



Europeans and new forms of mobility

September 2017

“opinionway

15 place de la République 75003 Paris



ESOMAR¹⁷
|corporate



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Department Director

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THE METHODOLOGY

“opinionway

“ Methodology



The survey was carried out on a sample of 5021 people in Germany, Spain, France, Italy and the Netherlands:



The samples are representative of national populations aged 18 and over, using criteria of gender, age and region of residence.



The samples were surveyed using a self-administered online questionnaire on the CAWI system (Computer Assisted Web Interview).



The interviews were carried out from **21 to 28 August 2017**.



The results of this survey must be read taking into account the following **margins of uncertainty**: 0.6 to 1.4 points at most for a sample of 5,000 respondents.

Any full or partial publication must include the following wording:

“OpinionWay Survey for ALD Automotive”

and this wording must be included whenever the survey is reused.



THE RESULTS

“opinionway

“ The usefulness of owning a car in one’s daily life (1/7)

Q1: In your daily life, would you say that owning a car is... ?



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002

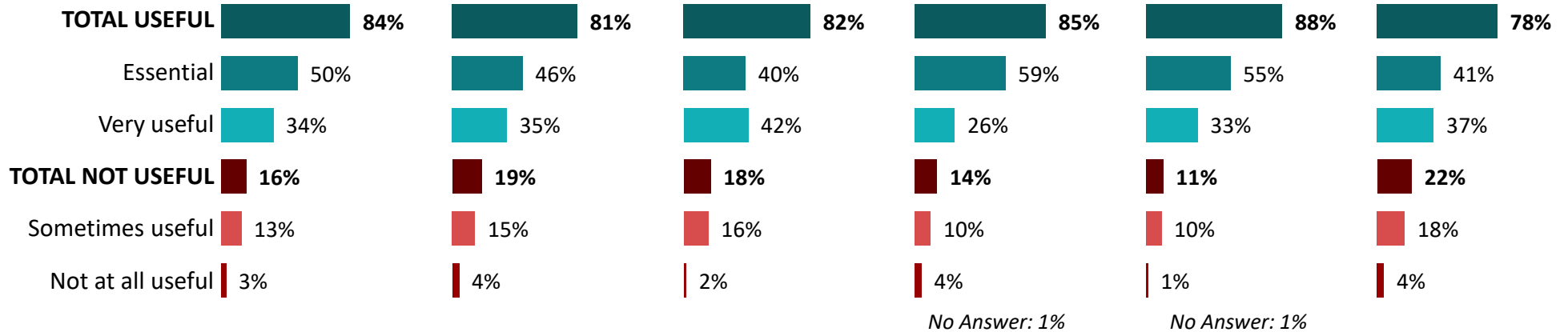


ITALY
Base: 1003

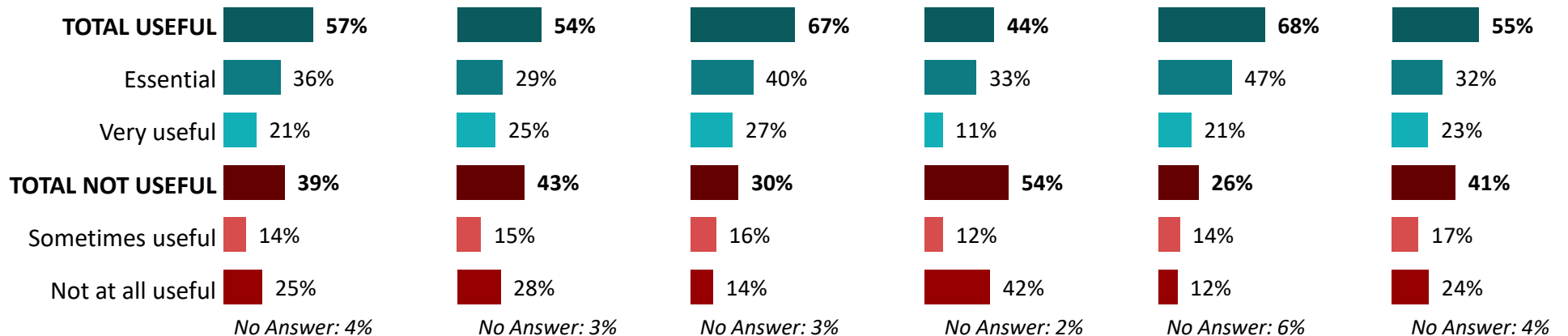


NETHERLANDS
Base: 1008

Personal journeys

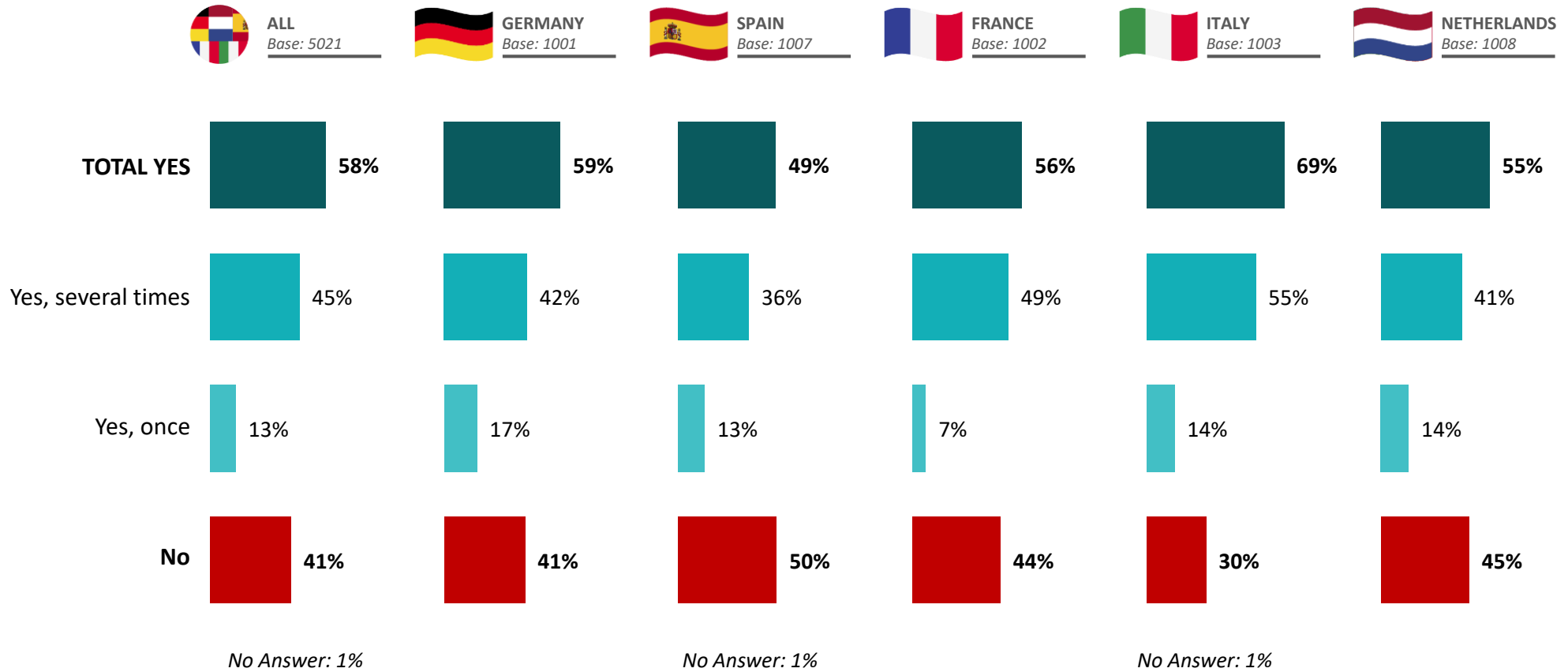


Home-to-work journeys



“ Taking into account the environment when choosing a means of transport (1/7)

Q2: If you had the choice, have you ever favoured a slower but more environmentally-friendly means of transport over an other?





Transport solutions used

Q3: Have you ever used the following solutions?

Car-pooling (as a driver or passenger)



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008

Yes, you have used this solution before



27%



34%



25%



29%



15%



29%

TOTAL NO



