

## TNS Sofres/EIG Objectif Transport Public survey carried out in May 2006

### How are reacting Europeans to rising fuel costs?

Key public transport stakeholders chose the occasion of the European Mobility Exhibition to investigate whether Europeans' transport behaviours have changed in response to the recent sharp increases in fuel prices. This opinion poll supplies fresh detail which will enable new strategies to be developed offering alternatives to private car use. The exhibition will be taking place in Hall 1.1 of Paris-Expo at the Porte de Versailles. Answers to this topical question will be discussed during a debate between experts, professionals, and members of the public, on June 14 from 3-5pm.

*The survey was carried out in France and several other European countries (Germany, Italy, Sweden, and the Czech Republic) on a representative sample of town-dwellers (towns with between 10,000 and 25,000 inhabitants), by telephone or in face-to-face interviews, in May 2006.*

#### Car use in urban areas and types of mobility in Europe

- **The use of private vehicles in urban areas (whether as a driver or as a passenger) is very widespread in most countries** (with fairly similar rates of ownership across all countries): in the Czech Republic, two-thirds of households have at least one car, compared to over 8 out of 10 in other countries and as many as 9 out of 10 in Italy. Around 7 out of 10 individuals use a car at least 2 or 3 days per week, apart from in the Czech Republic where use is less frequent. In most cases, cars are used every day or nearly every day (in half of all cases in France, Italy, Sweden, and Germany) except in the Czech Republic where only 1 in 4 people use them daily.
- Apart from the Czech Republic, **types of mobility are similar across all the countries surveyed**, with just over half of respondents using mainly their car, compared to one quarter who alternate between using their car and public transport. The number of people who use mainly public transport is slightly higher in France and Sweden (11%) than in Germany (7%) or Italy (5%). Most Czechs tend to mix car and public transport use rather than just use their car (40%) or use public transport almost all the time (24%); however, car use in urban areas is less pronounced (21%).

#### Use of public transport in urban areas with more than 20,000 inhabitants.

- **Use of public transport** varies more widely from one country to another. The Czech Republic has the highest usage levels with 9 out of 10 people using public transport, 40% of whom do so every day or nearly every day. At the other end of the scale, in Italy 52% of respondents never use public transport and only 12% do so every day or nearly every day. France lies half way between these two extremes (52% use public transport at least occasionally, and 18% do so every day or nearly every day). In Germany and Sweden, just under two-thirds of respondents use public transport for journeys in urban areas (15% and 19% respectively do so every day or almost every day).

#### Rising fuel prices and changes in travel habits

- **Rising fuel prices** seem to have led to a slight **decrease in daily car use**. The rise in fuel prices seems to have had the greatest impact in Germany (the number of respondents who said they used their car daily prior to the recent increases was 8% higher than now), while there has been a 4% drop in France and Italy and a 2% drop in Sweden and in the Czech Republic.
- Italians and Germans have **changed their transport habits** more than respondents in other countries. Specifically, they say that **they use their car less in town** (58% of those interviewed in Italy, and 59%

in Germany, compared with 49% in France, 46% in the Czech Republic and 33% in Sweden). **The number of people who say they also use their car less for long-distance journeys** was 40% in Germany, 36% in Italy, 24% in France, and 21% in Sweden and in the Czech Republic.

- Getting around town **on foot** seems to have been adopted more by the Italians (65% answered yes) and the Germans (56%) than by the French (53%), the Czechs (51%) and the Swedish (41%).
- There has been a marked renewal of interest in **cycling** in Germany (68%), more so than in the other countries (47% in Sweden, 40% in Italy, 28% in the Czech Republic and 20% in France).
- **Car-sharing** seems to be more in fashion in Germany (62%) than in other countries (48% in Italy, 36% in France, 32% in the Czech Republic and 29% in Sweden).
- **The shift towards urban public transport** has been most noticeable in Italy, Germany, and in the Czech Republic (around 40% of respondents in these countries said they now used this form of transport more, compared to 27% in France and 28% in Sweden). Italy is the foremost country in which more people have started **using the train for long-distance travel** (47%), followed by 33% in Germany, 29% in Sweden, 25% in France and 16% in the Czech Republic.
- **There has been an increase in the use of powered two-wheeled vehicles**, but on a smaller scale (21% in Italy, 18% in Germany, 9% in France, 6% in Sweden and 3% in the Czech Republic).

## The effect of any further increase in fuel prices on changes in travel habits

- **If fuel prices were to rise by a further 50%, putting the price of a litre of regular unleaded petrol at around 2 euros**, travel behaviour changes seem likely to be more pronounced. Germans and Italians would again be the most sensitive to this and would change their transport habits the most, with the French just behind.
- The biggest change would be **people's use of cars in towns and cities** (nearly 8 out of 10 people interviewed would be willing to use it less, in all countries surveyed except for Sweden, where just over half of respondents would change their behaviour). However, **for long distances**, reduced car use is less pronounced, with 6 out of 10 individuals saying they would change their habits in Germany and Italy, compared to 1 person in 2 in the other countries. **Changing cars for a vehicle with better fuel consumption** is also an option favoured more in Germany (61%) than in other countries (58% in France, 48% in Italy and in Sweden and 36% in the Czech Republic). **Car-sharing** would be envisaged as a viable alternative if there were such a rise in fuel prices, particularly in Germany and in France (69% and 63% respectively). This change in attitude is less pronounced in Italy (58%), the Czech Republic (50%), and Sweden (40%). Those in employment are less likely to consider **giving up their car**: 1 in 3 of the Germans, French, and Italians, and around 1 out of 10 individuals in Sweden (8%) and in the Czech Republic (10%).
- **The shift towards public transport** in this case is more pronounced in France, Germany, and in Italy, both for urban transport (59% in Italy, 58% in France and 54% in Germany) and for using the train for long-distance journeys (63% in Italy, 57% in France and 56% in Germany). Behaviour changes are less pronounced in Sweden (50% would use urban transport more and 46% would use the train) and in the Czech Republic (47% would use urban transport more and 41% would use the train).

Very few people in employment would consider **moving to be closer to their place of work** (18% of the French, 16% of Germans, 14% of Italians and only 6% of Czechs and 5% of Swedes).

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