



## Special Eurobarometer 422a

# QUALITY OF TRANSPORT

## SUMMARY

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This survey has been requested by the European Commission, Directorate-General for Mobility and Transport (DG MOVE) and co-ordinated by Directorate-General for Communication (DG COMM).

[http://ec.europa.eu/public\\_opinion/index\\_en.htm](http://ec.europa.eu/public_opinion/index_en.htm)

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The interpretations and opinions contained in it are solely those of the authors.

**Special Eurobarometer 422a / Wave EB82.2 – TNS Opinion & Social**

## **Special Eurobarometer 422a**

# **Quality of Transport**

Conducted by TNS Opinion & Social at the request of  
the European Commission,  
Directorate-General for Mobility and Transport (DG MOVE)

Survey co-ordinated by the European Commission,  
Directorate-General Communication  
DG COMM "Strategy, Corporate Communication Actions and  
Eurobarometer" Unit)

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## INTRODUCTION

Transport directly affects everyone in Europe. Whatever age we are and whatever activities we undertake, transportation and mobility play a fundamental role for our daily lives and for business. The estimated annual budget of the average EU household for transport is € 4 530. With a population of over 505 million this represents a significant investment.

The aim of the European Commission's Directorate General for Mobility and Transport (DG MOVE) is to promote transport solutions that are efficient, safe, secure and environmentally friendly and to create the conditions for a competitive industry, generating growth and jobs. With this in mind, DG MOVE is actively working on a range of activities that concern all modes of transportation: policy making and the proposition of new laws, project funding and research as well as activities to increase citizen's awareness. Furthermore, DG MOVE provides statistical insights to all interested parties: decision makers, industries, citizens and media - for example, the annual statistical pocketbook or the recent EU Transport Scoreboard.

DG MOVE commissioned this survey to gather information from European citizens, understand their habits, hear their opinions and analyse their perceptions of transport related matters. The survey focussed on:

- The most frequently used modes of transport for daily trips and long journeys and the reasons these modes were chosen;
- How to encourage people who use cars and motorbikes to use public transport ;
- The perceptions of the quality of road, air, rail and sea transport over the last five years and the most serious problems affecting these modes of transport;
- How to make the transport sector more appealing for job seekers.

This survey was carried out by TNS Opinion & Social network in the 28 Member States of the European Union between the 11<sup>th</sup> and 20<sup>th</sup> of October 2014. Some 27.868 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue on behalf of the Directorate-General for Mobility and Transport. The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit)<sup>1</sup>. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals<sup>2</sup>.

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

ABBREVIATIONS			
BE	Belgium	LV	Latvia
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
HR	Croatia	SI	Slovenia
IE	Ireland	SK	Slovakia
IT	Italy	FI	Finland
CY	Republic of Cyprus***	SE	Sweden
LT	Lithuania	UK	The United Kingdom
		EU28	European Union – 28 Member States
		EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI*
		NMS13	BG, CZ, EE, HR, CY, LT, LV, MT, HU, PL, RO, SI, SK**
		EURO AREA	BE, FR, IT, LV, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK

\* EU15 refers to the 15 countries forming the European Union before the enlargements of 2004, 2007 and 2013

\*\* The NMS13 are the 13 'new Member States' which joined the European Union during the 2004, 2007 and 2013 enlargements

\*\*\* 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 Europe who have given their time to take part in this survey. Without their active participation, this study would not have been possible.*

<sup>1</sup> [http://ec.europa.eu/public\\_opinion/index\\_en.htm](http://ec.europa.eu/public_opinion/index_en.htm)

<sup>2</sup> The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

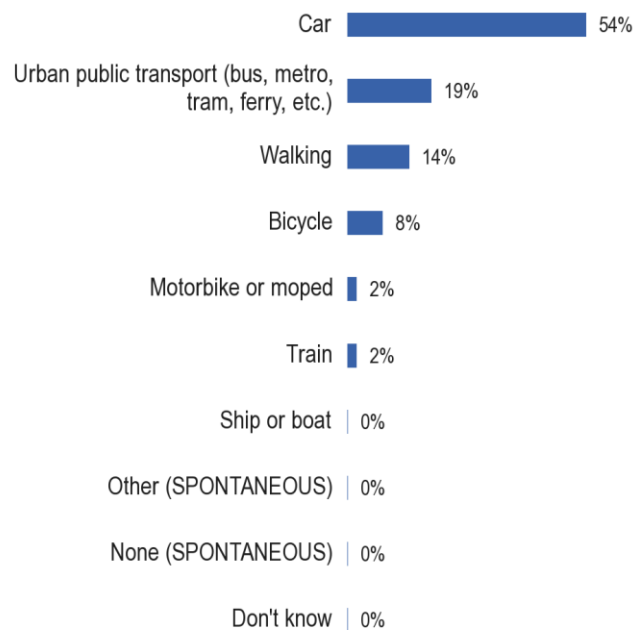
## 1. TRANSPORT HABITS FOR EVERYDAY JOURNEYS

### 1.1. THE MOST FREQUENTLY USED MODES OF TRANSPORT

#### - On a typical day, cars were by far the most used mode of transport -

Respondents were asked what kind of transport they used most often on a typical day<sup>3</sup>. Cars were by far the most used mode of daily transport (54%) followed by urban public transport (19%), while walking was the third most common mode of daily transport (14%).

QA1. On a typical day, which mode of transport do you use most often?



EU28

**Car** was the most mentioned transport mode in each Member State. In each Member State the car was the most mentioned mode of transport. More specifically, in 16 Member States at least half of all respondents said on a typical day they used a car most often. This was particularly the case for respondents in Cyprus (85%), Ireland (73%), Slovenia (71%) and Malta (70%). **Urban public transport** was most likely to be used in Latvia, but even so the figure was relatively low at 31%, followed by Poland and Romania (both 29%). In seven Member States at least one in five respondents said **walking** was their most frequently used mode of transport on a typical day, and this was especially the case amongst respondents in Bulgaria, Spain (both 25%), Romania and Portugal (both 23%). Respondents in the Netherlands were the most likely to say they used a **bicycle** (36%), with bicycle use almost as common as car use (45%).

<sup>3</sup> Q1 On a typical day, which mode of transport do you use most often? (READ OUT – ROTATE – MAX TWO ANSWERS POSSIBLE) Car; Motorbike; Train; Ship or boat; Urban public transport (bus, metro, tram, ferry, etc.); Bicycle; Walking; Other (SPONTANEOUS); None (SPONTANEOUS); DK

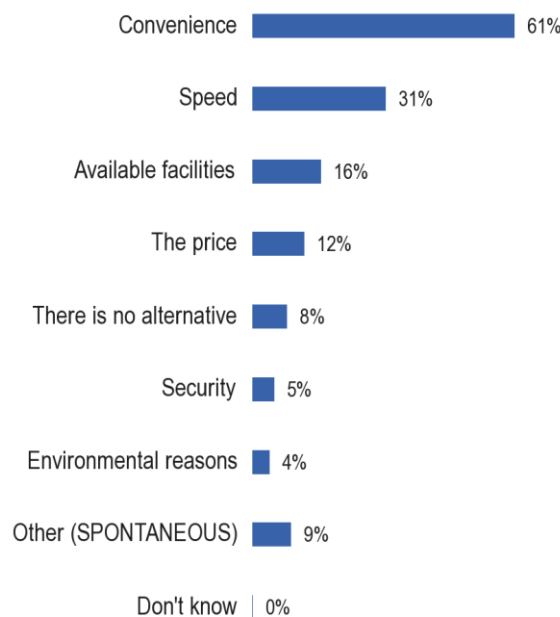


## 1.2. REASONS FOR USING DIFFERENT MODES OF TRANSPORT

### - Convenience and speed were much more important than price when choosing a mode of transport -

Respondents who used at least one mode of transport on a typical day were asked to give up to two reasons why they used that type of transport<sup>4</sup>. Convenience (61%) and speed (31%) were much more important than available facilities (16%) and price (12%) when choosing a mode of daily transport. Fewer than one in ten said they have no alternative (8%), or said their reasons were related to security (5%) or the environment (4%).

QA2. What are the reasons for using this mode of transport? (MAX. 2 ANSWERS)



EU28

Base: respondents who use a mode of transport (N=27,678)

**Convenience** was the most mentioned reason for using their chosen mode of transport in all Member States. In 21 Member States at least half of all respondents mentioned convenience, with respondents in Ireland most likely to say so (80%), followed by those in France, Luxembourg (both 78%), Italy and Cyprus (both 77%), while **speed** was most mentioned in Luxembourg (47%), France (43%) and Denmark (42%).