72%



66%



74%



71%



83%



69%

No, but you would be able to say what it is



49%



54%



47%



51%



49%



26%

No, you have heard of it, but you don't know what it is



15%



6%



21%



14%



21%



32%

No, and you have never heard of it



8%



6%



6%



6%



13%



11%

TOTAL KNOWS

76%

No Answer: 1%

88%

No Answer: 1%

72%

80%

No Answer: 2%

64%

55%

No Answer: 2%



Transport solutions used

Q3: Have you ever used the following solutions?

Self-service car rental for short urban trips



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002

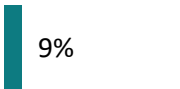


ITALY
Base: 1003



NETHERLANDS
Base: 1008

Yes, you have used this solution before



9%



8%



13%



5%



13%



6%

TOTAL NO



90%



91%



86%



95%



86%



92%

No, but you would be able to say what it is



52%



72%



35%



55%



41%



19%

No, you have heard of it, but you don't know what it is



22%



10%



29%



26%



25%



36%

No, and you have never heard of it



16%



9%



22%



14%



20%



37%

TOTAL KNOWS

61%

No Answer: 1%

80%

No Answer: 1%

48%

No Answer: 1%

60%

No Answer: 1%

54%

25%

No Answer: 2%



Transport solutions used

Q3: Have you ever used the following solutions?

Long-term car rental from a company, manufacturer, or other



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008

Yes, you have used this solution before



12%



8%



16%



12%



17%



10%

TOTAL NO



87%



92%



83%



88%



82%



89%

No, but you would be able to say what it is



46%



54%



36%



50%



46%



23%

No, you have heard of it, but you don't know what it is



23%



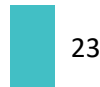
17%



28%



23%



23%



40%

No, and you have never heard of it



18%



21%



19%



15%



13%



26%

TOTAL KNOWS

58%

62%

52%

62%

63%

33%

No Answer: 1%

No Answer: 1%

No Answer: 1%

No Answer: 1%



Transport solutions used

Q3: Have you ever used the following solutions?

