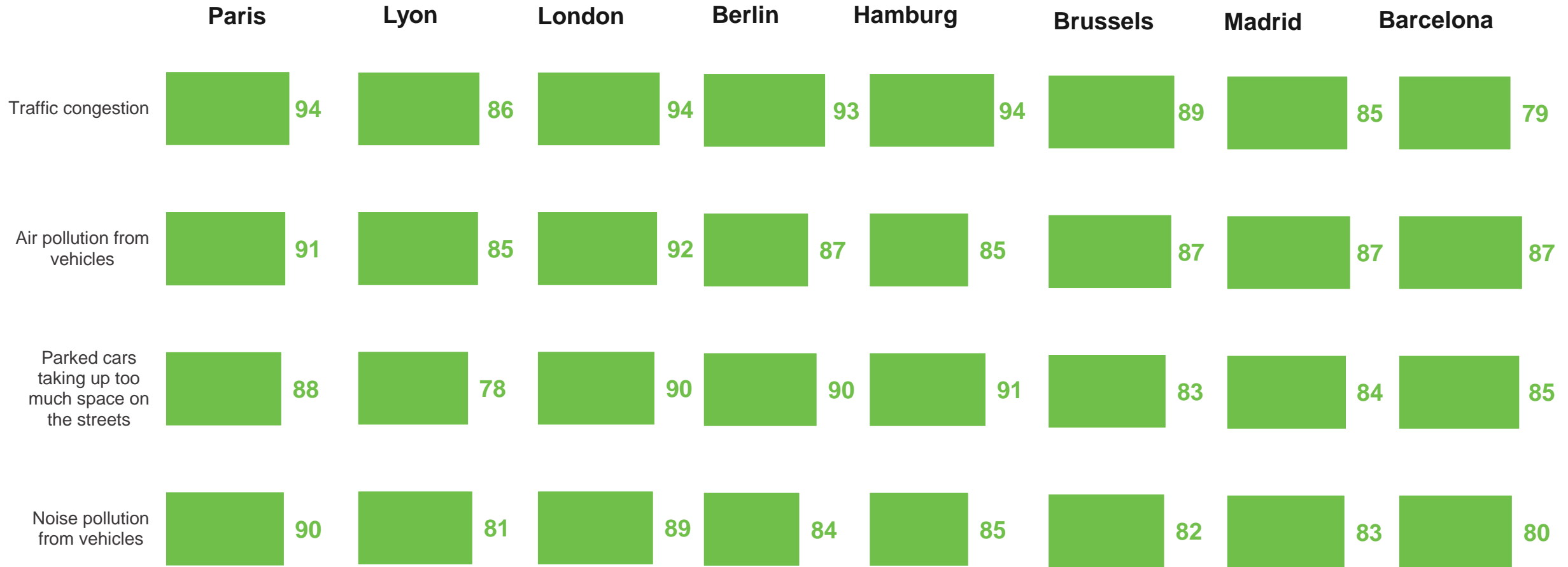
- To those who own a car in all « **Getaround areas of interest** », in % -



In all cities, almost everyone agrees that their city regularly suffers from traffic congestion, air pollution, parked cars taking up too much space on the streets and noise pollution from vehicles

Do you believe your city regularly suffers from the following?