<sup>4</sup> Q2 What are the reasons for using this mode of transport? (ROTATE – MAX. 2 ANSWERS) Price; Environmental reasons; Safety; Convenience; Speed; Available facilities; There is no alternative; Other (SPONTANEOUS); DK

The analysis by most often used mode of transport revealed few interesting facts:

- No matter the mode of transport chosen, respondents were most likely to say they used it due to convenience – for example, 72% of car users said convenience, with speed (42%) their second most mentioned reason. Bicycle users also mentioned convenience (49%) and speed (27%) most often;
- Public transport users, on the other hand, mentioned convenience (45%) and then price (26%), closely followed by available facilities (23%);
- Price was more likely to be a reason for choice for public transport (26%), train (25%) and bicycle users (24%), particularly compared to car users (3%).

**QA2 What are the reasons for using this mode of transport? (ROTATE – MAX. 2 ANSWERS)**

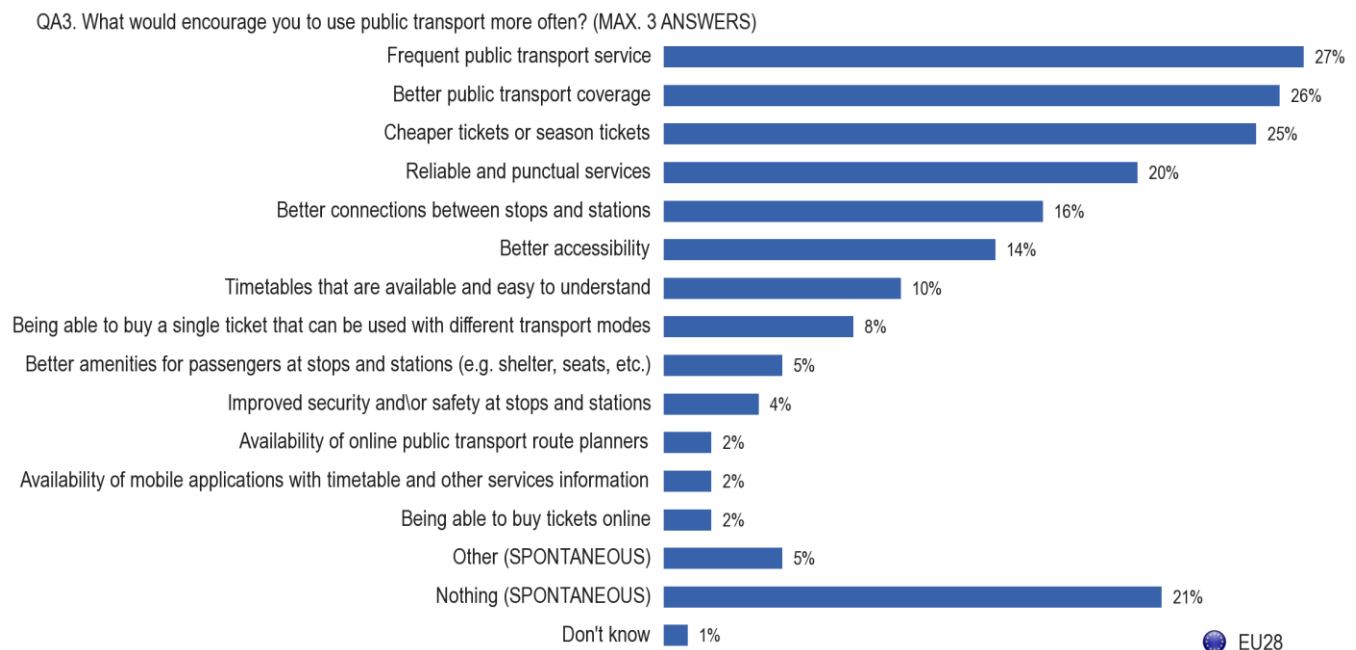
	Convenience	Speed	Available facilities	The price	There is no alternative	Security	Environmental reasons	Other (SPONTANEOUS)
EU28	61%	31%	16%	12%	8%	5%	4%	9%
<b>Most often used mode of transport</b>								
Car	72%	42%	16%	3%	6%	5%	1%	5%
Motorbike	66%	44%	4%	21%	5%	1%	2%	10%
Train	51%	28%	20%	25%	9%	4%	8%	7%
Boat	0%	53%	64%	7%	0%	0%	21%	1%
Public transport	45%	16%	23%	26%	13%	5%	5%	10%
Bicycle	49%	27%	18%	24%	5%	3%	22%	11%
Walking	48%	9%	8%	14%	12%	7%	7%	22%

Base: respondents who use a mode of transport (N=27,678)

### 1.3. WAYS OF ENCOURAGING THE USE OF PUBLIC TRANSPORT

#### - Frequent service, better coverage and cheaper or seasonal ticket options were the most likely to encourage Europeans to use public transport more often -

Respondents who used a car, motorbike or moped as their main form of transport on a typical day were asked what would encourage them to use public transport more often<sup>5</sup>. Frequent services (27%), better coverage (26%) and cheaper or seasonal ticket options (25%) were the most likely to encourage Europeans out of their cars and motorbikes and onto public transport. One in five mentioned reliable and punctual services (20%). It is worth mentioning that at least one in five said nothing would encourage them to use public transport more often (21%).



Base: respondents who use a car or a motorbike as a main of mode of transport (N=15,761)

In twelve Member States, respondents who used a car, motorbike or moped as a main mode of transport were most likely to say that **better public transport coverage** would encourage them to use public transport more often. Those in Slovenia (40%), Austria (39%) and Finland (36%) were the most likely to say this, while in seven Member States respondents were most likely to say that **frequent public transport service** would encourage them to use public transport more often, and this was particularly the case for those in Cyprus (39%), the Czech Republic (38%) and Bulgaria (35%).

<sup>5</sup> Q3 What would encourage you to use public transport more often? (ROTATE – MAX. 3 ANSWERS) Being able to buy tickets online; Being able to buy a single ticket that can be used with different transport modes; Better public transport coverage; Better connections between stops and stations; Better amenities for passengers at stops and stations (e.g. shelter, seats, etc.); Timetables that are available and easy to understand; Reliable and punctual services; Frequent public transport service; Cheaper tickets or season tickets; Availability of online public transport route planners; Availability of mobile applications with timetable and other service

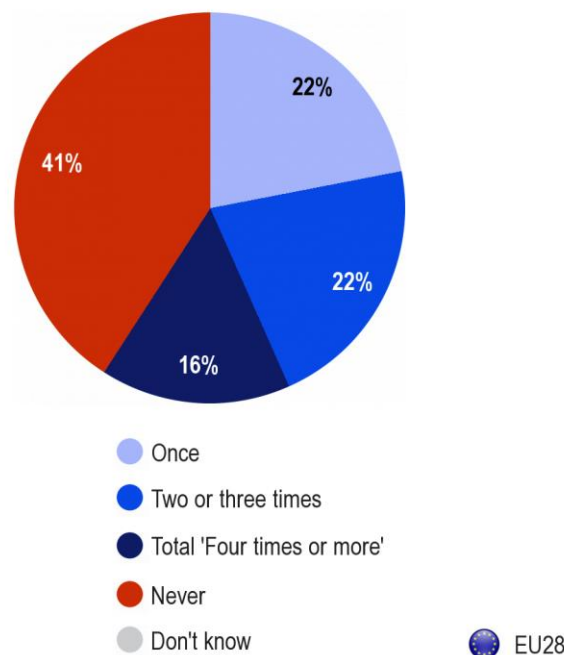
## 2. TRANSPORT HABITS WHEN MAKING LONG JOURNEYS WITHIN THE EU

### 2.1. FREQUENCY OF LONG JOURNEYS

#### - Almost six out of ten made at least one journey of 300 km or more within the EU in the last 12 months –

Respondents were asked how many times in the last 12 months they had made a journey of 300 km or more within the EU<sup>6</sup>. Just over one in five (22%) said they had made only one such journey, while a further 22% had travelled this distance two or three times. Almost as many (15%) had travelled at least 300 km within the EU four times or more in the last 12 months. However, respondents were most likely to say they had not made such a journey at all during that time period (41%).

QA4. How many times have you made journeys of 300 km or more within the EU (including (OUR COUNTRY)) in the last 12 months?



