

The future of Uber in Europe: electric and shared?

Consumer attitudes towards Uber and taxi services

January 2020

Summary

A poll of 12,523 people carried out by YouGov¹ in seven European countries reveals that the majority of people under 35 who use taxi services are willing to pay more for zero-emission Uber and taxi rides. Likewise, the majority of young people in Belgium, France, Germany, Italy, the Netherlands, Spain, and the United Kingdom would, in general, be more willing to share their rides with others if these were cheaper than usual single-occupancy rides.

Similar to the impact measured in US cities, Uber adds to pollution and climate change in European cities too. Recent analysis² shows Uber emissions in Paris and London alone are as high as 500 kilotonnes (kt) of CO₂. This is equivalent to adding the CO₂ emissions of an extra 250,000 privately owned cars to the road. London and Paris are two of the biggest markets in Europe for the ride-hailing company. It's noteworthy that the public perception of the company in those two cities is considerably worse than in other areas of those countries. When asked about Uber's impact on pollution, 44% of Londoners say it is negative overall (vs 12% who hold a positive opinion), compared to 27% in the UK on average. Likewise, 34% of Parisians state that Uber impacts negatively on pollution levels (vs 21% who hold a positive opinion), compared to 25% in France overall.

The poll also shows that younger people, who are most likely to use Uber, are ready and willing to be part of the transition to shared, electric, on-demand mobility. It is now up to the ride hailing and taxi industries to offer attractive zero-emission products that best cater to these expectations and to help their drivers switch to those.

Cities also need to help with the transition to zero-emission mobility. To achieve a smooth switch by 2030, public authorities - with support from the landmark European Green Deal - need to establish emissions-free city centres and roll out dedicated fast charging points.³

1. Introduction: young people are the typical Uber users in Europe

In order to better understand what people in Europe expect from Uber and similar offers, Transport & Environment commissioned British polling company YouGov to survey more than 12,000 people in seven European countries about their attitudes and preferences towards these services.

The findings, published alongside this briefing, show that attitudes toward Uber vary significantly across age and geographies. The first noticeable result is that younger people have more experience with ride hailing services, such as Uber, than older people. In the countries surveyed, almost one in two of under 35s have ever used Uber (42%), compared to less than one in five people age 45 and more (16%). By contrast,

¹ All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 12,523 adults from the UK (N=2,204), France (N=2,091), Germany (N=2,135), Spain (N=2,018), Italy (N=2,062), Netherlands (N=1,011) and Belgium (N=1,002). Fieldwork was undertaken between 28th October - 6th November 2019. The survey was carried out online.

² https://www.transportenvironment.org/sites/te/files/T%26E_Europe%20s%20giant%20taxi%20company%20is%20Uber%20part%20of%20the%20problem%20or%20the%20solution...%20%281%29.pdf

³ <https://www.transportenvironment.org/publications/recharge-eu-how-many-charge-points-will-eu-countries-need-2030>

experience with traditional taxi services is homogeneous across all age categories, with almost two thirds of all people surveyed having ever taken a taxi (64%).

Uber use in the UK, France, Germany, Spain, Italy, the Netherlands and Belgium

Have you ever used Uber?	Total	18 -24	25 - 34	35 - 44	45 - 54	55+
Ever	25%	43%	41%	31%	21%	15%
Never	69%	48%	54%	63%	73%	80%
Don't know	6%	9%	5%	6%	6%	6%

Base: All country adults (12,523) Source: YouGov. Total sample size was 12,523 adults


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The survey findings are in line with previous studies on the socio-economic profile of ride hailing users, who in majority are living in cities larger than 500,000 inhabitants⁴ and are under 30 years old.⁵

These findings suggest that the attitude and opinion of younger generations are likely to matter more to the ride-hailing sector than older people since under 35s are their primary clientele. This short briefing analyses those attitudes and what these mean for Uber and other ride hailing fleets across Europe.