Car rental between individuals



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008

Yes, you have used this solution before



9%



10%



9%



5%



11%



7%

TOTAL NO



90%



90%



90%



94%



87%



92%

No, but you would be able to say what it is



49%



58%



42%



58%



40%

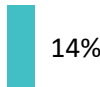


23%

No, you have heard of it, but you don't know what it is



24%



14%



30%



26%



27%



42%

No, and you have never heard of it



17%



18%



18%



10%



20%



27%

TOTAL KNOWS

58%

68%

51%

63%

51%

30%

No Answer: 1%

No Answer: 1%

No Answer: 1%

No Answer: 2%

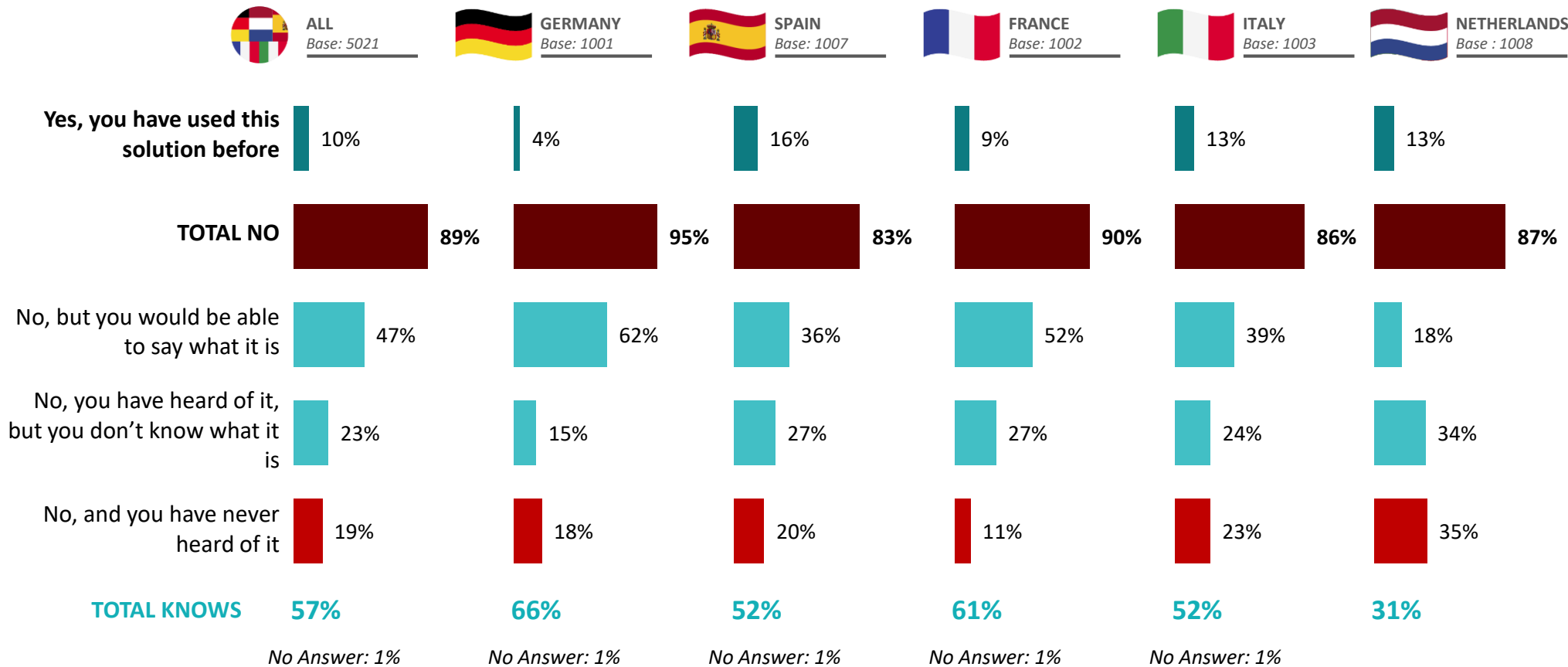
No Answer: 1%



Transport solutions used

Q3: Have you ever used the following solutions?

Chauffeur-driven vehicles





Transport solutions used

Q3: Have you ever used the following solutions?

Summary - % Users



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008





The main advantage of car sharing

Q4: In your opinion, what is the main advantage of car sharing, i.e. renting a car for a limited period from a company or community?



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



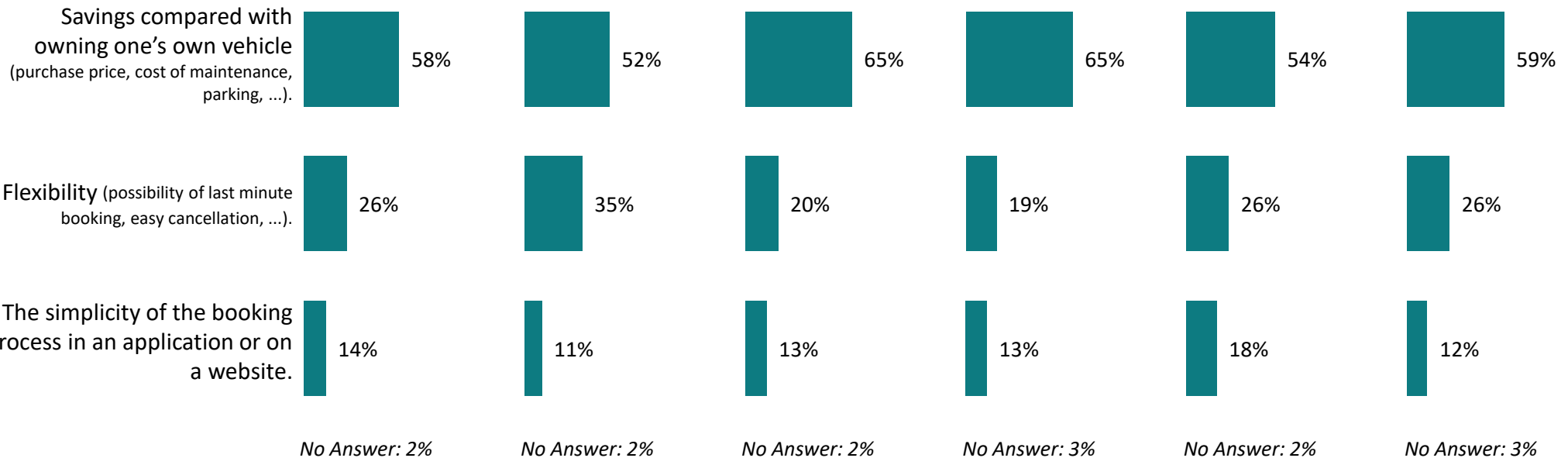
FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008



