

Consumer Survey on Future Mobility Options

ONLINE SURVEY-OPINION **SURVEY RUN**

PANELS

By independent
polling company **OPINIUM**



► **MID-SEPTEMBER 2019**

► **1,000** ◀

RESPONDENTS



10,000
RESPONDENTS
IN EU

ERROR MARGIN
+/- 3%

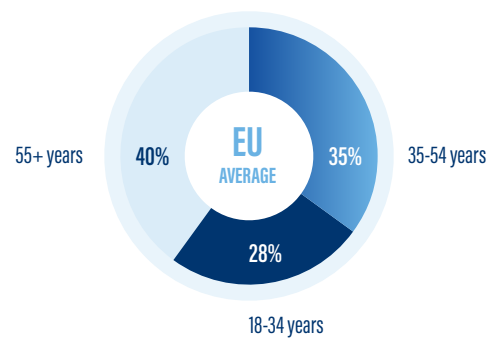
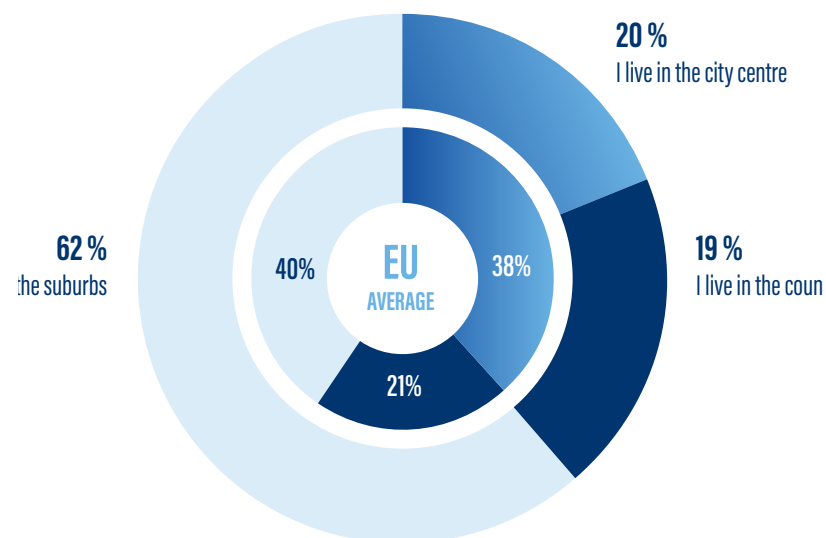
Each market = **10% of respondents**

- Male / female = **50/50**
- **10,000 respondents**
- Survey is representative of the population structure in the participating countries.

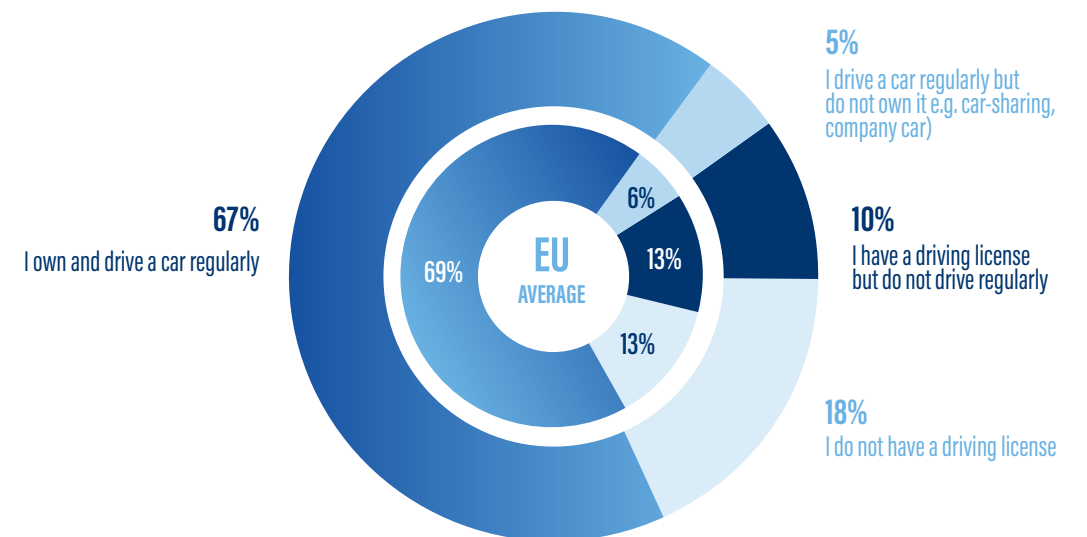
Strong reliance on cars:

- **67%** of the respondents have a car (mainly petrol and diesel fuelled)
- **75%** almost use them daily

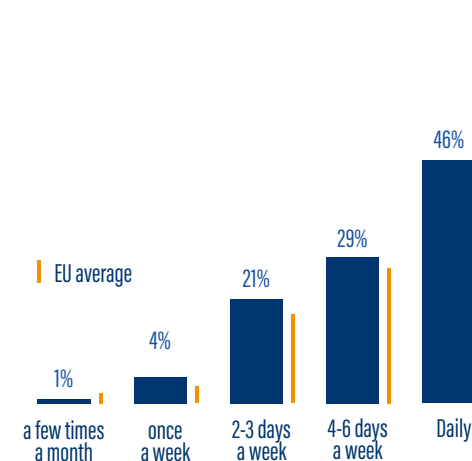
How would you best describe your area of residence?