Respondents in Sweden (87%), Luxembourg (83%) and Finland (80%) were the most likely to have travelled at least 300 km within the EU in the past 12 months. In fact, those in Sweden and Finland were the most frequent travellers of this distance, with 55% and 46% respectively saying they had done so four or more times in the last 12 months.

information; Better accessibility; Improved security and/or safety at stops and stations; Nothing (SPONTANEOUS); Other (SPONTANEOUS); DK

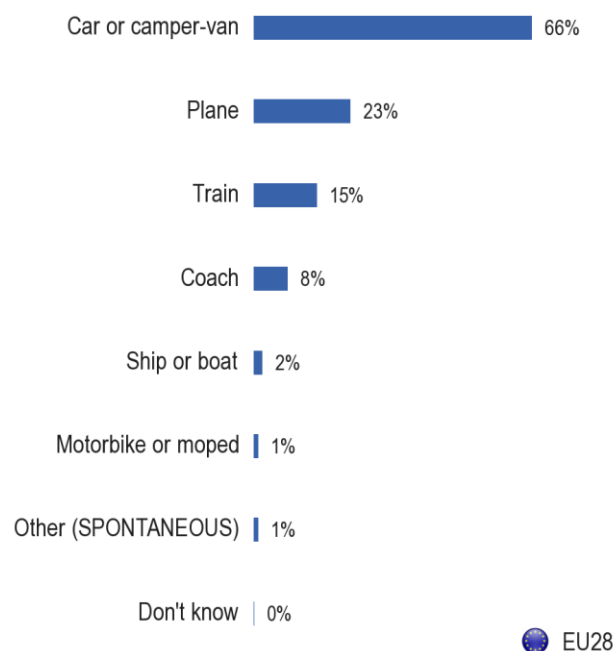
<sup>6</sup> Q4 How many times have you made journeys of 300 km or more within the EU (including (OUR COUNTRY)) in the past 12 months? None; Once; Two or three times; Four or five times; More than five times; DK

## 2.2. THE MOST FREQUENTLY USED MODES OF TRANSPORT FOR LONG JOURNEYS

### - Cars or campervans were the most popular mode of transport for journeys of at least 300 km within the EU -

Respondents who had made a journey of at least 300 km within the EU were asked what mode of transport they used for their most recent journey of this distance<sup>7</sup>. They were much more likely to have used a car or campervan (66%) than a plane (23%) or train (15%). Less than one in ten used a coach (8%), while ships, boats (2%) or motorbikes or mopeds (1%) were rarely used.

QA5. Which mode of transport did you use the last time you made a journey of 300 km or more? (MULTIPLE ANSWERS POSSIBLE)



Base: respondents who have made journeys of 300 kilometres or more during the last 12 months (N=16,471)

As was the case for everyday journeys, the **car** was the most prevalent mode of transport in all but two Member States. In these 26 Member States at least half of all the respondents who had made a journey of at least 300 km within the EU used a car or campervan, with respondents in Slovenia, Croatia (both 80%) and Portugal (75%) being the most likely to have done so. The exceptions were Cyprus (39%) and Malta (14%). In these two Member States respondents were much more likely to have used a **plane** (MT: 81%, CY: 61%). Respondents in Malta (18%) were also the most likely to have used a ship or boat, followed by those in Estonia (17%) and Greece (15%).

<sup>7</sup> Q5 Which mode of transport did you use the last time you made a journey of 300 km or more? (MULTIPLE ANSWERS POSSIBLE) Car or camper-van; Motorbike; Plane; Train; Ship or boat; Coach; Other (SPONTANEOUS); DK

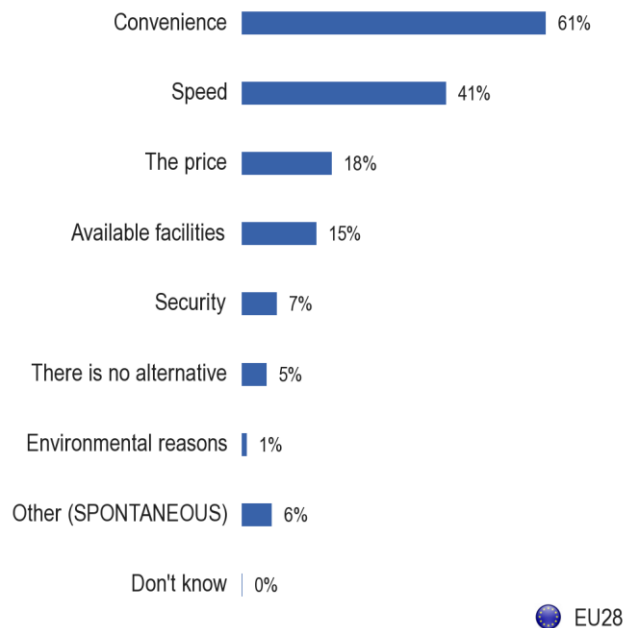
### 2.3. REASONS FOR USING THE RESPECTIVE MODES OF TRANSPORT WHEN MAKING LONG JOURNEYS

#### - Convenience was by far the most common reason for choosing a particular transport option for a journey of at least 300 km -

Just over six out of ten respondents who had made a journey of 300 km or more within the EU said that convenience was the reason they chose their particular mode of transport<sup>8</sup>. This was the only reason mentioned by at least half of all respondents. Speed was the second most mentioned reason (41%), with price a distant third (18%), closely followed by available facilities (15%). Fewer than one in ten mentioned security (7%), a lack of alternatives (5%) or environmental reasons (1%).

These results further highlight the dominance of the car as across the EU, as the majority of all respondents also used a car most often for their daily transport (54%).

QA6. What are the reasons for using this mode or these modes of transport? (MAX. 2 ANSWERS)



Base: respondents who have made journeys of 300 kilometreskilometres or more during the last 12 months (N=16,471)

**Convenience** was the most mentioned reason for using their mode of transport by respondents in all but two Member States. At least half of all respondents in 24 Member States cited convenience as their reason for choosing a particular mode of transport for a journey of 300 km or more within the EU. Convenience was most likely to be mentioned by respondents in Bulgaria (79%), Lithuania (77%), Ireland (74%) and Croatia (73%). Respondents in Slovakia (59%) and Germany (45%) were most likely to give **speed** as the reason for their choice of transport.

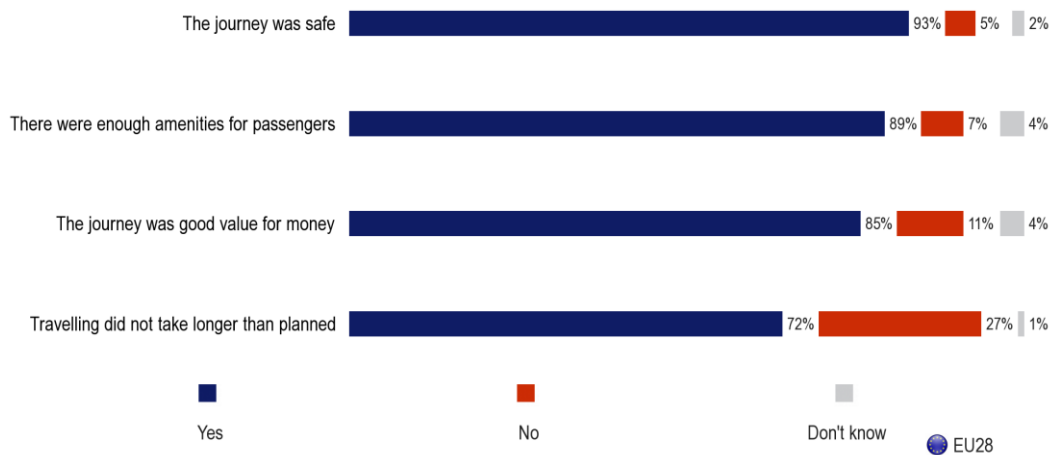
## 2.4. SATISFACTION WITH DIFFERENT ASPECTS OF LONG JOURNEYS

### - Most respondents were satisfied with the safety, amenities, value and time taken for their long journey -

Respondents were asked about several aspects of their most recent journey of 300 km or more within the EU in the last 12 months<sup>9</sup>.

More than nine out of ten said the journey was safe (93%), while 89% said there were enough amenities for passengers and 85% said their journey was good value for money. Respondents were least likely to agree that travelling did not take longer than planned, although this still represented almost three quarters of respondents (72%).

QA7. Which of the following applies to the last journey you made of 300 km or more?