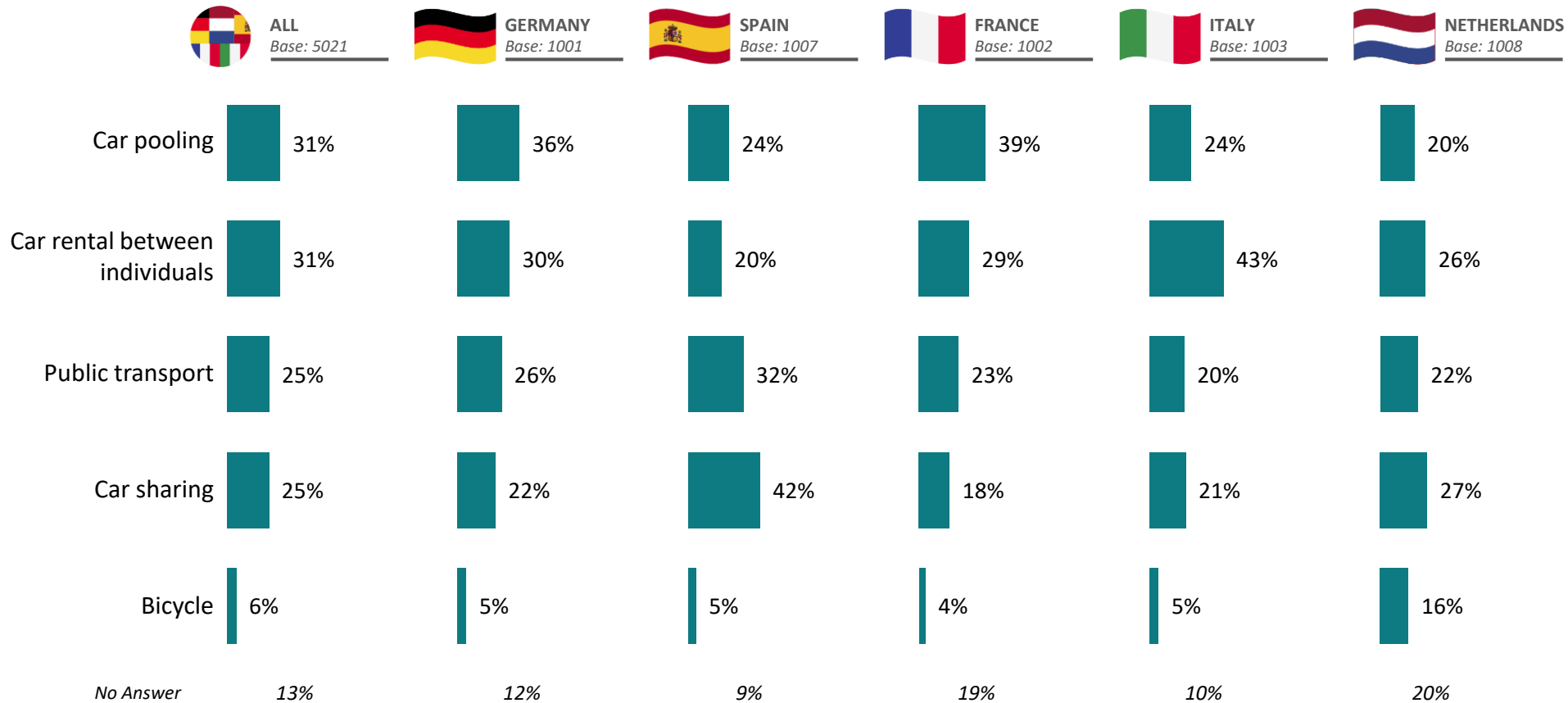


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To a wedding



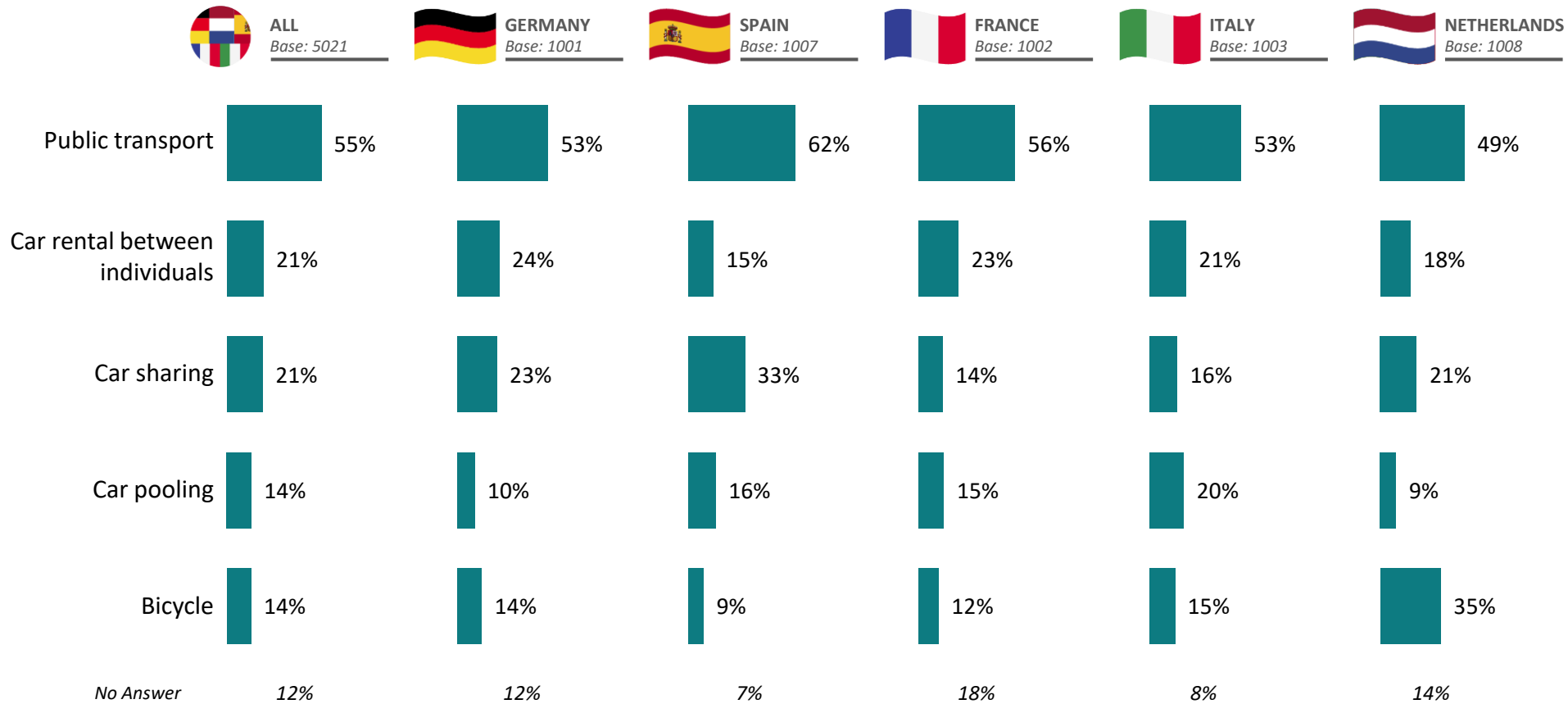


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To a job interview