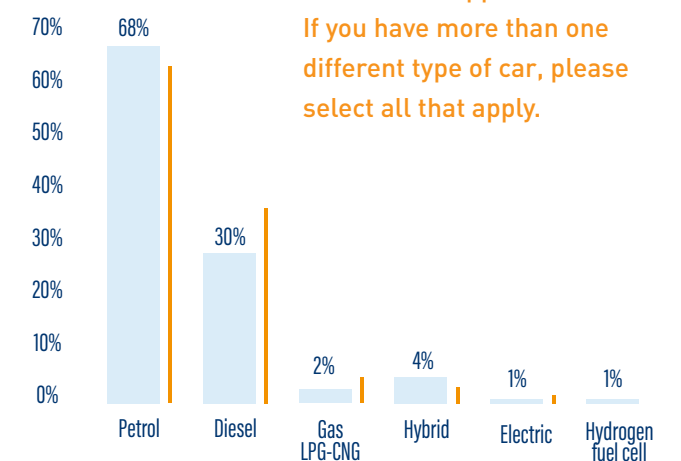
Do you currently drive a car?



How regularly do you drive your car?



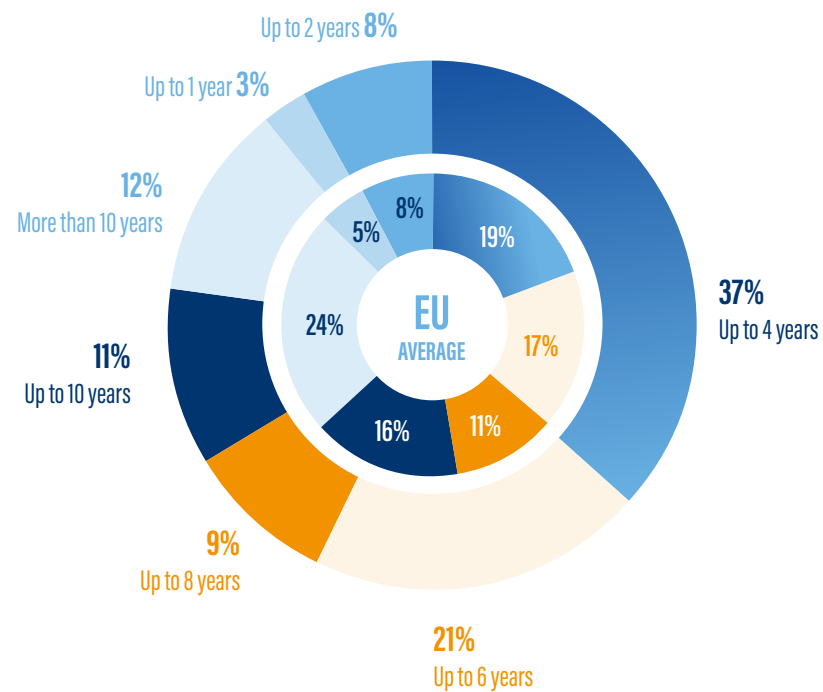
What type of car(s) do you own? If you have one car, please select the one that applies. If you have more than one different type of car, please select all that apply.



32% UK car owners keep their vehicle 8 years or more:

- 23% keep them over 10 year or more

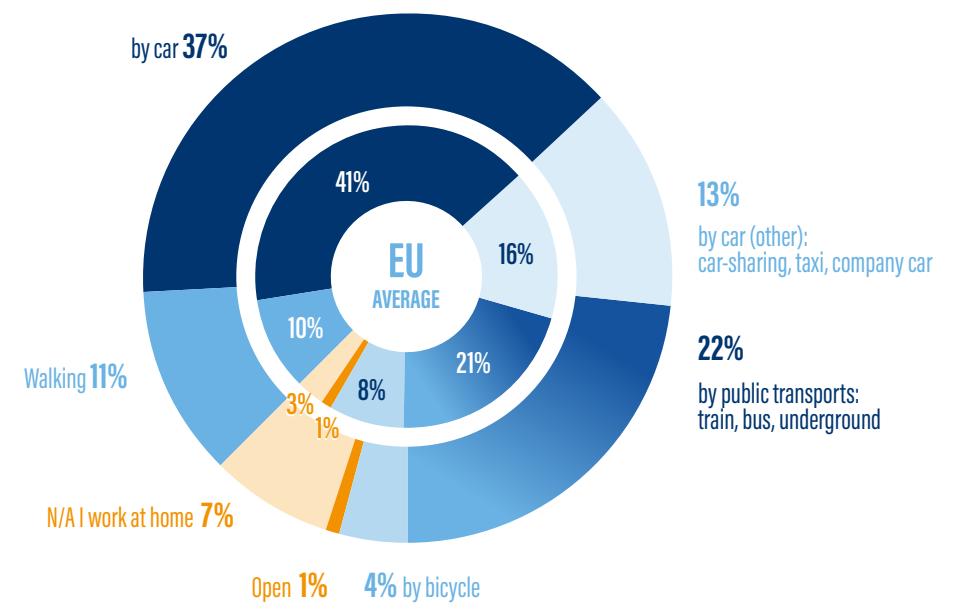
On average, how long do you keep a car before buying a new one? If you are on your first car, how long in total do you intend to keep it before buying a new one.