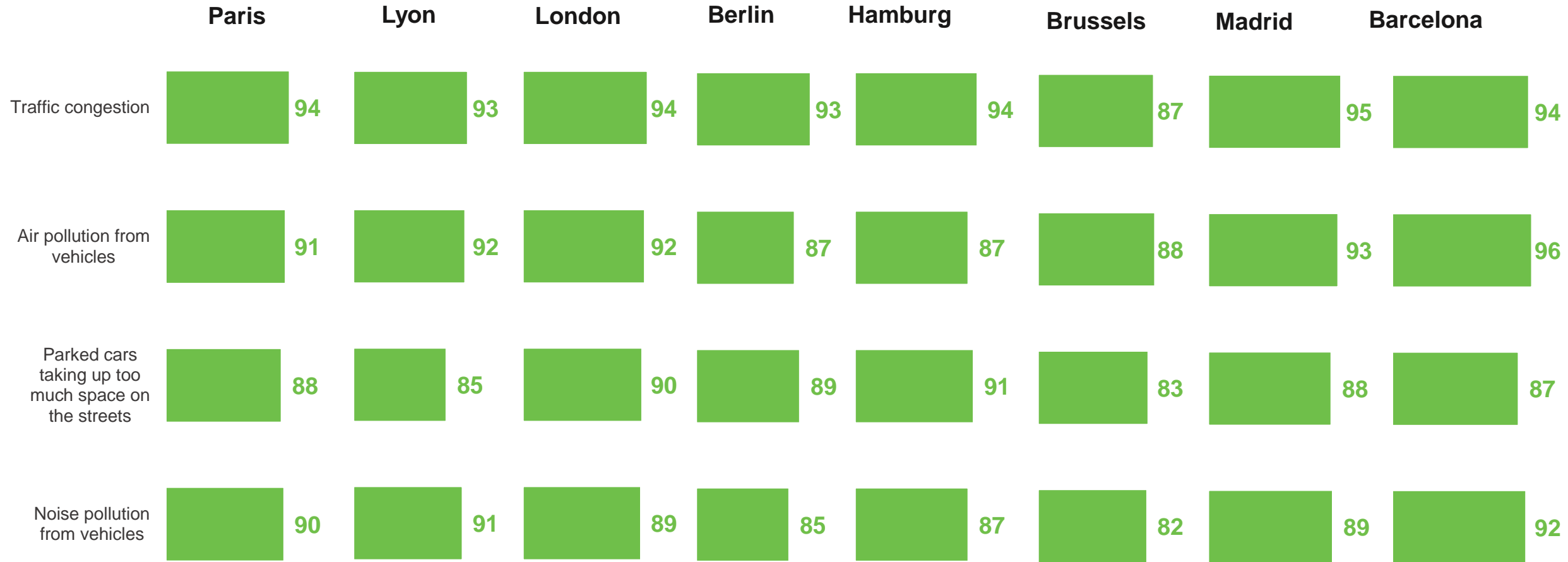
- To all, in % of « Yes » -



In the most central neighbourhoods, there can be no doubt that cars currently cause a great deal of nuisance to the public

Do you believe your city regularly suffers from the following?

- In all « **Getaround areas of interest** », in % of « **Yes** » -



In all cities (and particularly in the Spanish ones), more than three inhabitants out of four believe that their quality of life would improve if there were fewer cars

If there were fewer cars, do you believe your quality of life in [...] would improve?