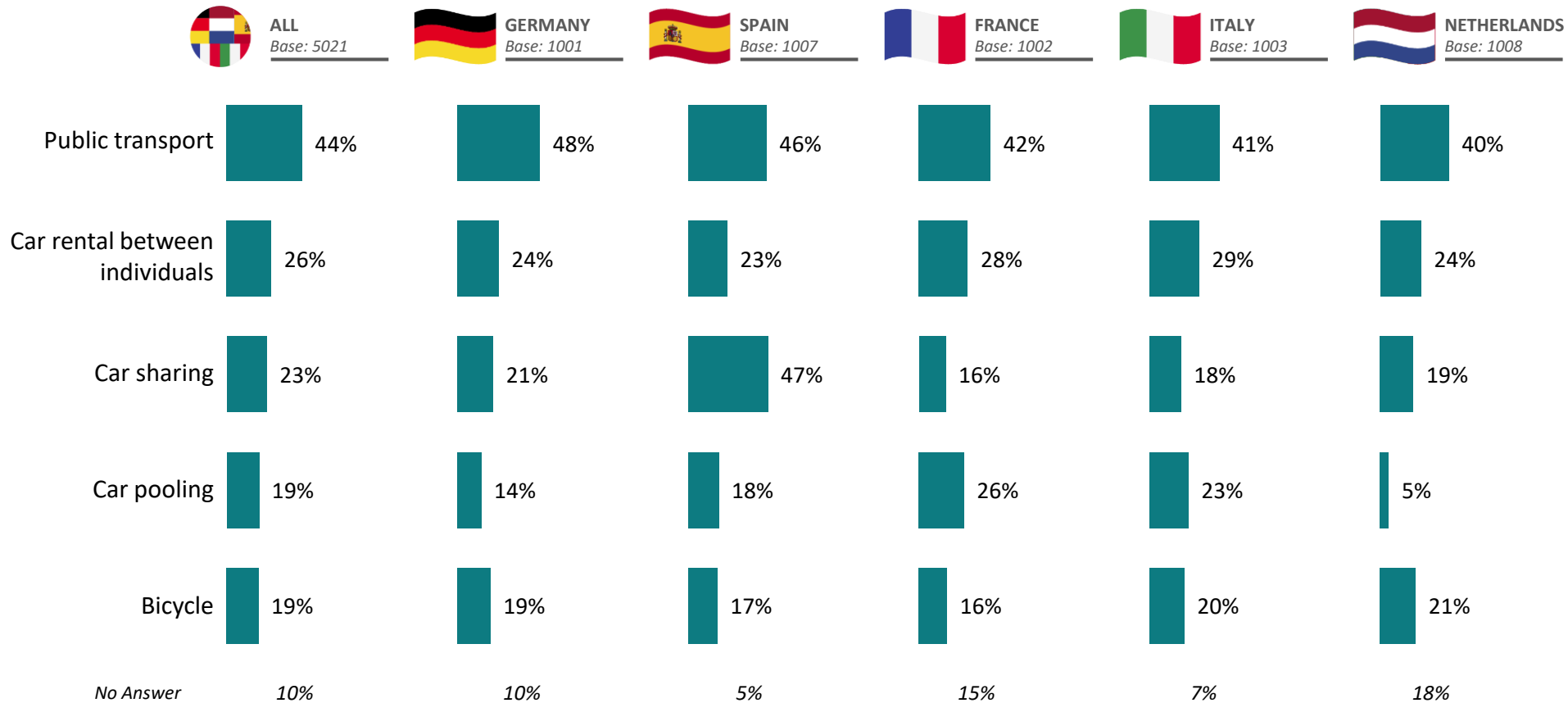


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To your holiday destination



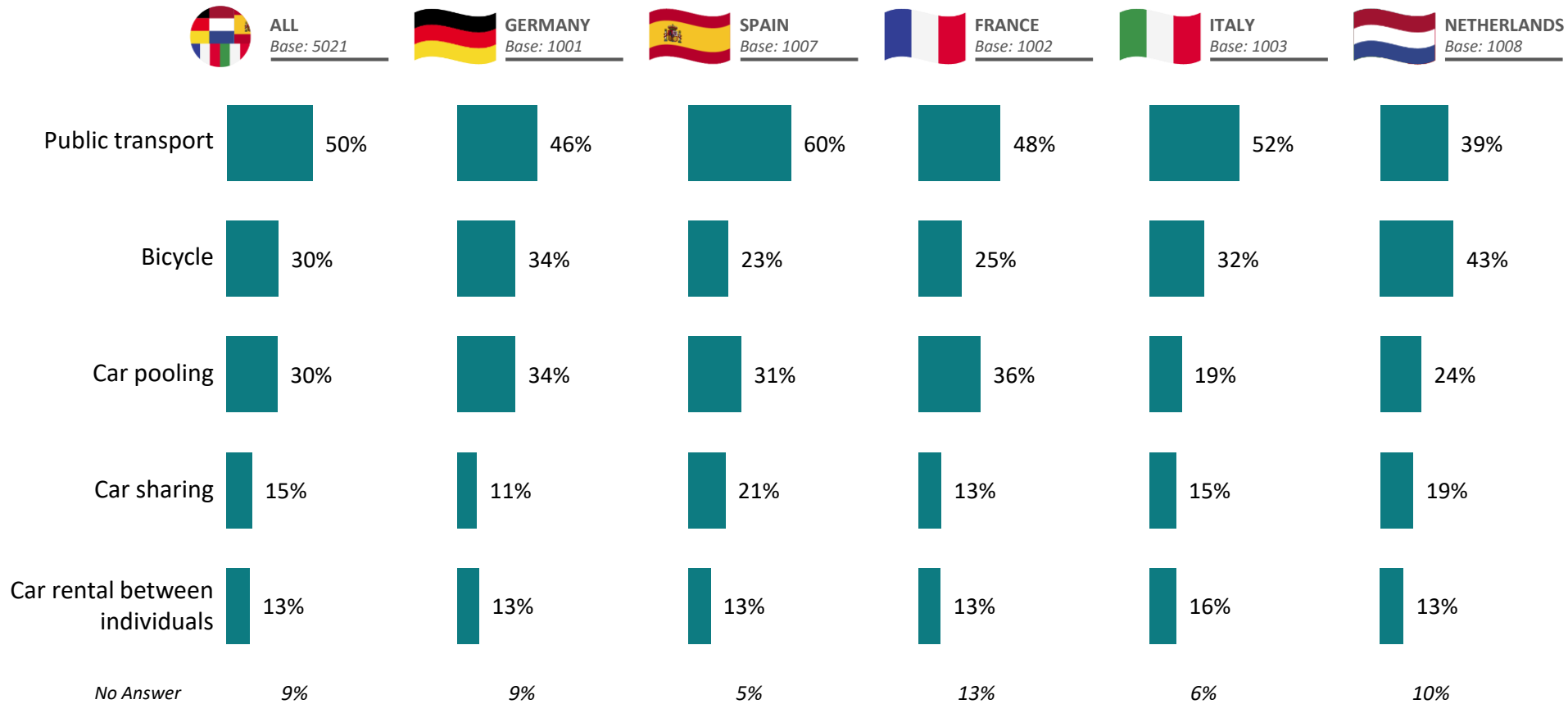


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To and from your place of work