The car remains the principal transport mode to commute to work:

- 57% use a car to go to work
- 22% rely on public transport to commute

How do you commute to work?



How often do you use:

- Driver services / taxi: 39% never, 34% less than once a month.
- Public transport: 26% less than once a month,
- E-scooter, bicycle sharing: 90% never
- Cycling: 67% never, 10% less than once a month
- Car sharing: 84% never

Users want to have the choice over which type of car they purchase:

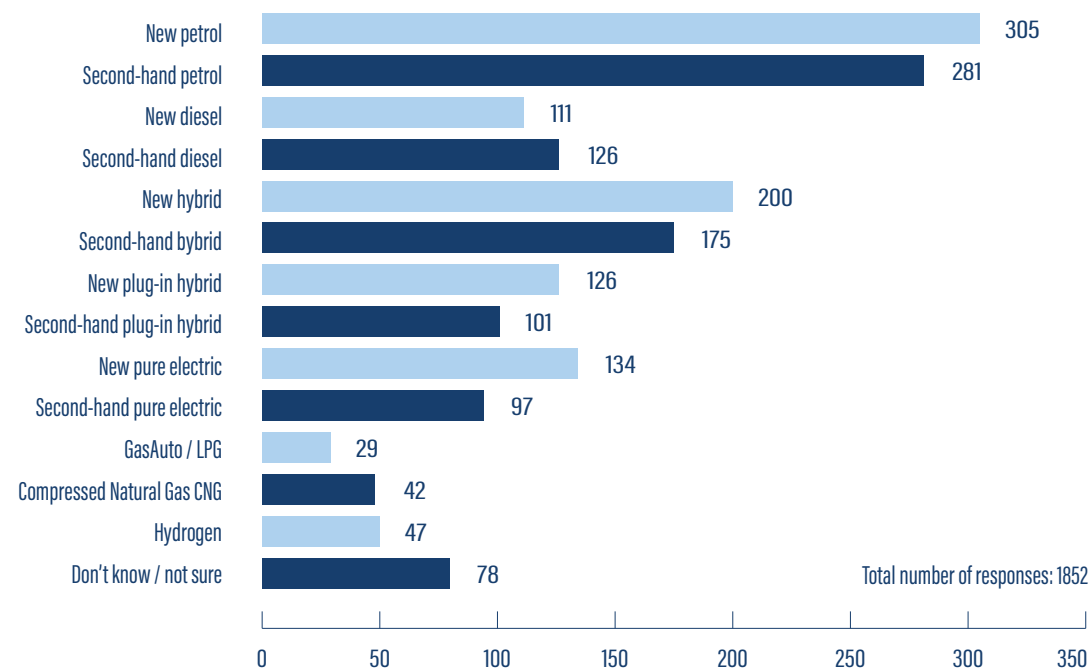
- **44%** consider buying petrol or diesel car
- **25%** are interested in EVs*

*EVs include plug-in hybrid and pure electric
Percentages were calculated on the total number on responses

Drivers should always have the choice over which type of car (e.g. diesel, gasoline, electric or other car) they use as long as the car complies with emission limits.

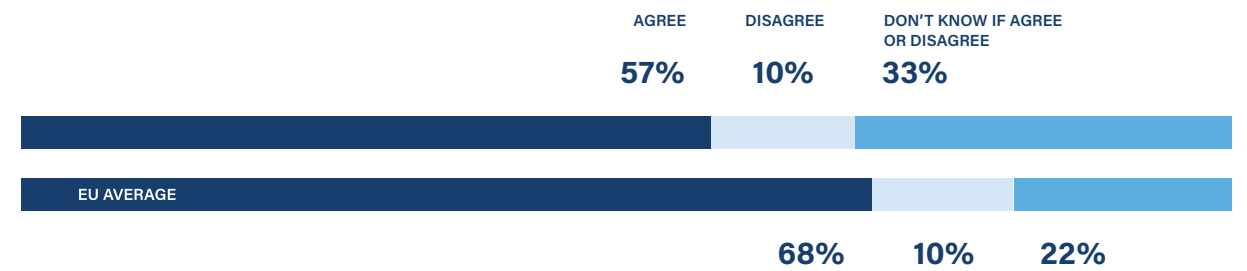


In the future, when buying a car, which of the following types would you consider?
Please select all that apply.