Base: respondents who have made journeys of 300 kilometres or more during the last 12 months (N=16,471)

<sup>8</sup> Q6 What are the reasons for using this mode or these modes of transport? (ROTATE – MAX. 2 ANSWERS) Price; Environmental reasons; Safety; Convenience; Speed; Available facilities; There is no alternative; Other (SPONTANEOUS); DK

<sup>9</sup> Q7 Which of the following applies to the last journey you made of 300 km or more? (READ OUT – ONE ANSWER PER LINE): Yes / No / DK: The journey was good value for money; Travelling did not take longer than planned; There were enough amenities for passenger; The journey was safe

### 3. PERCEPTION OF THE QUALITY OF DIFFERENT MEANS OF TRANSPORT OVER RECENT YEARS

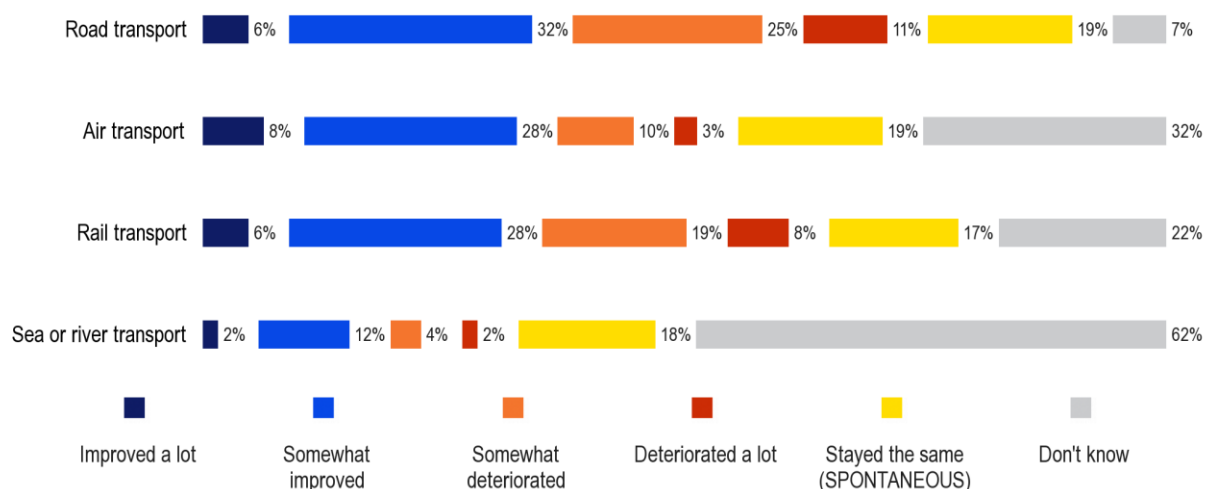
#### - At least one third said road, air and rail transport had improved in the last five years -

Respondents were divided about the quality of road transport in their country in the last five years: 38% said it had improved, while 36% thought it had deteriorated. Around one in five said the quality had remained the same (19%)<sup>10</sup>.

Respondents were more likely to be positive rather than negative about air and rail transport. In the case of air, 36% said it had improved, compared to 13% who said it had deteriorated and 19% who thought quality was the same. The difference was smaller in the case of rail transport, with 34% of the opinion it had improved and 27% that it had deteriorated.

Just over one in ten (14%) said sea or river transport in their country had improved in the last five years, while 6% said it had deteriorated. However it is worth noting that 62% were unable to give an opinion on this mode of transport.

QA8. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?



EU28

<sup>10</sup> Q8 In your opinion, has the quality of the following means of transport (services, connections, infrastructures etc.) improved, or deteriorated in (OUR COUNTRY) in the last 5 years? (SHOW CARD WITH SCALE - ONE ANSWER PER LINE) Air transport; DO NOT ASK IN CY AND MT Rail transport; Road transport; Sea or river transport. Improved a lot; Somewhat improved; Somewhat deteriorated; Deteriorated a lot; Stayed the same (SPONTANEOUS) .



## 4. ROAD TRANSPORT

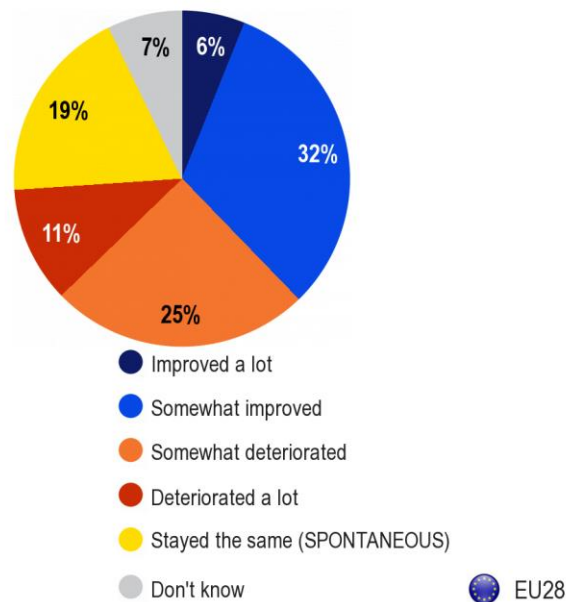
### 4.1. PERCEPTIONS OF THE QUALITY OF ROAD TRANSPORT

#### - Opinion is divided over whether the quality of road transport has improved or deteriorated in the last five years -

As shown in the previous section, almost four out of ten respondents said the quality of road transport had improved over the last five years (38%), although almost the same proportion said it had deteriorated (36%). In fact 11% said road transport in their country had deteriorated a lot. Around one in five (19%) said the quality of road transport has remained the same in the last five years.

QA8.3. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?

Road transport



There were only ten Member States where a majority of respondents said the quality of road transport had improved in the last five years, with the most positive respondents found in Cyprus (70%), Ireland and Croatia (both 69%).

The analysis by most often used mode of transport revealed few interesting facts:

- Respondents who most often use cars on a typical day were less likely than those who used public transport to say road transport had improved (38% vs. 43%);
- However, car users were more likely than those who used motorbikes to say road transport had improved (38% vs. 30%). Public transport users, on the other hand, were more likely to say road transport had improved (43% vs. 30%).

**QA8.3 In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?**

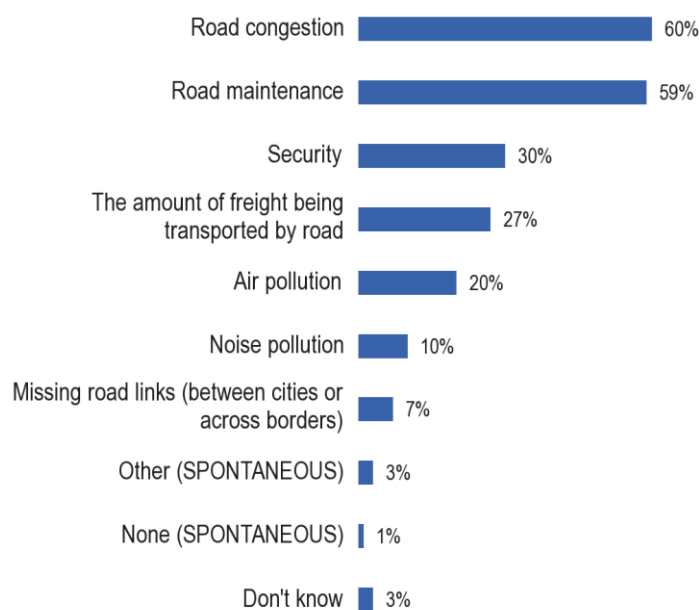
Road transport				
	Total 'Improved'	Total 'Deteriorated'	Stayed the same (SPONTANEOUS)	Don't know
EU28	38%	36%	19%	7%
Most often used mode of transport				
Car	38%	40%	18%	4%
Motorbike	30%	38%	25%	7%
Train	37%	37%	20%	6%
Boat	6%	94%	0%	0%
Public transport	43%	30%	19%	8%
Bicycle	38%	36%	19%	7%
Walking	36%	32%	19%	13%

## 4.2. THE MOST SERIOUS PROBLEMS AFFECTING ROADS

### - The majority agreed congestion and maintenance are the most serious problems for roads -

Six out of ten respondents said congestion was the most serious problem for roads in their country (60%), while almost as many (59%) mentioned road maintenance<sup>11</sup>. Around three in ten mentioned security (30%) or the amount of freight being transported (27%). Air (20%) and noise pollution (10%) were mentioned by fewer respondents, as were missing road links (7%).

QA13. Which of the following do you think are the most serious problems affecting roads in (OUR COUNTRY)? (MAX. 3 ANSWERS)



EU28

At least eight out of ten respondents in Luxembourg (86%), Malta (82%) and Germany (81%) said **road congestion** was the most serious problem for roads in their country, and overall at least half of all respondents in 16 Member States mentioned congestion while in 23 Member States at least half of all respondents said **road maintenance** was the most serious problem for roads, with those in Bulgaria, Latvia (both 83%) and Slovenia (80%) the most likely to say this.