2. Younger Uber users are willing to pay more to ride zero-emission

The poll explores the willingness of people who use taxi services to pay an additional EUR 15 to 20 cents per kilometre for a zero-emission ride. A clear majority of people aged 18-34 - those using Uber and taxi more often - said they are willing to pay a surcharge in order to access zero-emission rides (57%).

Overall, the majority of Italians (69%), French (61%), and Spaniards (62%) are willing to pay more for zero-emission rides. On the other side of the scale, 37 % of Germans and 41% of UK adults are willing to pay more for a clean ride.

Would you be willing to pay a surcharge of 15p to 20p per mile/km for your taxi/ Uber to be a zero-emission car?	Total	Netherlands	Italy	France	Germany	Belgium	Spain	UK
Willing	52%	46%	69%	61%	37%	45%	62%	41%
Not willing	38%	46%	25%	30%	47%	43%	34%	44%
Don't know	10%	9%	6%	10%	16%	12%	5%	15%

Base: All country adults who use taxi services (9,362) Source: YouGov. Total sample size was 12,523 adults


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Interestingly, for both countries the poll shows a generation gap between those under 25, around half of whom would accept to pay more for a clean ride (53% in the UK and 48% in Germany), and a third of those above 55 who wouldn't (34% in the UK and 36% in Germany). The survey shows that older people, especially

⁴ <https://www.vie-publique.fr/sites/default/files/rapport/pdf/194000105.pdf>

⁵ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/751202/taxi-and-phv-england-2018.pdf? ga=2.218500191.796491061.1566827810-679412509.1566827810

those 55 years old or above do not use Uber as much as younger customers. For instance, 20% of UK citizens 55 or older declared having ever taken an Uber, compared to 60% for the 18-24 age group. In Germany this is 5% compared to 26%.

Overall % of people willing to pay a surcharge for their taxi/ Uber to be a zero-emission car	Total	18 - 24	25 - 34	35 - 44	45 - 54	55+
UK	41%	53%	48%	40%	44%	34%
Germany	37%	48%	42%	32%	33%	36%
All countries	52%	60%	56%	52%	49%	50%

Base: UK and German adults who use taxi services (1,974 and 1,657);
All country adults who use taxi services (9,362)

Source: YouGov. Total sample size was 12,523 adults

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Ride-hailing apps such as Uber and Kaptan already propose greener options to their customers, with zero- and low- emission vehicles. However, these services have very few cars available and can be accessed only in a small number of cities. Importantly, they often require longer waiting times to catch the ride due to low offer - something today’s urbanites are not prepared to accept - hence sometimes wrongly claimed to have lower demand.

The survey results clearly show that young riders will not be put off by a surcharge for clean rides. Thanks to London’s ultra-low-emission zone, Uber have set up a clean air fund in the city and committed to fully decarbonised rides by 2025. This scheme introduces a 15p per mile surcharge that goes into a fund to help drivers eligible to benefit from the scheme to switch to an EV.⁶

3. People most exposed to Uber say its impact on pollution and traffic is worse

The perception of Uber’s impact on traffic and pollution clearly depends on whether the service is widely available in the areas where people surveyed live. Uber mainly operates in cities, especially big ones, due to supply and demand forces. In the cities where Uber has the largest operations and started first, citizens polled do have a worse perception of Uber’s impact on the environment and the traffic than in areas where Uber doesn’t operate or their operations are very tiny.

Perception of Uber’s impact on traffic in the UK	London	North	Midlands	East	South	Wales	Scotland	Northern Ireland
Negative	44%	23%	20%	21%	28%	21%	28%	18%
Positive	15%	14%	16%	16%	15%	17%	13%	9%
Neither positive nor negative	29%	35%	38%	44%	35%	34%	37%	43%
Don’t know	10%	21%	19%	16%	18%	21%	18%	21%

Base: All UK adults (2,204)

Source: YouGov. Total sample size was 12,523 adults

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⁶ <https://www.uber.com/gb/en/u/ride-journey-to-electric/>

This is particularly notable in two of the company's biggest markets in Europe - London and Paris greater region. When asked about Uber's impact on traffic, 44% of Londoners say is negative overall, compared to 27% in the UK overall. Parisians have the same reaction: 31% of people surveyed say that Uber has led to worse traffic conditions, compared to 21% in the rest of France.