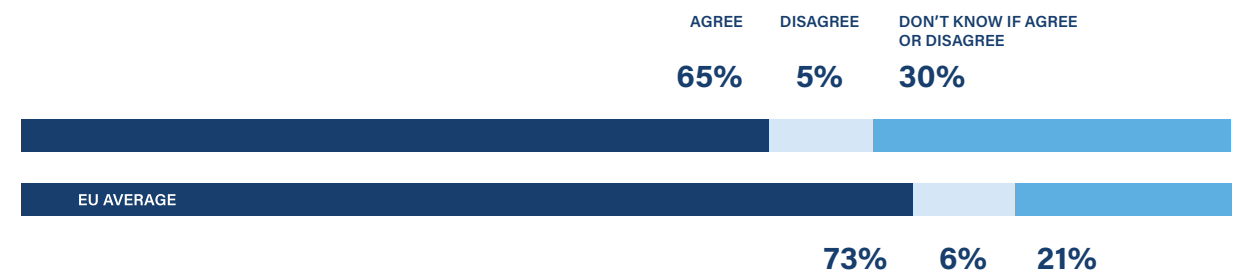


Most of the citizens demand public support for the deployment of low-carbon technologies, and ask for multiple low-carbon alternatives.

The government should do more to support the deployment of electric car.



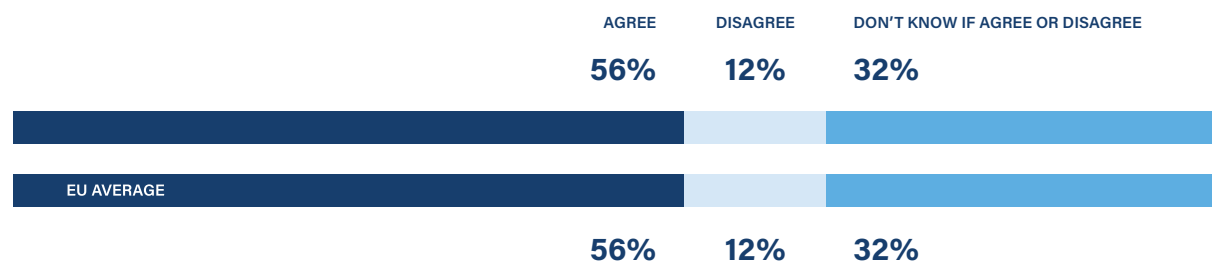
The government should do more to support the deployment of multiple low-carbon alternatives to petrol (e.g. improved liquid fuels) and not focus solely on electric to power cars.



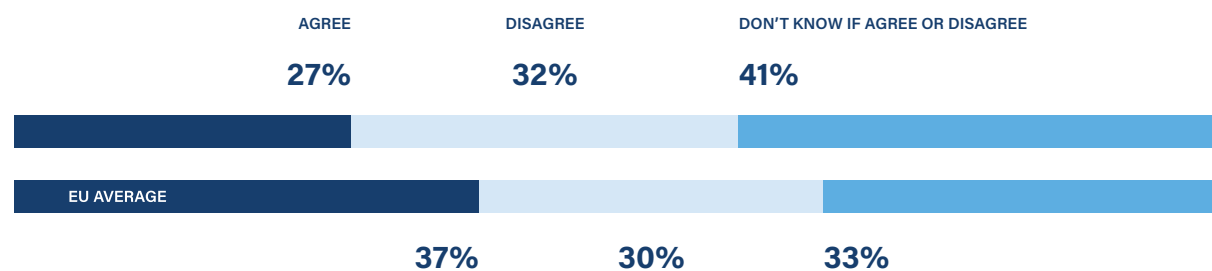
Half of EU citizens believe that the transport system will fundamentally change:

- **27%** believe that electrification is the only solution to reduce emissions
- **56%** are aware that the CO₂ footprint of electricity production impacts the sustainability of EVs

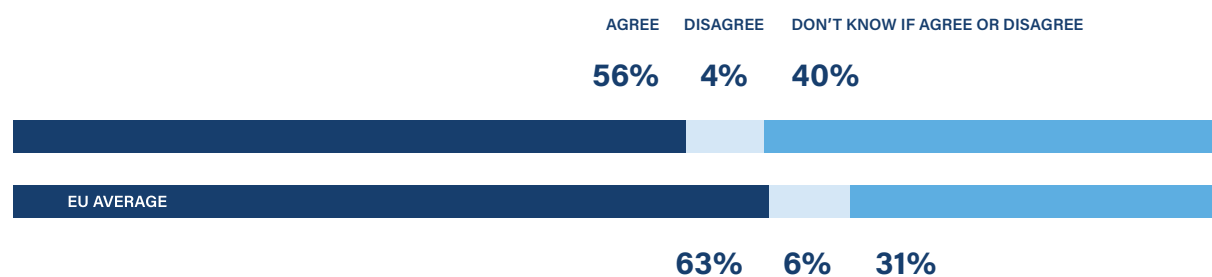
Our transport system will fundamentally change in the next decade.