- To all, in % of « Yes » -

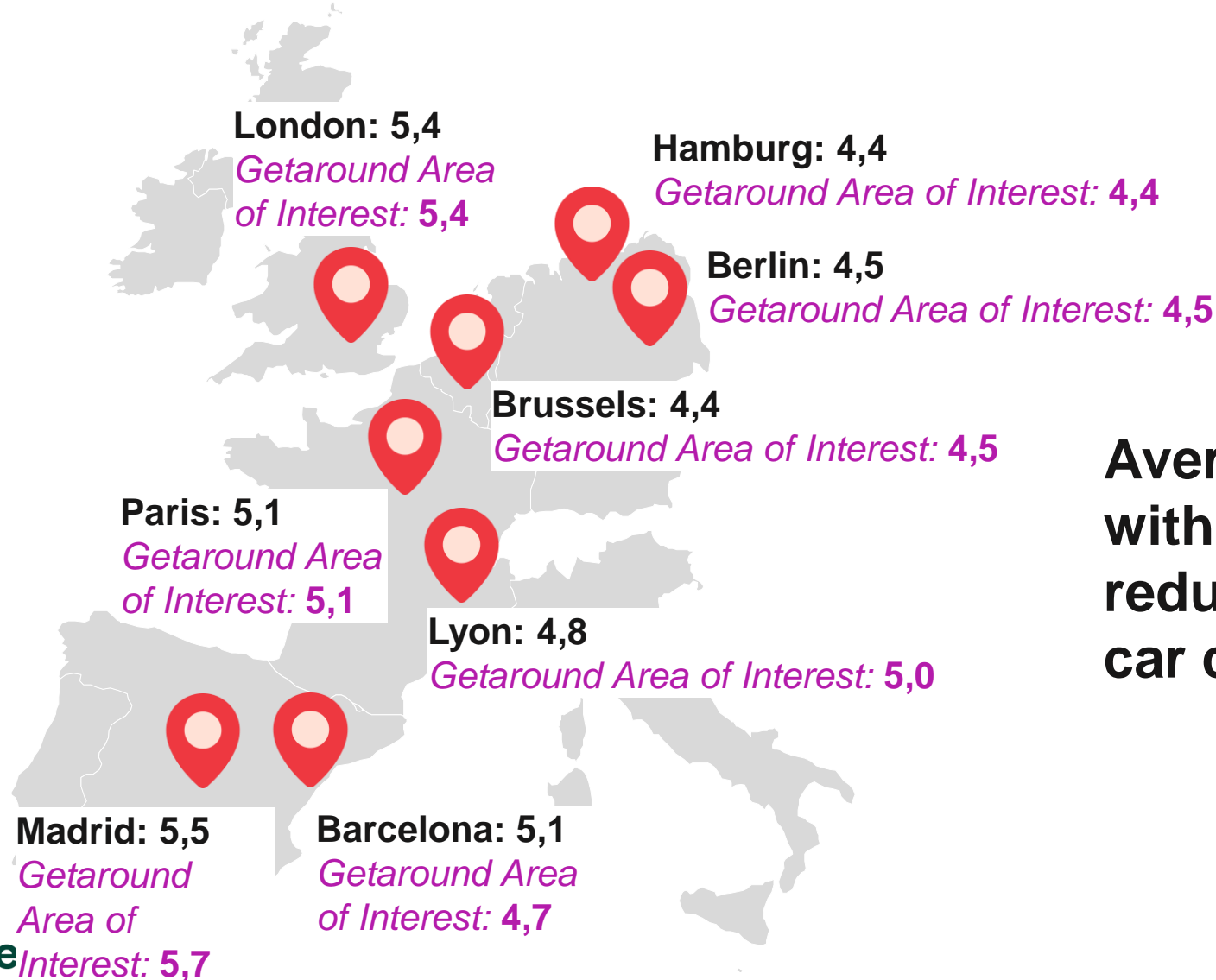


% thinking that if there were fewer cars, their quality of life would improve

On average, the inhabitants from those cities are not really satisfied with the measures being taken to reduce issues related to car congestion: the level of satisfaction barely reaches 5/10 in London, Paris, Lyon, Barcelona and Madrid; it is even lower in German cities and in Brussels

How satisfied are you with the measures being taken in [...] to reduce issues related to car congestion (i.e. traffic jams, public space being taken up by parked cars, etc.)? Answers between 1 and 10, where 1 signifies 'Not at all satisfied' and 10 signifies 'Very satisfied'.