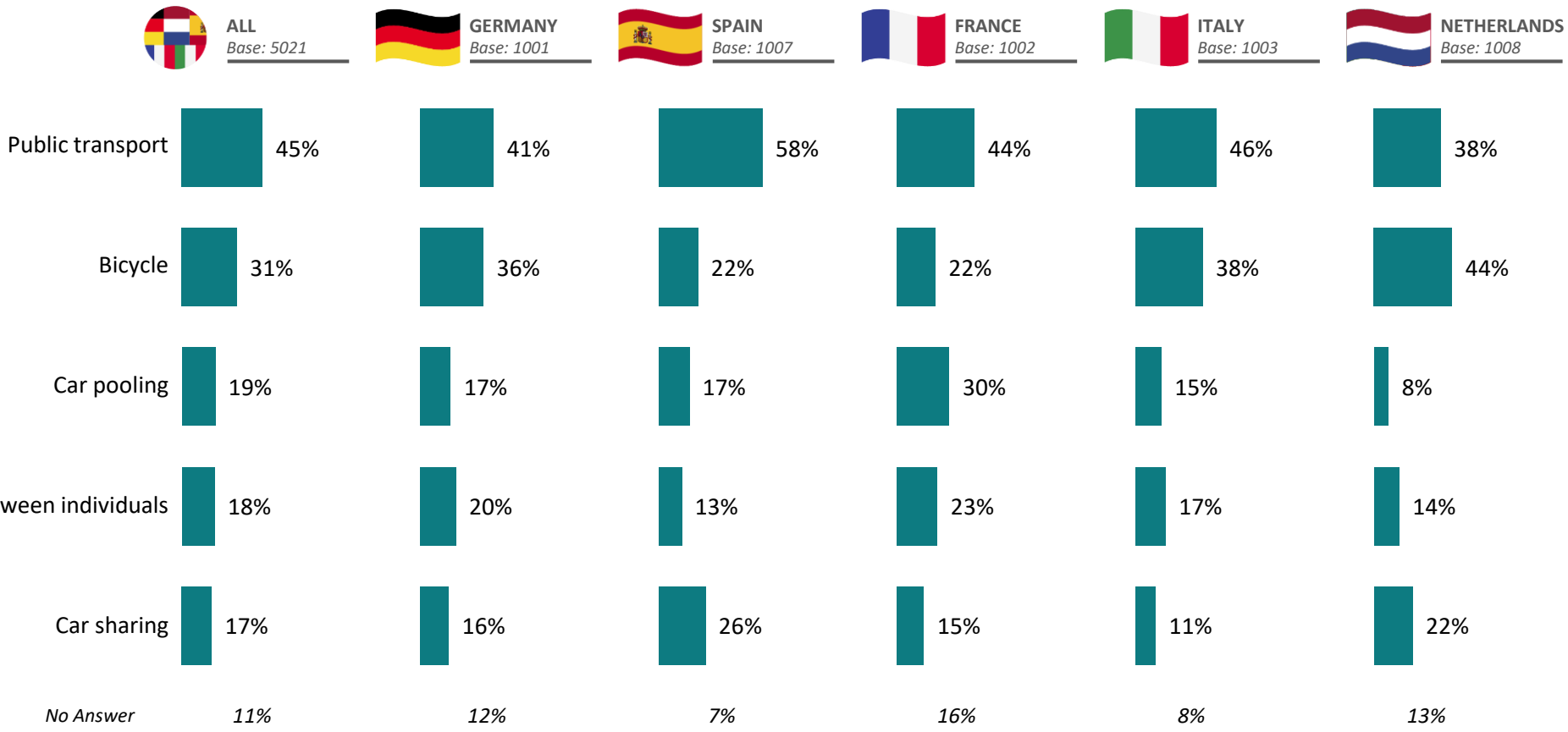


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To your parents'