Electric cars are the only solution to lower emissions in the transport sector.

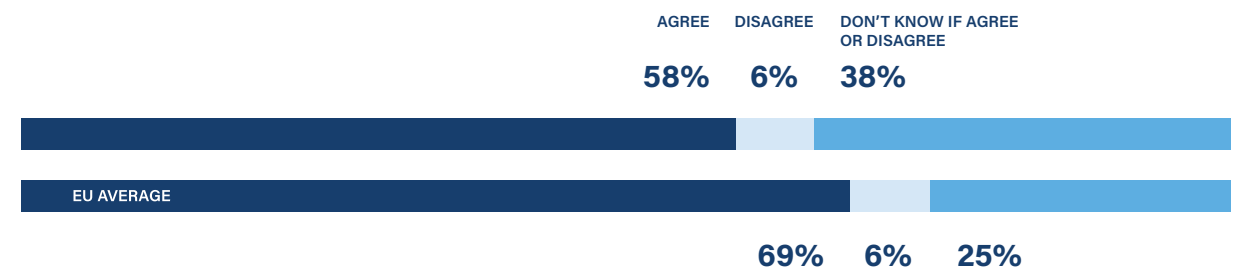


Whether or not increased use of electric vehicles reduces CO₂ emissions depends on the origin of the electricity in (e.g. whether it is from coal, natural gas, renewables, nuclear).

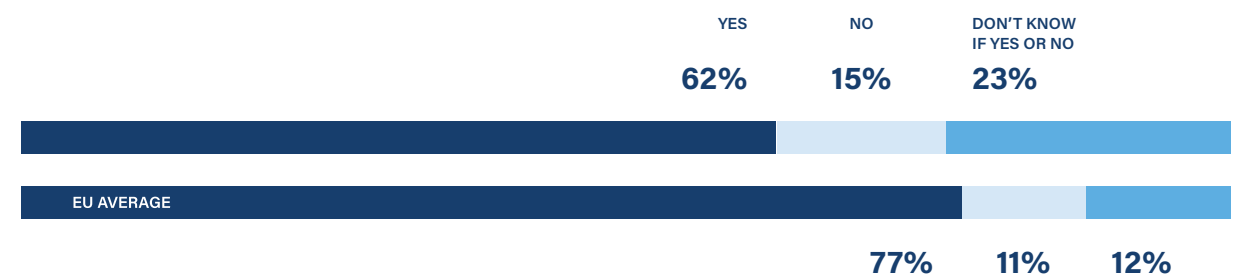


Low-carbon liquid fuels are in the opinion of citizens a real option to reduce emissions from transport, but the question of affordability is key.

Alternative fuels (biofuels, hydrogen, natural gas) could be an affordable and efficient solution to reduce emissions.

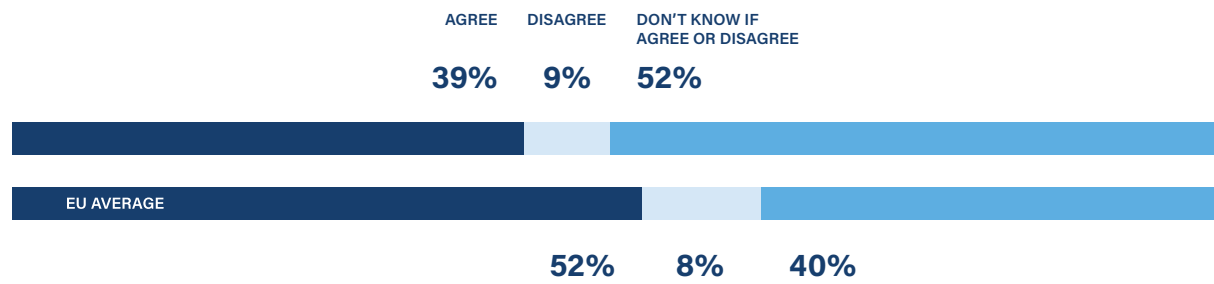


If cost and availability were not an issue, would you switch to sustainable biofuels (i.e. liquid fuel derived from plants etc) and synthetic fuels (i.e. liquid fuel obtained from syngas, a mixture of carbon monoxide and hydrogen)?