- To all, Average answer -



Average satisfaction with measures taken to reduce issues related to car congestion

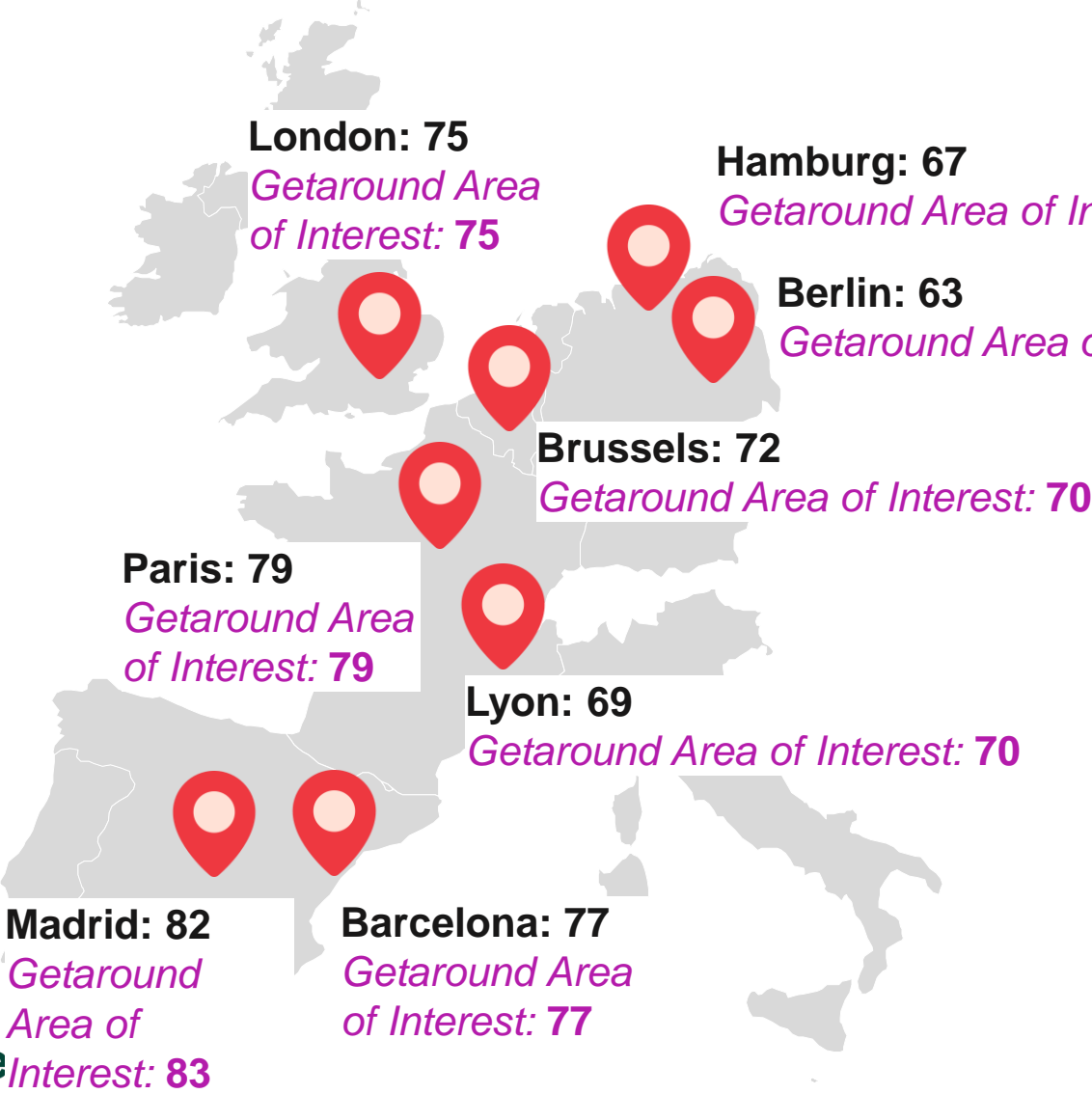
Opinion on car sharing



In all cities, more than two thirds of the population currently have an overall positive opinion of car sharing

Do you have an overall positive or negative opinion of car sharing?

- To all, in % of « Positive » -



% having a positive opinion of car sharing

Around 7 inhabitants out of 10 believe that car sharing could help improve travel in their city; this belief is particularly strong in Madrid and its most central area

Do you think car sharing could help improve travel in your city?