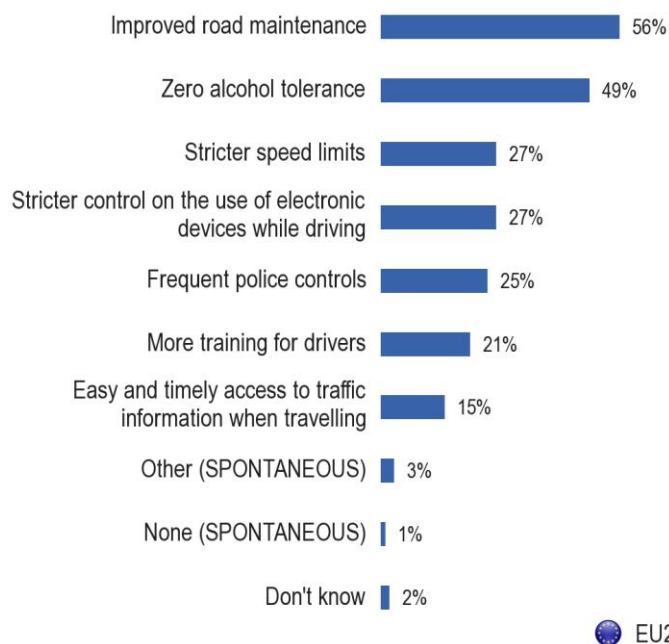
<sup>11</sup> Q13 Which of the following do you think are the most serious problems affecting roads in (OUR COUNTRY)? (ROTATE – MAX. 3 ANSWERS) Road congestion; Noise pollution; Air pollution; Safety; Missing road links (between cities or across borders); Road maintenance; The amount of freight being transported by road; Others (SPONTANEOUS); None (SPONTANEOUS); DK

### 4.3. PRIORITIES FOR IMPROVING SAFETY ON ROADS

#### - Improved maintenance should be the priority for improving road safety -

More than half of all respondents said improving road maintenance should be the priority for improving safety on roads, although almost as many mentioned zero alcohol tolerance (49%)<sup>12</sup>. Stricter speed limits and stricter controls on the use of electronic devices were less likely to be mentioned (both 27%), as were frequent police controls (25%) and more driver training (21%). More than one in ten also mentioned easy and timely access to traffic information when travelling.

QA14. Which of the following do you think should be the priorities for improving safety on roads in (OUR COUNTRY)? (MAX. 3 ANSWERS)



There is a wide variation across the EU in the proportions who said **improved road maintenance** should be the priority for improving safety on roads, although this was the most mentioned priority in 17 Member States. At least three quarters of respondents in Latvia (79%), Slovenia (78%), the Czech Republic and Slovakia (77%) said this should be the priority, compared to 23% of those in the Netherlands and 15% in Luxembourg.

<sup>12</sup> Q14 Which of the following do you think should be the priorities for improving safety on roads? (READ OUT – ROTATE - MAX 3 ANSWERS) More training for drivers; Stricter speed limits; Stricter control on the use of electronic devices while driving; Easy and timely access to traffic information when travelling; Zero alcohol tolerance; Frequent police controls; Improved road maintenance; Other (SPONTANEOUS); None (SPONTANEOUS); DK

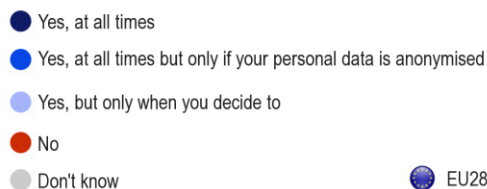
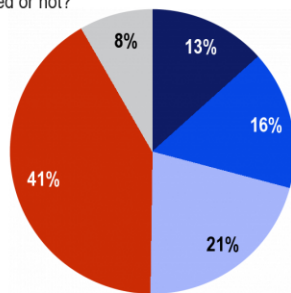
#### 4.4. GENERAL ATTITUDES ABOUT ONLINE AVAILABILITY OF THE VEHICLE'S LOCATION

##### - A majority of respondents (51%) would be willing to have their vehicle connected online, but for most this would be conditional -

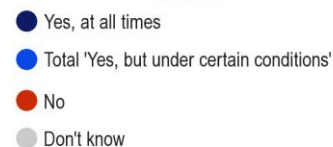
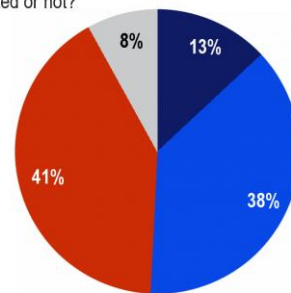
Connected vehicles would allow for better traffic management and safer, easier journeys, but would mean a vehicle's location would be available online.

Just over half (51%) would be willing to have a connected vehicle, but for most this would be conditional: 13% would be willing to have their vehicle connected at all times, and a further 16% would be willing to have their vehicle connected at all times if their personal data was anonymised, while 21% would be willing to connect their vehicle only when they decide to. In total 38% would be willing to connect their vehicles only under certain conditions. However, respondents were most likely to say that they would not be willing to connect their vehicle (41%).

QA15. With today's technology, vehicles can be connected at all times. On the one hand this would allow a better traffic management and should make the journey easier and safer. On the other hand, it means that the vehicle's location would be available online. Would you agree to have your vehicle connected or not?



QA15. With today's technology, vehicles can be connected at all times. On the one hand this would allow a better traffic management and should make the journey easier and safer. On the other hand, it means that the vehicle's location would be available online. Would you agree to have your vehicle connected or not?



Overall, respondents in Sweden (75%) and Denmark (72%) were the most likely to agree to have their vehicle connected (either conditionally or unconditionally), and this was the case for at least half of all respondents in 16 Member States.

## 5. AIR TRANSPORT

### 5.1. PERCEPTIONS OF THE QUALITY OF AIR TRANSPORT

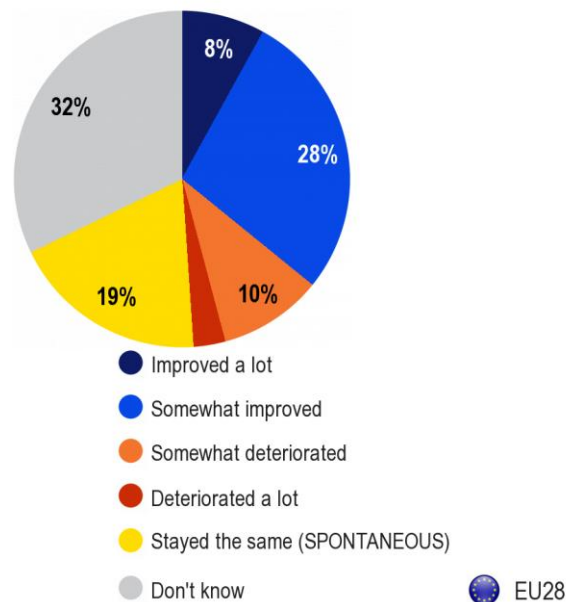
**- A majority of respondents (55%) said the quality of air transport in their country has improved or stayed the same in the last five years -**

Respondents were most likely to say that the quality of air transport in their country has improved in the last five years (36%), although the proportion was only slightly higher than those who did not know (32%). Respondents were more likely to say that quality had 'somewhat improved' (28%) than they were to say it had 'improved a lot'.

Almost one in five said quality had remained the same (19%), while 13% said the quality of air transport in their country had deteriorated over the last five years.

QA8.1. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?

Air transport



Respondents in all Member States were more likely to be positive rather than negative about the quality of air transport in their country. There were only five Member States where the majority of respondents said the quality of air transport had improved in the last five years: Ireland (65%), Greece (61%), Cyprus, Malta (both 59%) and Croatia (51%).

The analysis by most often used mode of transport revealed that respondents who used a plane for a journey of 300 km or more within the EU in the last 12 months were more likely than those who used another mode of transport to say that air transport had improved (57% vs. 37%-53%).

**QA8.1 In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?**

**Air transport**

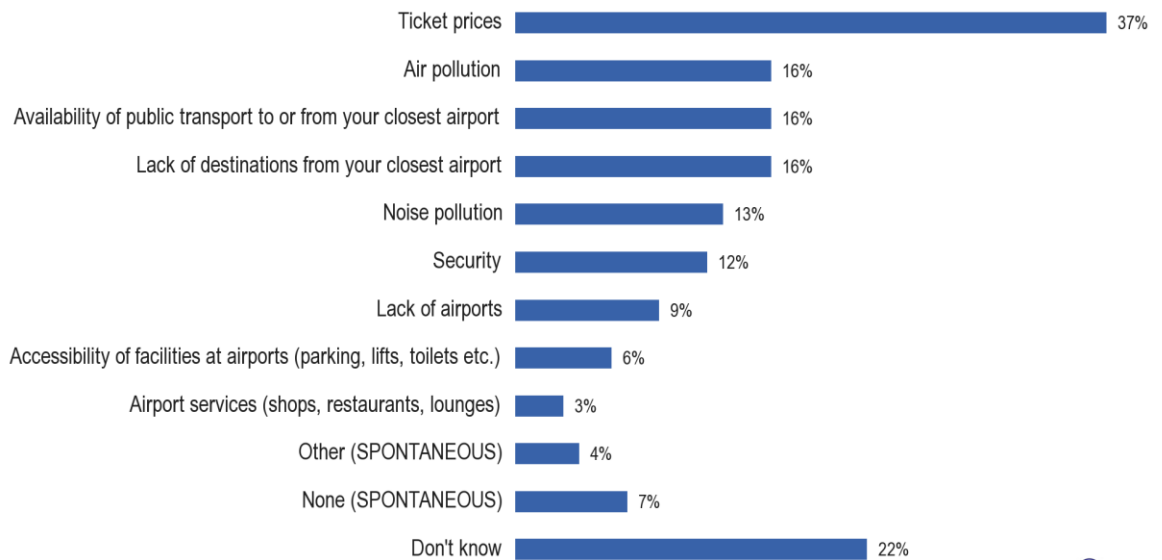
	Total 'Improved'	Total 'Deteriorated'	Stayed the same (SPONTANEOUS)	Don't know
EU28	36%	13%	19%	32%
<b>Mode of transport used for a journey of 300km or more</b>				
Car	40%	14%	19%	27%
Motorbike	45%	19%	14%	22%
Plane	57%	15%	22%	6%
Train	37%	13%	20%	30%
Boat	53%	8%	24%	15%
Coach	37%	11%	18%	34%