Perception of Uber's impact on traffic in France	Région Parisienne	Nord-Est	Nord-Ouest	Sud-Est	Sud-Ouest
Negative	31%	16%	19%	20%	17%
Positive	21%	21%	21%	21%	16%
Neither positive nor negative	31%	32%	33%	34%	37%
Don't know	15%	19%	17%	18%	18%

Base: All French adults (2,091)

Source: YouGov. Total sample size was 12,523 adults

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People's perception of Uber's impact on air pollution follows a similar logic. When asked about Uber's impact on air quality, 44% of Londoners say is negative overall, compared to 27% in the UK overall. Likewise, 34% of Parisians state Uber impacts negatively pollution levels, compared to 25% in France overall.

Perception of Uber's impact on pollution in the UK	London	North	Midlands	East	South	Wales	Scotland	Northern Ireland
Negative	44%	23%	22%	24%	27%	15%	28%	23%
Positive	12%	12%	12%	12%	15%	17%	12%	8%
Neither positive nor negative	31%	35%	37%	41%	35%	37%	33%	39%
Don't know	11%	23%	21%	20%	18%	25%	22%	21%

Base: All UK adults (2,204)

Source: YouGov. Total sample size was 12,523 adults

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On the opposite side, Uber enjoys a much better image in Italy where their operations are highly restricted in very few cities and non-existent in most of the peninsula. Almost half of Italians overall think Uber has a positive impact on pollution (42%) and traffic (46%). Madrid region is the exception to the rule with Uber widely available but still people in Madrid having a more positive perception of the company's impact on pollution (52%) and traffic (31%).

Perception of Uber's impact on pollution in France	Région Parisienne	Nord-Est	Nord-Ouest	Sud-Est	Sud-Ouest
Negative	34%	18%	25%	25%	25%
Positive	21%	18%	17%	16%	14%
Neither positive nor negative	28%	35%	32%	32%	33%
Don't know	14%	18%	16%	19%	17%

Base: All French adults (2,091)

Source: YouGov. Total sample size was 12,523 adults



T&E research shows that the overwhelming majority of the vehicles used by Uber and other ride-hailing apps are equipped with internal combustion engines, releasing CO2 and air pollutants in cities. In the case of France, 90% of the vehicles used by ride-hailing companies including Uber are diesel.⁷

Since Uber's arrival in London, its biggest European market, taxi and PHV trips have increased by roughly 25% in the capital. This data strongly correlates with a 23% increase in overall CO2 emissions for the taxi and PHV sector in the UK in the same period.

The analysis estimates that in London and Paris alone, the emissions of Uber taxi services could be as high as half a megatonne of CO2 - 515 kilotonnes of CO2. This is equivalent to adding the CO2 emissions of an extra 250,000 privately owned cars to the road.⁸

4. Improved ride pooling services are key to the sharing revolution

The survey also asked whether people would be willing to share taxi rides in exchange for lower rates. The answers show that people under 35, the group which uses taxi and ride-hailing services most⁹, are likely to share a ride with others if that means getting a discount on their trips (53%). Overall, people are most likely to share a taxi or Uber ride in Italy (64%) and Spain (56%), but are less inclined to do so in the UK (33%). In France and Belgium, people are more likely to share rides in cities where Uber has been operating for a few years, such as the Paris region (51%) and Brussels (57%), compared to the countries overall.