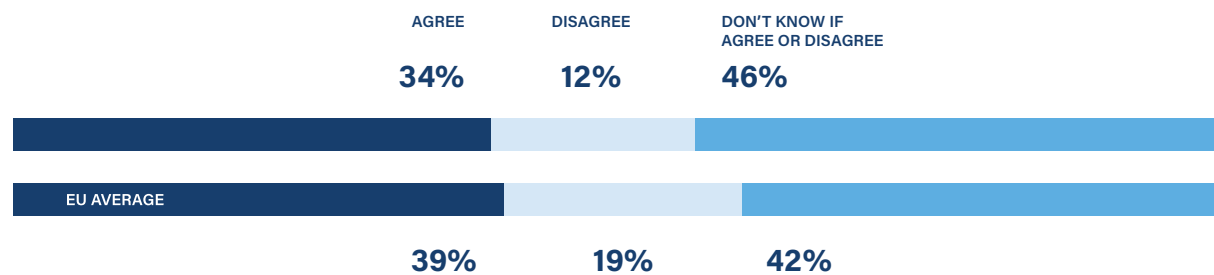


Technical uncertainty and feedstock/raw material availability remains a big concern for consumers and users.

Improved liquid fuels produced from non-petroleum sources, such as sustainable biofuels and synthetic fuels, is most likely to power our cars in 25 years.

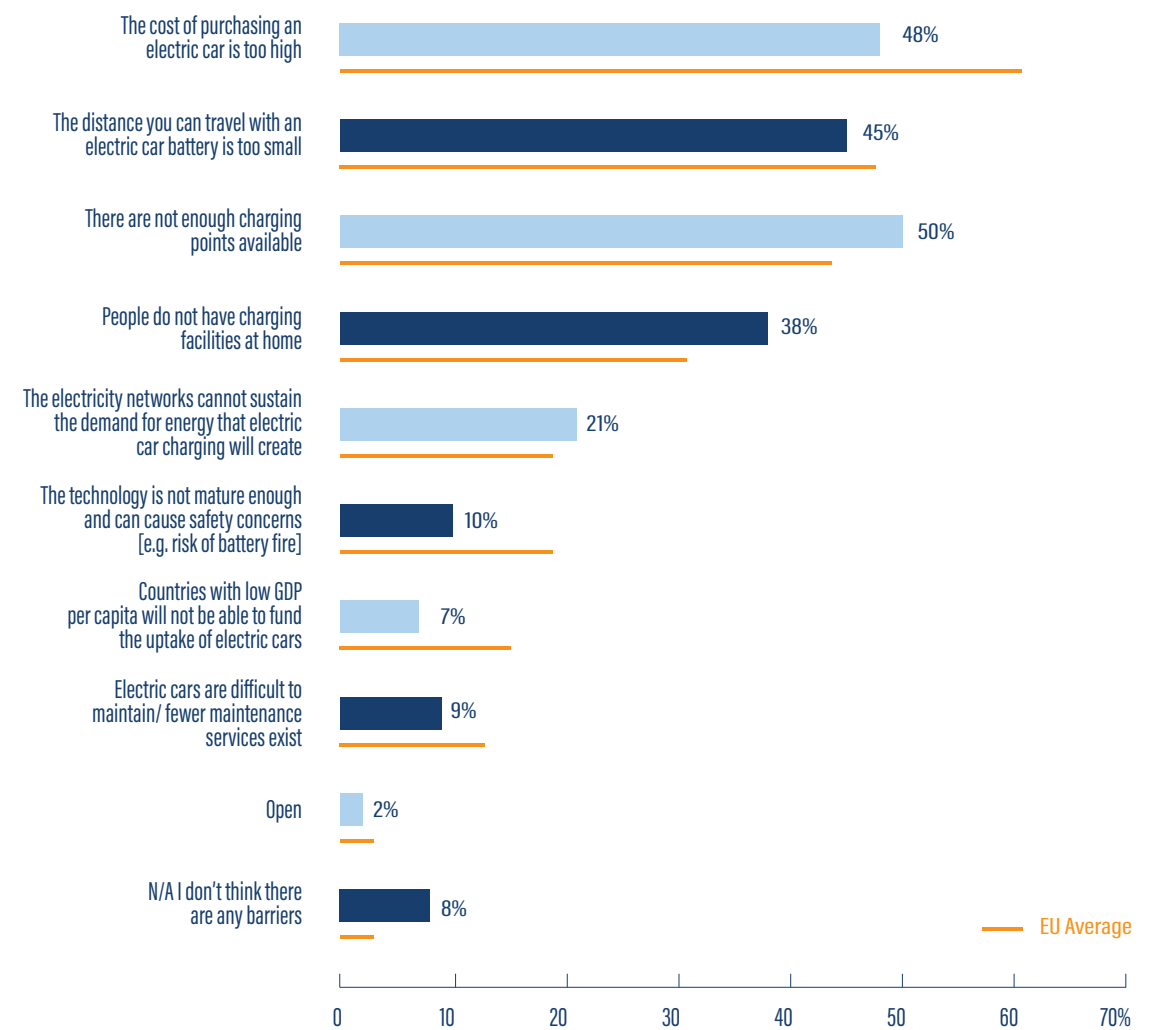


There is unlikely to be enough raw materials to manufacture and roll out a large-scale deployment of electric cars in the near future.



Cost, range and infrastructure remain the three main barriers to the uptake of electric vehicles for UK citizens.