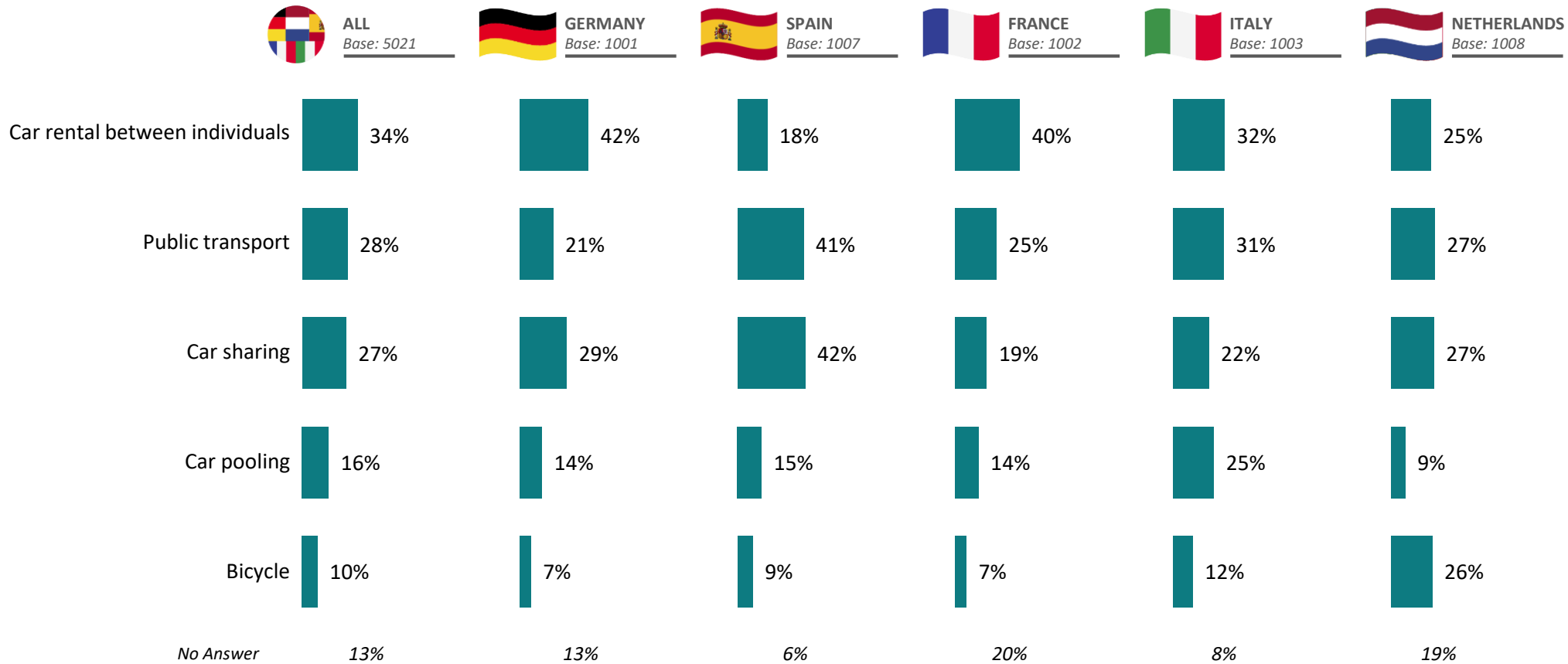


Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

To a shopping zone to purchase furniture, garden items, etc.





Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

TOP 3 per occasion



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008

To a wedding

Rank	ALL (Base: 5021)	GERMANY (Base: 1001)	SPAIN (Base: 1007)	FRANCE (Base: 1002)	ITALY (Base: 1003)	NETHERLANDS (Base: 1008)
#1	Car pooling 31%	Car pooling 36%	Car sharing 42%	Car pooling 39%	Rental between individuals 43%	Car sharing 27%
#2	Rental between individuals 31%	Rental between individuals 30%	Public transport 32%	Rental between individuals 29%	Car pooling 24%	Rental between individuals 26%
#3	Public transport + Car sharing 25%	Public transport 26%	Car pooling 24%	Public transport 23%	Car sharing 21%	Public transport 22%

To a job interview

Rank	ALL (Base: 5021)	GERMANY (Base: 1001)	SPAIN (Base: 1007)	FRANCE (Base: 1002)	ITALY (Base: 1003)	NETHERLANDS (Base: 1008)
#1	Public transport 55%	Public transport 53%	Public transport 62%	Public transport 56%	Public transport 53%	Public transport 49%
#2	Rental between individuals 21%	Rental between individuals 24%	Car sharing 33%	Rental between individuals 23%	Rental between individuals 21%	Bicycle 35%
#3	Car sharing 21%	Car sharing 23%	Car pooling 16%	Car pooling 15%	Car pooling 20%	Car sharing 21%

To your holiday destination

Rank	ALL (Base: 5021)	GERMANY (Base: 1001)	SPAIN (Base: 1007)	FRANCE (Base: 1002)	ITALY (Base: 1003)	NETHERLANDS (Base: 1008)
#1	Public transport 44%	Public transport 48%	Car sharing 47%	Public transport 42%	Public transport 41%	Public transport 40%
#2	Rental between individuals 26%	Rental between individuals 24%	Public transport 46%	Rental between individuals 28%	Rental between individuals 29%	Rental between individuals 24%
#3	Car sharing 23%	Car sharing 21%	Rental between individuals 23%	Car pooling 26%	Car pooling 23%	Bicycle 21%



Preferred means of transport for specific occasions

Q5: Would you be willing to use the following means of transport to go...?

Several answers possible

TOP 3 per occasion



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002



ITALY
Base: 1003



NETHERLANDS
Base: 1008

To and from your place of work

Rank	ALL	GERMANY	SPAIN	FRANCE	ITALY	NETHERLANDS
#1	Public transport 50%	Public transport 46%	Public transport 60%	Public transport 48%	Public transport 52%	Bicycle 43%
#2	Bicycle 30%	Bicycle 34%	Car pooling 31%	Car pooling 36%	Bicycle 32%	Public transport 39%
#3	Car pooling 30%	Car pooling 34%	Bicycle 23%	Bicycle 25%	Car pooling 19%	Car pooling 24%

To your parents'

Rank	ALL	GERMANY	SPAIN	FRANCE	ITALY	NETHERLANDS
#1	Public transport 45%	Public transport 41%	Public transport 58%	Public transport 44%	Public transport 46%	Bicycle 44%
#2	Bicycle 31%	Bicycle 36%	Car sharing 26%	Car pooling 30%	Bicycle 38%	Public transport 38%
#3	Car pooling 19%	Rental between individuals 20%	Bicycle 22%	Rental between individuals 23%	Rental between individuals 17%	Car sharing 22%

To a shopping zone to purchase furniture, garden items, etc.

Rank	ALL	GERMANY	SPAIN	FRANCE	ITALY	NETHERLANDS
#1	Rental between individuals 34%	Rental between individuals 42%	Car sharing 42%	Rental between individuals 40%	Rental between individuals 32%	Public transport 27%
#2	Public transport 28%	Car sharing 29%	Public transport 41%	Public transport 25%	Public transport 31%	Car sharing 27%
#3	Car sharing 27%	Public transport 21%	Rental between individuals 18%	Car sharing 19%	Car pooling 25%	Bicycle 26%



Frequency of use of mobile applications

Q6: For each of the following types of mobile application relating to mobility, how many do you use at least once a month?