- To all, in % of « Yes » -

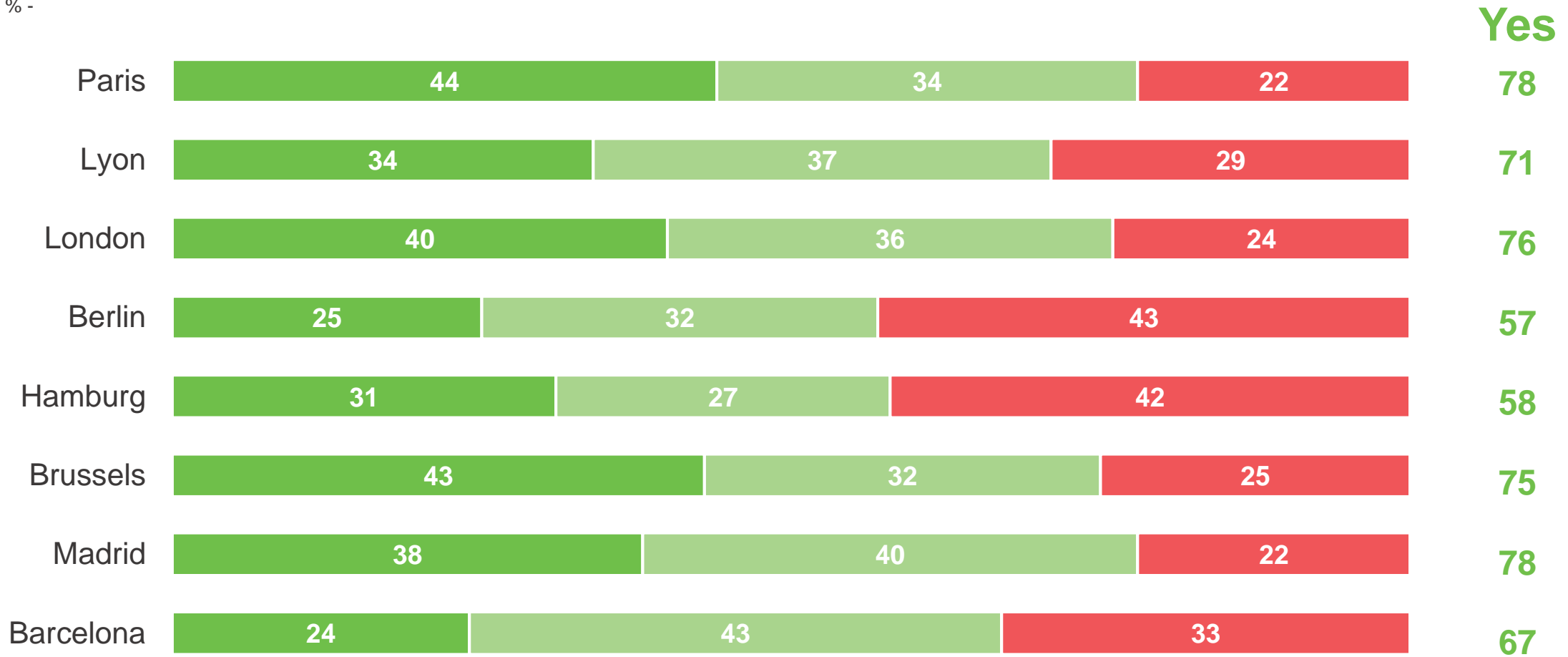


% thinking that car sharing could help improve travel in their city

In most cities (Paris, Lyon, London, Brussels, Barcelona, or even Madrid), more than two thirds of the population would like to have more car sharing services in their own neighbourhood

Would you like to have more car sharing services in your own neighbourhood?