## 5.2. THE MOST SERIOUS PROBLEMS AFFECTING AIR TRANSPORT

### - Ticket prices were most likely to be considered the most serious problem for air transport -

Ticket prices were most likely to be considered the most serious problem for air transport (37% vs. 3%-16% for the other items), although the second most common answer was actually that they did not know (22%)<sup>13</sup>. Air pollution, lack of destinations from the closest airport, or availability of public transport to and from that airport were the next most mentioned problems (all 16%). In contrast, few respondents said airport services (3%), or the accessibility of facilities at airports (6%) were the most serious problems.

QA10. Which of the following do you think are the most serious problems affecting air transport in (OUR COUNTRY)? (MAX. 3 ANSWERS)



EU28

Cyprus (74%), Greece (66%), Croatia (54%), Spain (51%) and the Czech Republic (50%) were the only Member States where at least half mentioned **ticket prices**, although this was the most mentioned problem with air transport in 24 Member States. This compared to less than on quarter of respondents in Sweden (23%), Denmark (22%) and Germany (21%).

<sup>13</sup> Q10 Which of the following do you think are the most serious problems affecting air transport in (OUR COUNTRY)? (READ OUT – ROTATE - MAX 3 ANSWERS POSSIBLE) Noise pollution; Air pollution; Safety; Lack of airports; Ticket prices; Accessibility of facilities at airports (parking, lifts, toilets etc.); Airport services (shops, restaurants, lounges); Lack of destinations from your closest airport; Availability of Public transport to/from your closest airport; Others (SPONTANEOUS); None (SPONTANEOUS); DK

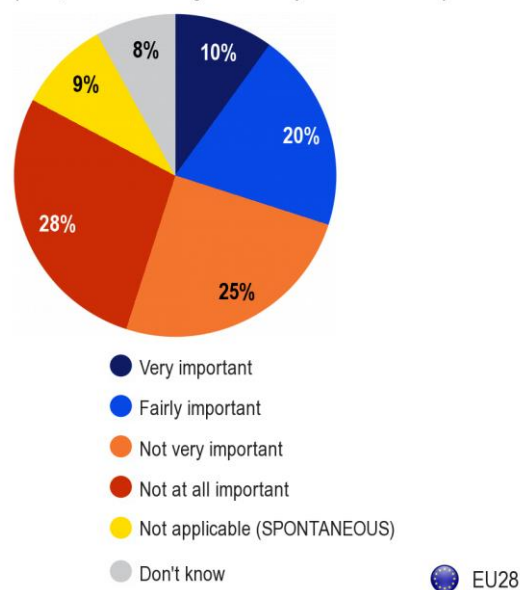


### 5.3. PERCEPTION OF THE IMPORTANCE OF THE RESTRICTION ON LIQUIDS IN HAND-LUGGAGE

#### - The majority said it wasn't important to be able to bring more liquids than the current ban allows through security and onto the plane -

Three in ten respondents said it was important to be able to bring more liquids through security than the current ban allows (30%), although just 10% said this was 'very important'<sup>14</sup>. The majority, however, said this was not important to them (53%), with 28% saying it wasn't important at all.

QA11. After a decade of the ban on liquids, how important would it be for you to be able to bring liquids above the current limit through the security checkpoints at airports, in order to bring them with you on board the plane?



Respondents who had taken a journey by plane of at least 300 km within the EU in the last 12 months were more likely than those who had not, to say it was important to them to be able to bring liquids above the current limit through security and onto the plane (41% vs. 30%).

QA11 After a decade of the ban on liquids, how important would it be for you to be able to bring liquids above the current limit through the security checkpoints at airports, in order to bring them with you on board the plane?

	Total 'Important'	Total 'Not important'	Not applicable (SPONTANEOUS)	Don't know
EU28	30%	53%	9%	8%
<b>Took the plane for a journey of 300km or more</b>				
Yes	41%	57%	1%	1%
No	30%	57%	6%	7%

<sup>14</sup> Q11 How important would it be for you to be able to bring liquids above the current limit through the security checkpoints at airports in order to bring them with you aboard the plane? (READ OUT – ONE ANSWER ONLY) Very important; Fairly important; Not very important; Not important at all; Not applicable (SPONTANEOUS); DK

## 6. RAIL TRANSPORT

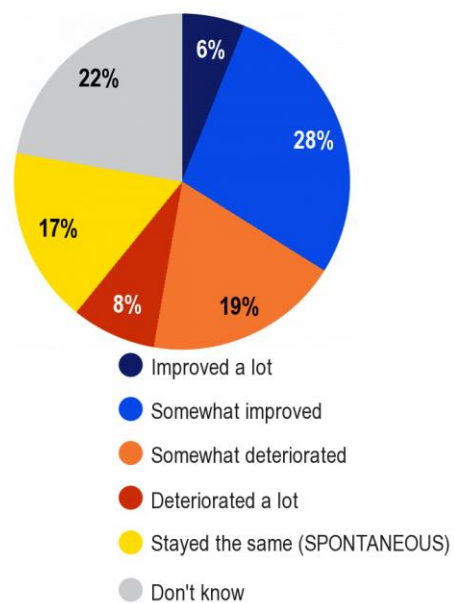
### 6.1. PERCEPTIONS OF THE QUALITY OF RAIL TRANSPORT

#### - More than one third said rail transport had improved -

Respondents were slightly more likely to be positive about the quality of rail transport in the last five years, with 34% saying it had improved and 27% saying it had deteriorated. Almost one in five said the quality had stayed the same (17%), while 22% said they did not know.

QA8.2. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?

Rail transport



Base: all respondents except MT and CY (N=26,865)

Results across the EU illustrated a wide variation between Member States. Austria (58%), Ireland (51%) and Estonia (50%) were the only countries where at least half said rail transport in their country had improved.

Respondents who used the train most often for daily transport were more likely than those using other modes to say rail transport had improved (50% vs. 29%-40%). Finally, amongst respondents who had made a journey of at least 300 km in the last 12 months, those who took the train were more likely than those who used other modes to say rail transport had improved in the last five years (51% vs. 35%-41%).

**QA8.2 In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?**

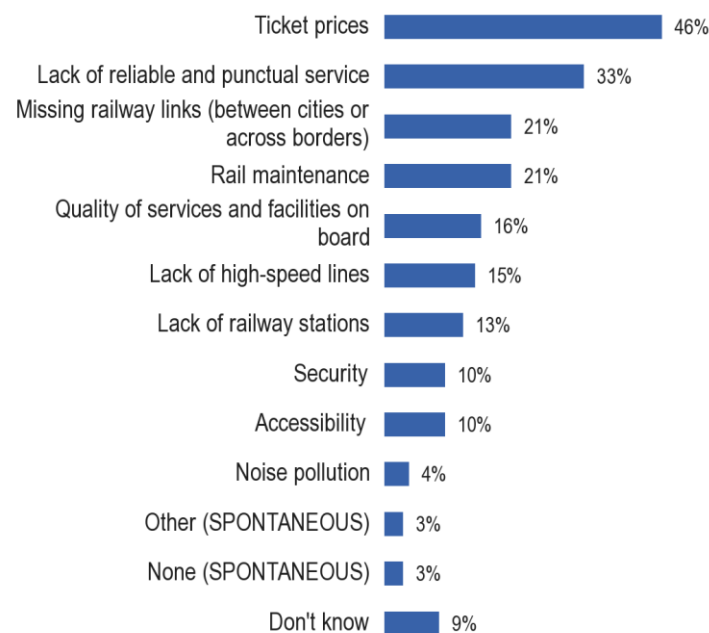
<b>Rail transport</b>				
	<b>Total 'Improved'</b>	<b>Total 'Deteriorated'</b>	<b>Stayed the same (SPONTANEOUS)</b>	<b>Don't know</b>
<b>TOTAL</b>	34%	27%	17%	22%
<b>Most often used mode of transport</b>				
Car	32%	30%	17%	21%
Motorbike	38%	25%	21%	16%
Train	50%	30%	15%	5%
Boat	54%	46%	-	-
Public transport	40%	23%	16%	21%
Bicycle	31%	30%	22%	17%
Walking	29%	24%	17%	30%
Car or motorbike	32%	29%	18%	21%
Train or urban public transport	40%	24%	16%	20%
Bicycle or walking	30%	26%	19%	25%
<b>Mode of transport used for a journey of 300km or more</b>				
Car	35%	30%	16%	19%
Motorbike	36%	39%	16%	9%
Plane	37%	26%	19%	18%
Train	51%	26%	18%	5%
Boat	41%	26%	18%	15%
Coach	37%	27%	17%	19%