What do you consider to be the biggest barriers to the uptake of electric cars? Please select up to three that apply.

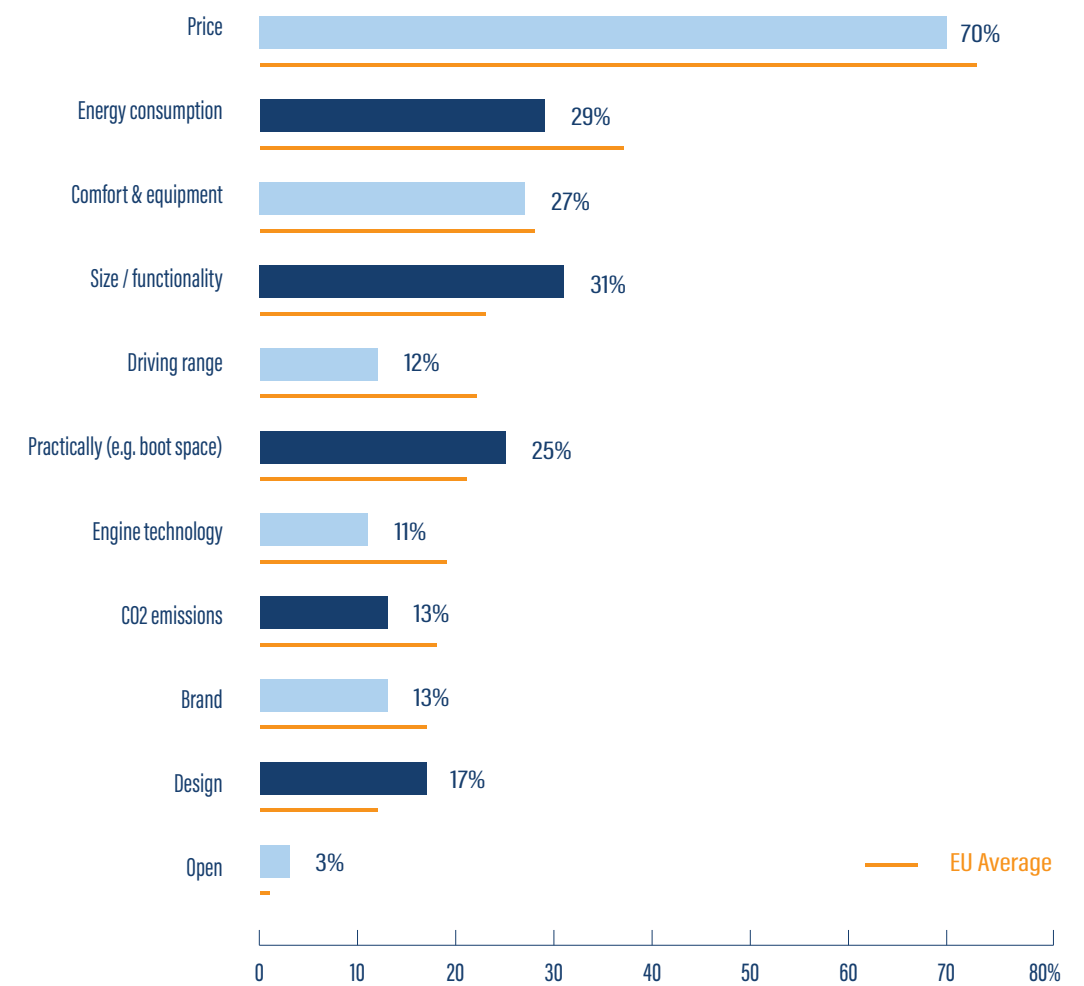
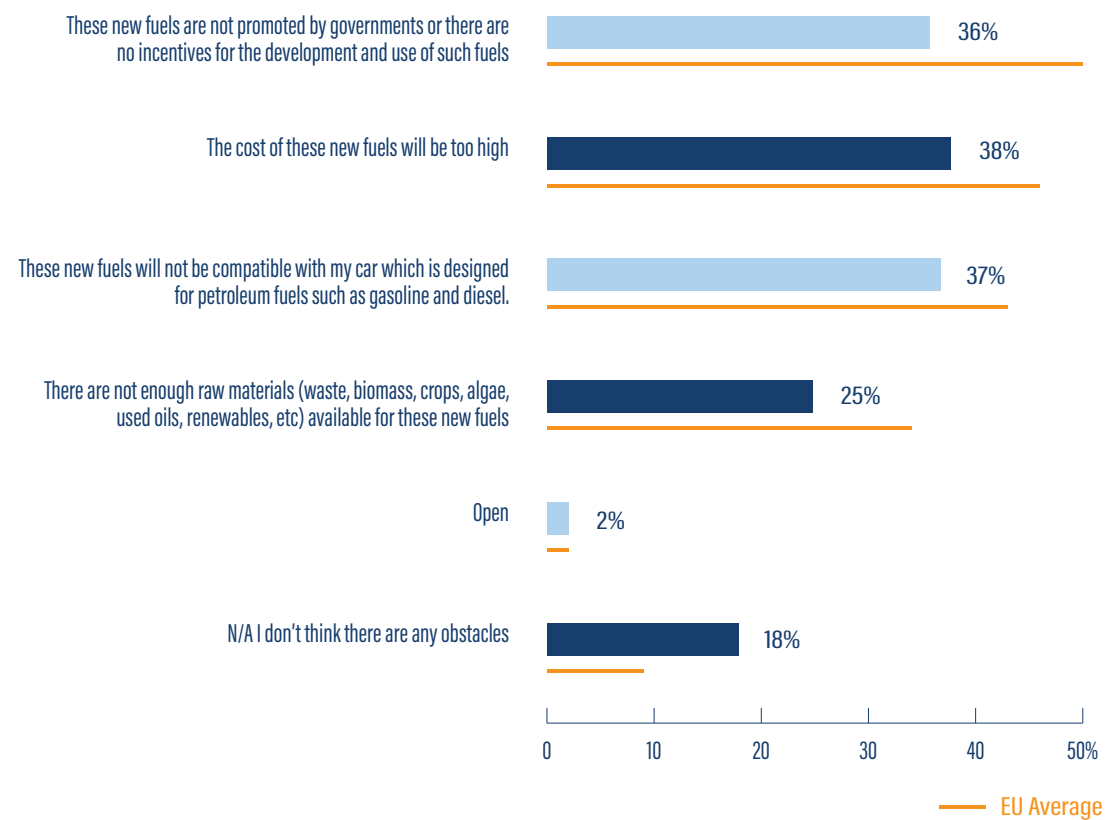