- To all, in % -



■ Yes, for all types of journeys

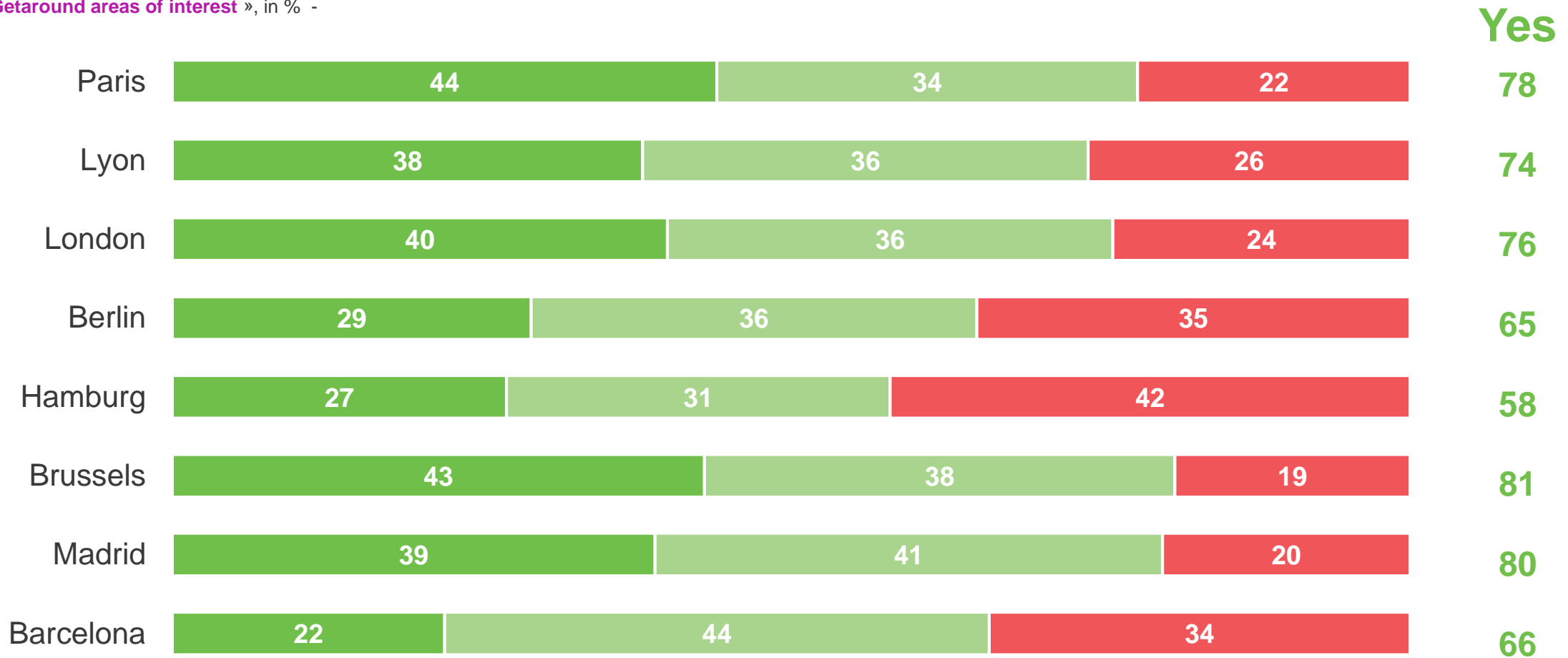
■ Yes, but only for certain types of journeys (long trips, all-day use, to get out the city, etc.)

■ No

The yearning for more care sharing services in one's neighbourhood is even stronger in the most central areas of each city, although slightly less so in Hamburg

Would you like to have more car sharing services in your own neighbourhood?