How likely would you be to choose to take a shared taxi journey, if it was cheaper than booking a private taxi journey?	Total	Netherlands	Italy	France	Germany	Belgium	Spain	UK
Likely	49%	50%	64%	47%	48%	47%	56%	33%
Not likely	43%	42%	30%	44%	41%	42%	41%	57%
Don't know	8%	8%	6%	9%	12%	10%	4%	10%

Base: All country adults (12,523)

Source: YouGov. Total sample size was 12,523 adults



⁷ https://www.transportenvironment.org/sites/te/files/T%26E_Europe%20s%20giant%20taxi%20company%20is%20Uber%20par%20of%20the%20problem%20or%20the%20solu...%20%281%29.pdf

⁸ Ibid.

⁹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/751202/taxi-and-phv-england-2018.pdf?_ga=2.218500191.796491061.1566827810-679412509.1566827810

Sharing is also a more popular option among the younger generations, with 56% of people under 25 in the countries surveyed likely to share and only one third (35%) of them being opposed to the idea. This shows an untapped opportunity to share rides of at least 30%, which can lead to a significant reduction of the amount of Uber cars on the roads.

Overall this suggests that through more attractive pricing and better pooling services both traditional taxi companies and ride hailing services can incentivise their users to share more rides, thus contributing to reduced congestion.

How likely would you be to choose to take a shared taxi journey, if it was cheaper than booking a private taxi journey?	Total	18 - 24	25 - 34	35 - 44	45 - 54	55+
Likely	49%	56%	51%	49%	48%	47%
Not likely	43%	35%	41%	43%	43%	45%
Don't know	8%	9%	8%	9%	9%	8%

Base: All country adults (12,523)

Source: YouGov. Total sample size was 12,523 adults


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The survey also indicates a clear overall support (43% in favour vs 18% against) for Uber to share their data with public transport authorities so that they can improve their transport system, even if 29% of the people interviewed don't have an opinion on this subject. Support is even stronger among young people between 18 and 34 (49% in favour), who might be more aware of the current and future importance of data sharing between private and public sector mobility operators.

Data generated by new mobility services including ride-hailing help city authorities improve the efficiency of their mobility systems. For instance, public transport agencies could improve their services if they had access to anonymised datasets from ride-hailing companies about pick-up and drop-off locations, dates and times of rides. Moreover, public transport authorities could add or reroute lanes, and adapt their service time to best fit people's needs. In Washington and San Francisco, such data help the cities identify the most efficient pick-up and drop-off locations for ride-sharing and delivery services.

5. Conclusion: the majority of young urbanites are ready for zero-emission shared rides

This first-of-its-kind YouGov poll done for Transport & Environment shows that Uber's typical users, urbanites under 35, are well aware of the challenges brought about by ride-hailing platforms, such as increased traffic congestion and pollution. Their customer base is also ready to adapt their behaviour, share more rides and pay more per kilometre for drivers to switch to zero-emission cars. As cities move to restrict access to diesel and petrol cars in favour of cleaner alternatives and towards more flexible, on-demand mobility options, these findings clearly show the future can be electric and shared. It is up to the taxi and ride-hailing companies to take up the challenge and offer adequate products.

Uber, like other companies and sectors, need to do their share and be part of the drive to climate-neutral Europe. The European Green Deal strategy announced at the end of 2019 - designed to put the EU on track to zero emissions by 2050 - clearly highlights that cities need to go zero-emission and zero-pollution fast. The electrification of city fleets that drive many kilometres daily - delivery vans, taxis and ride hailing services - can already be done now, and should be accompanied by the deployment of sufficient charging

infrastructure and the upgrading of electricity grids where needed.¹⁰ The European Union, through regulatory and funding instruments, should support cities in this transition to climate-neutral mobility in the next 10 years.

Further information

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¹⁰ <https://www.transportenvironment.org/sites/te/files/publications/01%202020%20Draft%20TE%20Infrastructure%20Report%20Final.pdf>