For EU citizens the lack of incentives and support by public authorities is the main obstacle to the uptake of low-carbon liquid fuels, yet cost and availability are also important barriers.

Price remains by far the main criteria for EU citizens in buying a new car.

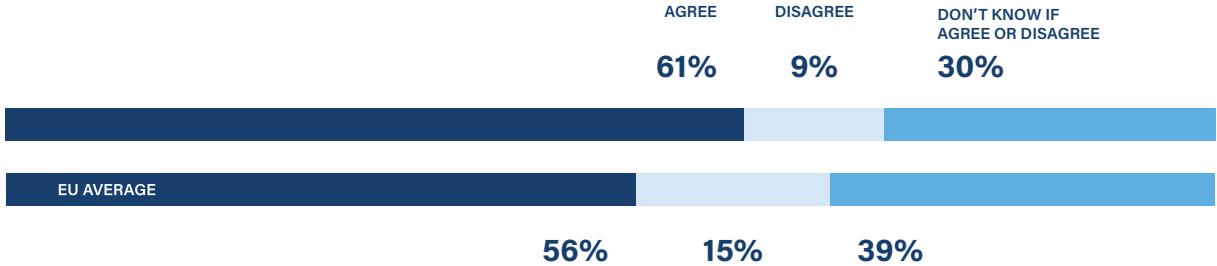
What do you consider as the biggest obstacles to the uptake of non-petroleum based liquid fuels (e.g. sustainable biofuels, synthetic fuels etc)?
Please select up to three that apply

What is the most important criteria for you in buying a new car?
Please select up to three that apply.

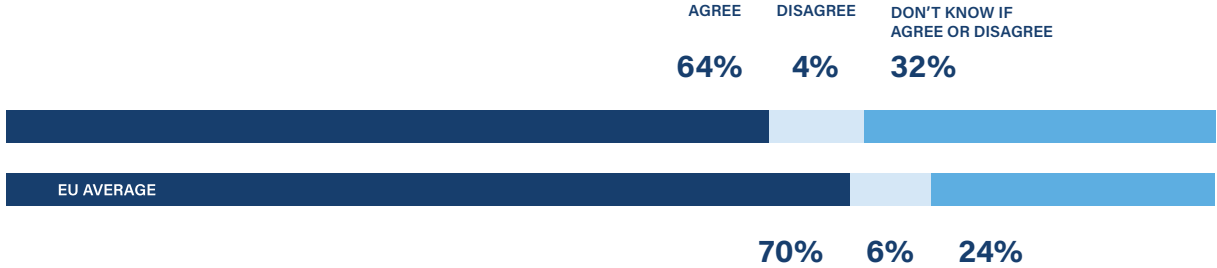


Whilst UK citizens agree that diesel technology is more polluting than EVs, they however strongly believe that the internal combustion engine and cleaner fuels can improve air quality.

Diesel cars are more polluting than electric cars.



Urban air quality can be improved by a combination of newer internal combustion engine cars, fuel technologies and traffic measures.



About Opinium

Opinium is an independent London based polling company built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on the pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter.

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About UKPIA

The United Kingdom Petroleum Industry Association (UKPIA) is the trade association for the UK downstream oil sector. We represent the interests of our members and associate members across the industry, who are involved in the refining, distribution and marketing of oil and gas products in the UK.

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