- In all « **Getaround areas of interest** », in % -



■ Yes, for all types of journeys

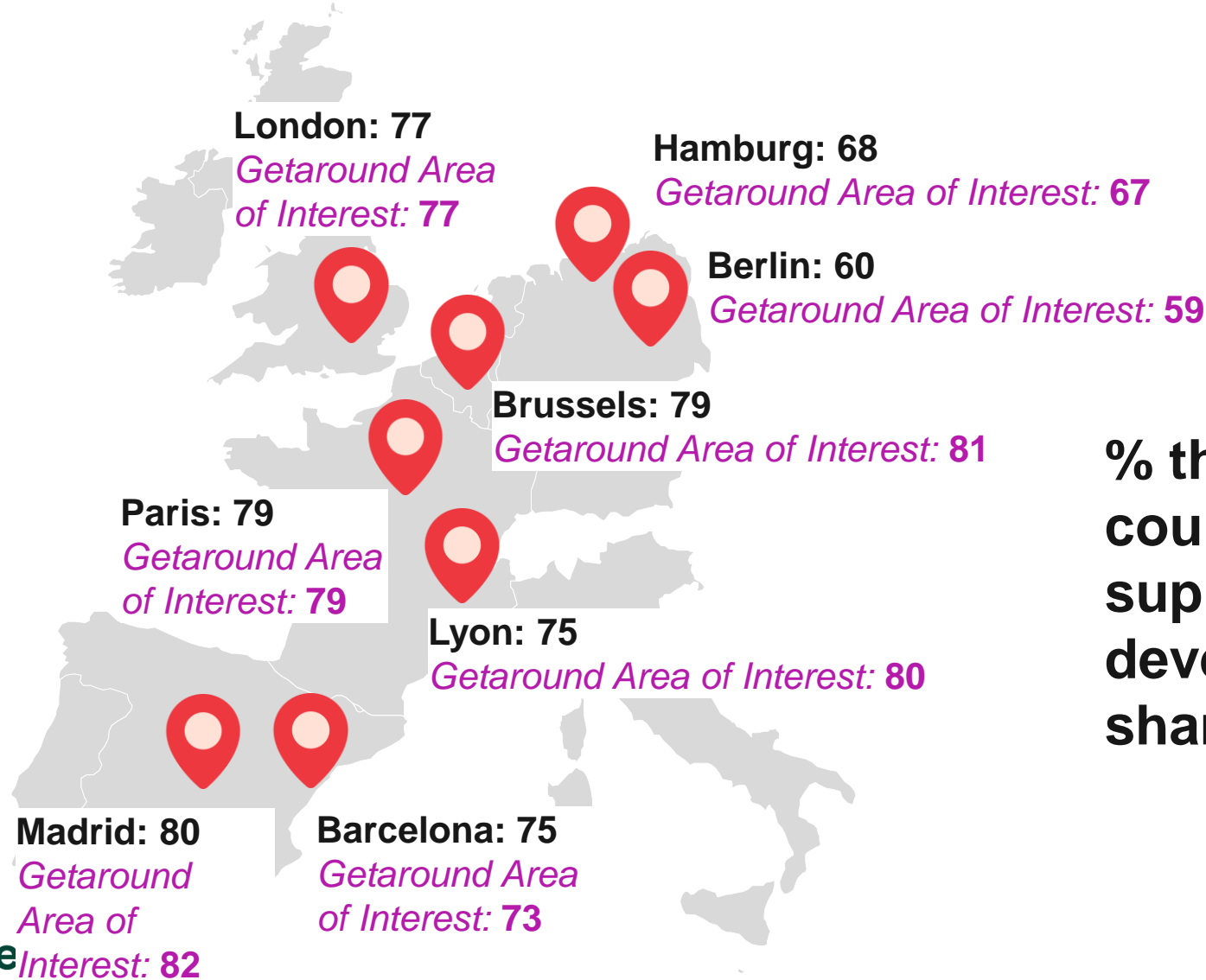
■ Yes, but only for certain types of journeys (long trips, all-day use, to get out the city, etc.)

■ No

In all cities except the German ones, more than three quarters of the population think their local councilor should support the development of car sharing in their area

Do you think your local councilor should support the development of car sharing in your area?