## 6.2. THE MOST SERIOUS PROBLEMS AFFECTING RAIL TRANSPORT

### - As was the case for air transport, ticket prices were considered the most serious problem for rail transport -

Almost half of all respondents said ticket prices were the most serious problem for rail transport in their country (46%) – considerably higher than the proportion who mentioned the lack of reliable or punctual services (33%)<sup>15</sup>. Missing links and rail maintenance were considered serious problems by at least one in five (21%). On the other hand, accessibility and security (both 10%) and noise pollution (4%) were far less likely to be considered serious problems for rail transport.

QA9. Which of the following do you think are the most serious problems affecting rail transport in (OUR COUNTRY)? (MAX. 3 ANSWERS)



Base: all respondents except MT and CY (N=26,865)

In 13 Member States, respondents were most likely to say that **ticket prices** were the most serious problem affecting rail transport, and this was the case for at least half of all respondents in Denmark (61%), the UK (57%), France (58%), Germany (56%), and the Netherlands (55%). Belgium (56%) and Italy (49%) were the only Member States where respondents were most likely to mention the **lack of a reliable and punctual service**, although this was also widely mentioned by respondents in Sweden (64%) and Germany (54%).

<sup>15</sup> Q9 Which of the following do you think are the most serious problems affecting rail transport in (OUR COUNTRY)? (READ OUT - ROTATE - MAX 3 ANSWERS POSSIBLE) Noise pollution; Lack of high-speed lines; Lack of reliable and punctual service; Safety; Lack of rail stations; Missing railway links (between cities or across borders); Quality of services and facilities on board; Ticket prices; Accessibility; Rail maintenance; Others (SPONTANEOUS); None (SPONTANEOUS); DK. NB Not asked in CY or MT.

## 7. SEA AND RIVER TRANSPORT

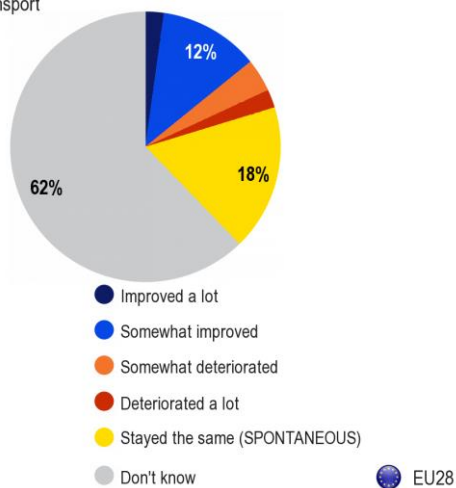
### 7.1. PERCEPTIONS OF THE QUALITY OF SEA OR RIVER TRANSPORT

**- Almost one in five said quality of sea or river transport had remained the same over the last five years -**

Fewer than one in five respondents (18%) said the quality of sea or river transport in their country had stayed the same over the last five years, while 14% said it had improved, and just 6% said it had deteriorated. However, it is important to note that the majority (62%) were unable to answer.

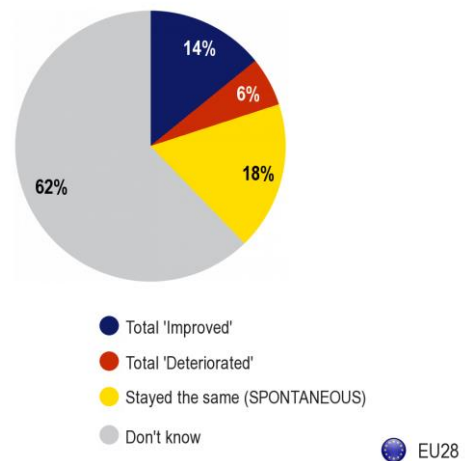
QA8.4. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?

Sea or river transport



QA8.4. In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?

Sea or river transport



In 18 Member States at least half of all respondents said they did not know whether the quality of sea or river transport had improved or deteriorated, while Malta and Greece were the only Member States where at least half said sea or river transport had improved in the last five years. Malta and Greece were the only Member States where at least half said sea or river transport had improved in the last five years (54% and 50% respectively). In fact, at least one in five respondents in Malta said it had 'improved a lot' during this time (21%).

The analysis by most often used mode of transport revealed that respondents who had taken a journey of at least 300 km by boat in the last 12 months were more likely than those who used other modes to say the quality of sea or river transport had improved (48% vs. 15%-20%).

**QA8.4 In your opinion, has the quality of the following means of transport (services, connections, infrastructures, etc.) improved or deteriorated in (OUR COUNTRY) in the last 5 years?**

**Sea or river transport**

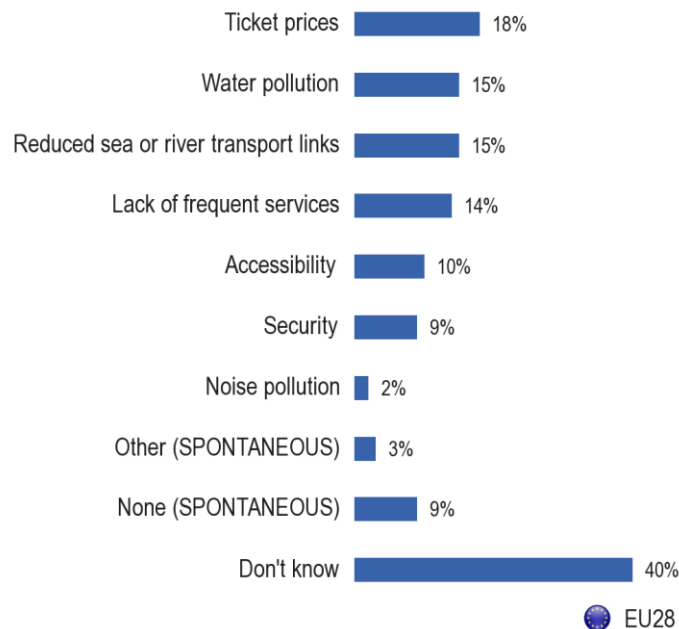
	Total 'Improved'	Total 'Deteriorated'	Stayed the same (SPONTANEOUS)	Don't know
EU28	14%	6%	18%	62%
<b>Mode of transport used for a journey of 300km or more</b>				
Car	15%	5%	18%	62%
Motorbike	20%	27%	17%	36%
Plane	18%	6%	20%	56%
Train	15%	4%	17%	64%
Boat	48%	6%	32%	14%
Coach	19%	4%	15%	62%

## 7.2. THE MOST SERIOUS PROBLEMS AFFECTING SEA OR RIVER TRANSPORT

**- Once again ticket prices were considered the most serious problem, but by far fewer than was the case for other transport modes -**

Unlike air, road and rail transport, there was relatively little variation in the proportions who think each of these issues were serious problems for sea or river transport<sup>16</sup>. Fewer than one in five mentioned ticket prices (18%) – compared to 37% for air and 46% for rail transport. Water pollution or reduced links were the next most frequently mentioned problems (both 15%). Respondents were most likely to be unable to say what the most serious problems were (40%).

QA12. Which of the following do you think are the most serious problems affecting sea or river transport in (OUR COUNTRY)? (MAX. 3 ANSWERS)



Respondents in nine Member States were most likely to say that **ticket prices** were the most serious problem for sea or river transport in their country. Greece was the only country where at least half said this (54%), followed by 41% in Cyprus and 39% in Croatia. In another nine Member states **water pollution** was the most mentioned problem, particularly by those in Finland (36%), Sweden (27%) and Belgium (21%).