Open numerical question

Once Twice or more **XX%: Total users**



ALL
Base: 5021



GERMANY
Base: 1001



SPAIN
Base: 1007



FRANCE
Base: 1002

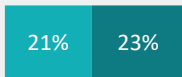


ITALY
Base: 1003

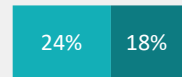


NETHERLANDS
Base: 1008

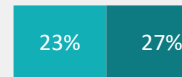
Public transport applications
(route planners, timetables, ...)



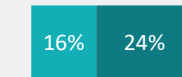
average 1.4



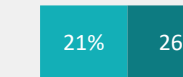
average 1.0



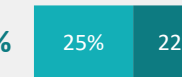
average 1.9



average 1.4



average 1.8



average 1.3

Road traffic and community GPS
applications



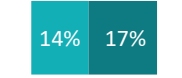
average 0.9



average 0.5



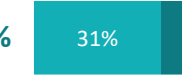
average 0.9



average 1.1



average 1.0

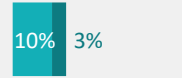


average 1.4

Car pooling applications



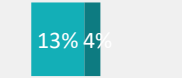
average 0.3



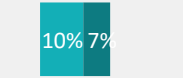
average 0.2



average 0.4



average 0.3



average 0.4



average 0.1

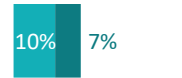
Car sharing applications



average 0.2



average 0.2



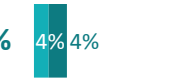
average 0.4



average 0.2

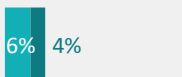


average 0.3



average 0.3

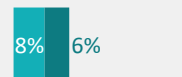
Chauffeur-driven vehicles
applications



average 0.2



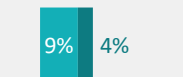
average 0.1



average 0.3



average 0.2

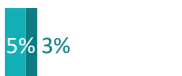


average 0.3

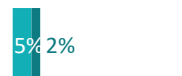


average 0.3

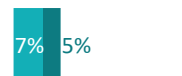
Cycle share applications



average 0.2



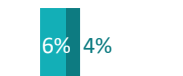
average 0.1



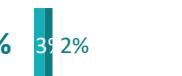
average 0.3



average 0.2



average 0.2



average 0.1

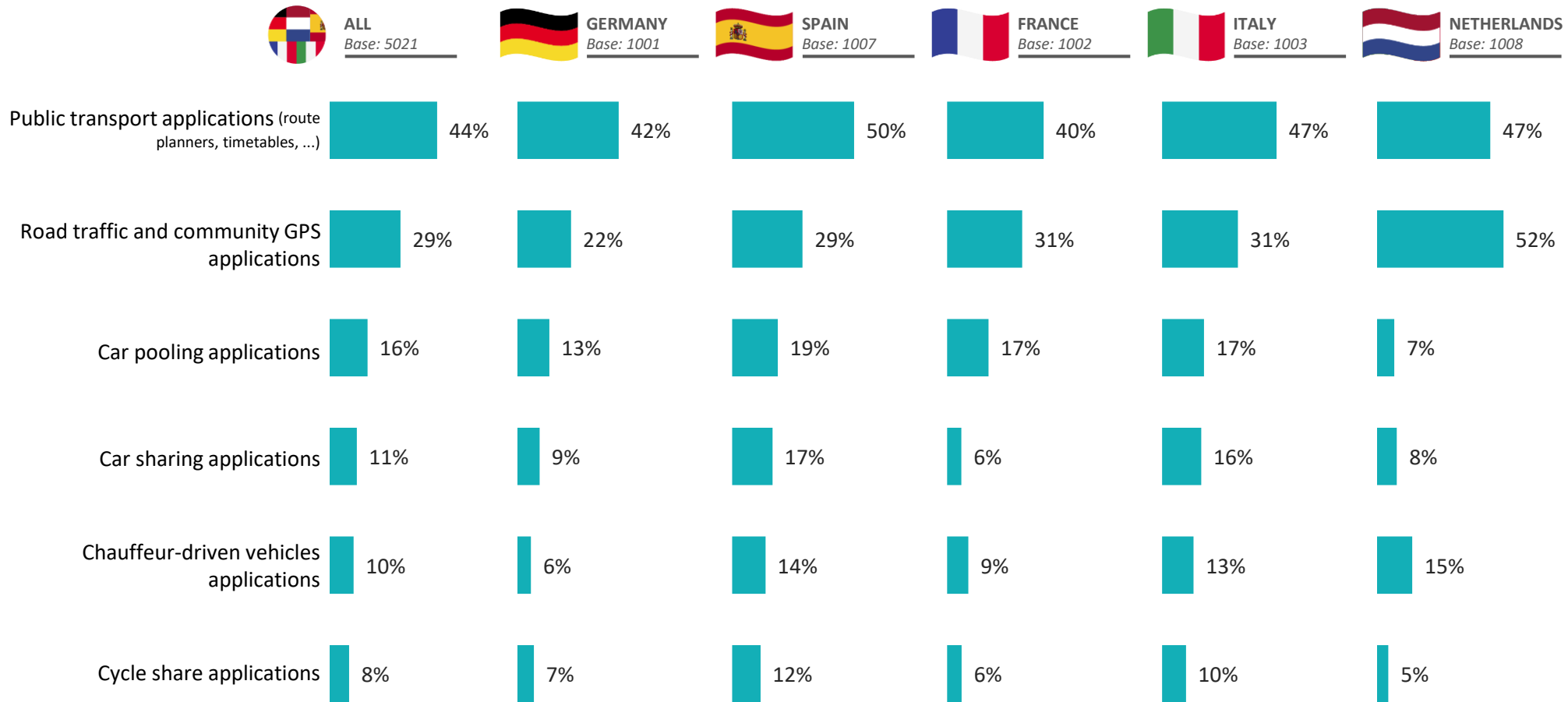


Frequency of use of mobile applications

Q6: For each of the following types of mobile application relating to mobility, how many do you use at least once a month?

Open numerical question

XX%: Total users





“opinionway

15 place de la République 75003 Paris

« Notre mission est de permettre à nos clients de comprendre de manière simple et rapide leur environnement actuel et futur, pour mieux décider aujourd’hui, agir demain et imaginer après-demain. »