- To all, in % of « Yes » -



% thinking their local councilor should support the development of car sharing in their area

If reducing the number of cars meant having more space available, the inhabitants would like to see this extra space used for multiple purposes: above all creating green areas, but also increasing pedestrian only areas and space for local community activities...

If reducing the number of cars in your city meant having more urban space available, would you like to see this extra space be used for...?

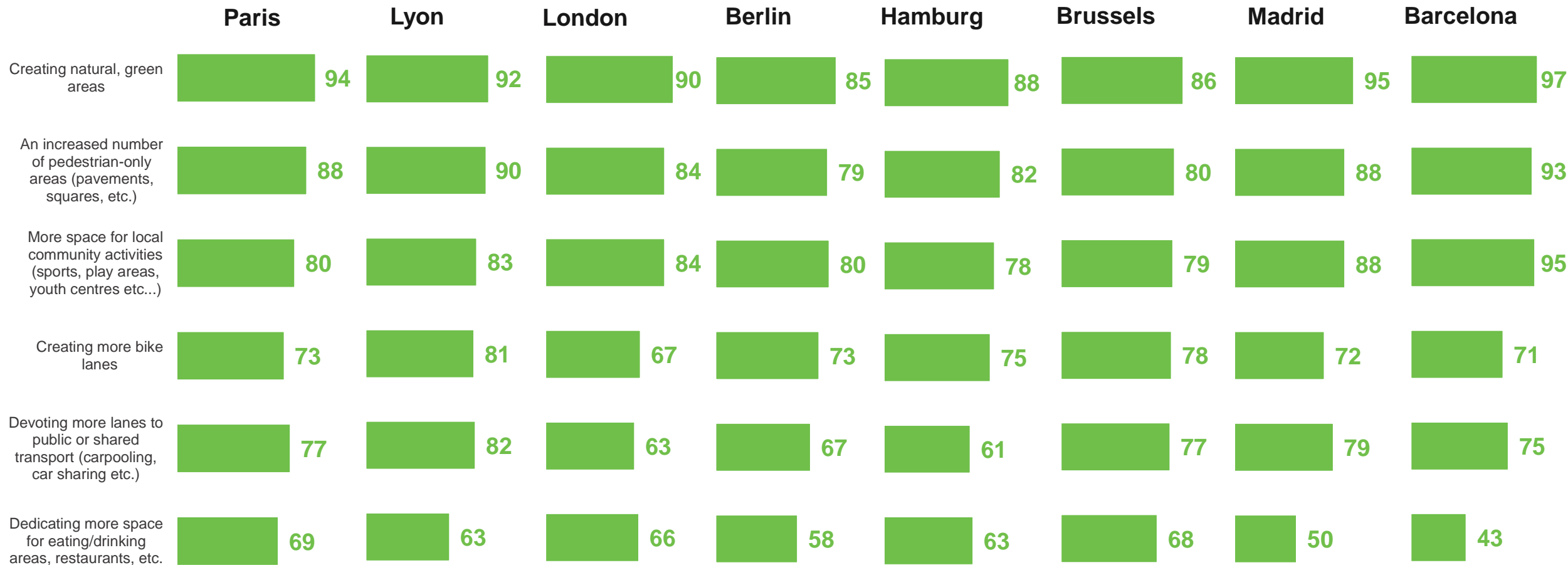
- To all, in % of « Yes » -



In central London, the aspiration for more bike/carpooling lanes is less pronounced than in other cities; while in the heart of Madrid or Barcelona, dedicating more space for eating/drinking areas is not a priority

If reducing the number of cars in your city meant having more urban space available, would you like to see this extra space be used for...?

- In all « **Getaround areas of interest** », in % of « **Yes** » -



Contacts

Merci de noter que toute **diffusion de ces résultats** doit être accompagnée des éléments techniques suivants:
le **nom de l'institut**, le **nom du commanditaire de l'étude**,
la **méthode d'enquête**, les **dates de réalisation** et la **taille de l'échantillon**.

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ahead of what's next