<sup>16</sup> Q12 Which of Among the following, what do you think are the most serious problems affecting maritime sea or river transport in (OUR COUNTRY)? (READ OUT – ROTATE - MAX 3 ANSWERS POSSIBLE) Noise pollution; Water pollution; Safety; Reduced links of sea or river transport links; Ticket prices; Lack of frequent services; Accessibility; Others (SPONTANEOUS); None (SPONTANEOUS); DK

## 8. SUGGESTIONS FOR MAKING THE TRANSPORT SECTOR MORE ATTRACTIVE TO JOB SEEKERS

### - Higher wages and better working conditions would make transport jobs more attractive to job seekers -

When asked what would make transport sector jobs more attractive, respondents were most likely to mention higher wages (41%) or better working conditions (26%), although around one in five mentioned most of the other suggested strategies<sup>17</sup>. A small proportion (2%) said nothing could be done to make the sector more attractive for job seekers.

QA16. Although the transport sector offers jobs in Europe for people with different qualifications such as engineers, drivers or pilots, construction workers, commercial profiles, etc. it remains unattractive for many people. In your opinion, what needs to be done to make transport a more attractive sector for job seekers? (MAX. 2 ANSWERS)



At least half of all respondents in 14 Member States said that **higher wages** would make the transport sector more attractive. This was particularly the case amongst respondents in Slovakia (72%), Bulgaria (70%) and Lithuania (69%).

<sup>17</sup> Q16 Although the transport sector offers jobs in Europe for people with different qualifications such as engineers, drivers or pilots, construction workers, commercial profiles etc. it remains unattractive for many people. In your opinion, what needs to be done to make transport a more attractive sector for job seekers? (READ OUT – ROTATE – MAX 2 ANSWERS) Better working conditions; Higher salaries; Information campaigns to inform the public about possibilities; Increased security in the workplace; Better career prospects; More training and qualifications; Other (SPONTANEOUS); DK



## CONCLUSIONS

This survey highlighted the dominance of the car as the preferred mode of transport for both daily and longer trips, particularly for those living in central areas of the EU. Those in Eastern Member States were the most likely to use urban public transport or to walk as a daily travel option, although the car was still the dominant choice in these countries as well.

Opinion was divided about the quality of road transport, with almost equal proportions saying it had improved or deteriorated. Interestingly, road users were less likely to be positive about the quality of road transport than public transport users. However, whatever the opinion on quality, most considered congestion and maintenance to be the most serious problems affecting roads. Improving road maintenance was cited as the top priority for improving road safety, although there was also widespread support for zero alcohol tolerance. One plan to combat congestion is to have vehicles connected online to allow for better traffic management and advice; however, this proposal does not have widespread support, with just over one in ten willing to have their vehicles connected unconditionally.

Most respondents felt the quality of air transport had improved or remained the same over the last five years, with air travellers more likely to think this way compared to those who had not taken a plane within the EU. The current ban on liquids over a certain amount is not a major issue: just over half said it wasn't important to them to be able to bring more liquids on board than is currently allowed. In fact, ticket prices were by far the most mentioned problem for air transport.

Ticket prices were also the most mentioned problem for rail transport, and a lack of reliable or punctual services was also widely mentioned. In spite of this most Europeans felt the quality of rail transport had improved or remained the same over the last five years.

Most respondents were unable to comment on the quality of sea or river transport, but those who gave an opinion generally thought the quality had stayed the same, or had improved. Once again ticket prices were considered to be the main problem for this form of transport, although reduced links, a lack of frequent services and water pollution were mentioned almost as often.

For both long journeys and daily travelling convenience and speed were generally more likely than price to be key reasons for choosing a particular mode of transport. Public transport users were more likely to consider price over speed, although convenience was still their primary reason for choosing public transport over other modes.

Encouraging vehicle users to choose public transport will need to address factors of convenience and speed. To convince people to switch to public transport also requires a frequent service with better coverage, and cheaper or more long-term tickets. It is also important that public transport be reliable.

## **TECHNICAL SPECIFICATIONS**

## SPECIAL EUROBAROMETER 422a

### Quality of transport

### TECHNICAL SPECIFICATIONS

Between the 11<sup>th</sup> and the 20<sup>th</sup> of October 2014, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 82.2 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Strategy, Corporate Communication Actions and Eurobarometer" unit.

The Special Eurobarometer 422a is part of the wave 82.2 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over.

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed below.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

<b>Statistical Margins due to the sampling process</b>											
<b>(at the 95% level of confidence)</b>											
<i>various sample sizes are in rows</i>						<i>various observed results are in columns</i>					
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
<b>N=50</b>	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	<b>N=50</b>
<b>N=500</b>	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	<b>N=500</b>
<b>N=1000</b>	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	<b>N=1000</b>
<b>N=1500</b>	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	<b>N=1500</b>
<b>N=2000</b>	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	<b>N=2000</b>
<b>N=3000</b>	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	<b>N=3000</b>
<b>N=4000</b>	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	<b>N=4000</b>
<b>N=5000</b>	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	<b>N=5000</b>
<b>N=6000</b>	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	<b>N=6000</b>
<b>N=7000</b>	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	<b>N=7000</b>
<b>N=7500</b>	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	<b>N=7500</b>
<b>N=8000</b>	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	<b>N=8000</b>
<b>N=9000</b>	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	<b>N=9000</b>
<b>N=10000</b>	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	<b>N=10000</b>
<b>N=11000</b>	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	<b>N=11000</b>
<b>N=12000</b>	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	<b>N=12000</b>
<b>N=13000</b>	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	<b>N=13000</b>
<b>N=14000</b>	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	<b>N=14000</b>
<b>N=15000</b>	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	<b>N=15000</b>
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES		POPULATION 15+	PROPORTION EU28
				FIELDWORK			
BE	Belgium	TNS Dimarso	1.001	11/10/14	20/10/14	9.263.570	2,18%
BG	Bulgaria	TNS BBSS	1.018	11/10/14	20/10/14	6.294.563	1,48%
CZ	Czech Rep.	TNS Aisa	1.034	11/10/14	20/10/14	8.955.829	2,11%
DK	Denmark	TNS Gallup DK	1.025	11/10/14	20/10/14	4.625.032	1,09%
DE	Germany	TNS Infratest	1.532	11/10/14	20/10/14	71.283.580	16,79%
EE	Estonia	TNS Emor	1.015	11/10/14	20/10/14	1.113.355	0,26%
IE	Ireland	Behaviour & Attitudes	1.001	11/10/14	20/10/14	3.586.829	0,84%
EL	Greece	TNS ICAP	1.015	11/10/14	20/10/14	8.791.499	2,07%
ES	Spain	TNS Spain	1.011	11/10/14	20/10/14	39.506.853	9,31%
FR	France	TNS Sofres	1.011	11/10/14	20/10/14	51.668.700	12,17%
HR	Croatia	HENDAL	1.084	11/10/14	20/10/14	3.625.601	0,85%
IT	Italy	TNS Italia	1.019	11/10/14	20/10/14	51.336.889	12,09%
CY	Rep. Of Cyprus	CYMAR	500	11/10/14	18/10/14	724.084	0,17%
LV	Latvia	TNS Latvia	1.011	11/10/14	20/10/14	1.731.509	0,41%
LT	Lithuania	TNS LT	1.013	11/10/14	20/10/14	2.535.329	0,60%
LU	Luxembourg	TNS ILReS	503	11/10/14	20/10/14	445.806	0,11%
HU	Hungary	TNS Hoffmann	1.058	11/10/14	20/10/14	8.477.933	2,00%
MT	Malta	MISCO	503	11/10/14	20/10/14	360.045	0,08%
NL	Netherlands	TNS NIPO	1.059	11/10/14	20/10/14	13.901.653	3,27%
AT	Austria	ipr Umfrageforschung	1.019	11/10/14	20/10/14	7.232.497	1,70%
PL	Poland	TNS Polska	1.010	11/10/14	20/10/14	32.736.685	7,71%
PT	Portugal	TNS Portugal	1.002	11/10/14	20/10/14	8.512.269	2,01%
RO	Romania	TNS CSOP	1.015	11/10/14	20/10/14	16.880.465	3,98%
SI	Slovenia	RM PLUS	1.055	11/10/14	20/10/14	1.760.726	0,41%
SK	Slovakia	TNS Slovakia	1.038	11/10/14	20/10/14	4.580.260	1,08%
FI	Finland	TNS Gallup Oy	1.000	11/10/14	20/10/14	4.511.446	1,06%
SE	Sweden	TNS Sifo	987	11/10/14	20/10/14	7.944.034	1,87%
UK	United Kingdom	TNS UK	1.329	11/10/14	20/10/14	52.104.731	12,27%
<b>TOTAL EU28</b>			<b>27.868</b>	<b>11/10/14</b>	<b>20/10/14</b>	<b>424.491.772</b>	<b>100%*</b>

\* It should be noted that the total percentage shown in this table may exceed 100% due to rounding