



Almost two in three European city dwellers want only emission-free cars after 2030

Results of a Pan-European online survey in 15 cities across 8 countries

April 2021

Summary

The future of the car is one of the most heatedly debated issues in transport policy. Consumers and companies across Europe alike are rapidly switching to emission-free cars, which led to a trebling of electric car sales in Europe in 2020.¹ The policy-makers at all levels are also reconsidering the role of internal combustion engines in view of the EU's climate policies that require climate neutrality by mid-century. Ten European governments have already adopted plans to phase-out the sales of internal combustion engines² and a series of major cities (including Paris, Amsterdam, Madrid and London) will only allow emission-free cars onto their territory in the next few years.³ This has not gone unnoticed by carmakers, several of whom (including General Motors, Volvo and Jaguar Land Rover) have already announced voluntary end dates for the production of fossil cars.

A key moment in this regard will be the upcoming review of the EU CO2 standards for cars and vans, which the European Commission is set to propose this summer. A phase-out of cars with internal combustion engines is one of the regulatory options considered for this view. With all this in mind, T&E decided to gauge public opinion to understand whether people on the ground support such policies. A representative Pan-European online survey with 10,050 respondents across 15 large European cities in 8 countries was commissioned to leading institute YouGov. The main results are:

- Across all cities, almost **two in three city dwellers (63%) support** the idea that after 2030 only emission-free cars should be allowed to be on sale in Europe. This shows that the public⁴ is broadly supportive of an EU-wide phase-out of combustion engine cars.

¹ Transport & Environment. (2021). CO2 targets propel European EV sales. [Link](#)

² The International Council on Clean Transportation. (2020). Growing momentum: Global overview of government targets for phasing out sales of new internal combustion engine vehicles. [Link](#)

³ Transport & Environment. (2019). Low-Emission Zones are a success - but they must now move to zero-emission mobility. [Link](#)

⁴ 3 in 4 Europeans live in urban areas. See Statista. (2020). Degree of urbanization. [Link](#)

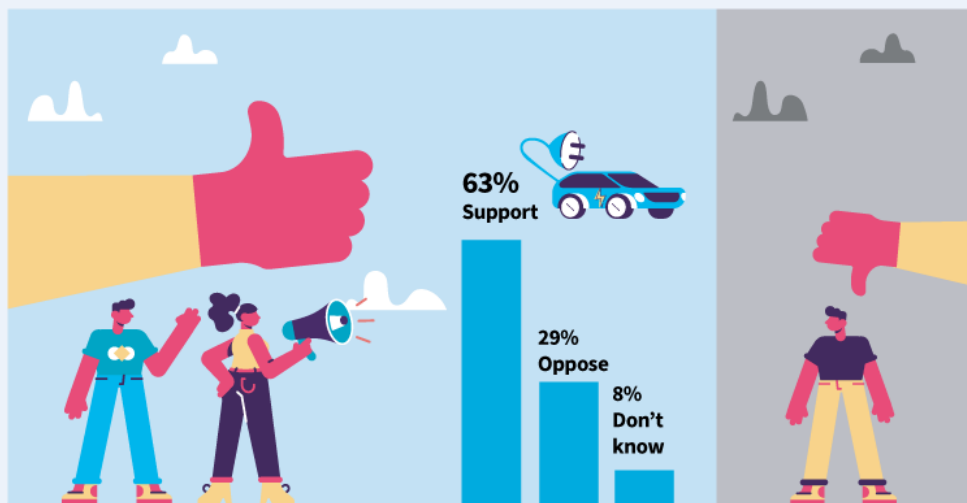
Polling conducted by:

YouGov[®]

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- In **all of the 15 cities** across 8 countries in **Western, Southern and Eastern Europe**⁵, there is a consistent **majority in support** (51% to 77%) of emission-free cars sales after 2030.
- **Respondents who got infected with Covid-19** or whose close ones suffered from the virus show **significantly stronger support** than those who don't know people who got sick or don't recall (66% vs. 56%).
- **Price** (55%), **infrastructure** (51%) and the **range** of electric vehicles (45%) are seen as the **main factors** that will drive the sales of electric cars above those of petrol and diesel cars.⁶
- Only one in ten (10%) of all respondents thinks that electric car sales will not overtake those of petrols and diesels in the future.

Almost two in three European city dwellers want only emission-free cars after 2030



N=10,050 city residents in 15 cities in 8 countries

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Source: YouGov

In T&E's view this shows that Europeans are ready for the switch to zero-emission mobility. Politicians should listen, and the European Commission should, this summer, propose an EU-wide phase-out of cars with internal combustion by 2035 at the very latest.

⁵ The cities covered are London (UK), Birmingham (UK), Madrid (Spain), Barcelona (Spain), Milan (Italy), Rome (Italy), Hamburg (Germany), Berlin (Germany), Paris (France), Lyon (France), Brussels (Belgium), Antwerp (Belgium), Warsaw (Poland), Kraków (Poland), Budapest (Hungary).

⁶ The list included (see also page 6): When electric cars don't cost more than diesel or petrol cars; When there is sufficient charging infrastructure at home, at work and in the public space for electric cars; When electric cars allow people to drive as many miles or kilometres as you can on a full tank with a diesel and petrol car; When European manufacturers produce enough batteries in Europe, avoiding relying on importing them; none of these; don't know; Not applicable - I don't think the sales of emissions-free cars will never overtake the sale of petrol and diesel cars.

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1. Context and methodology

The future of the car is one of the most heatedly debated issues in transport policy. As more and more consumers and companies are switching to electric cars at an unexpected pace, more and more governments announce an end date for the sales of cars with internal combustion engines (ICEs). Ten European governments⁷ have already adopted such plans and a series of major cities (including Paris, Amsterdam, Madrid and London) will only allow emission-free cars on their territory in the future.⁸ Several carmakers (including General Motors, Volvo and Jaguar Land Rover) have reacted by reallocating investments and announcing a complete transition to zero-emission technology.

EU regulations, especially the CO2 standards for cars and vans, are the main driver of this development and have made Europe the e-mobility frontrunner.⁹ Currently the EU is reviewing its policies to achieve a 55% greenhouse gas reduction by 2030 and align with the European Green Deal's target of climate neutrality by 2050. The CO2 standards for cars and vans are at the heart of these efforts in transport and are up for review in the summer of 2021. The European Commission is expected to publish its legislative proposal in June 2021 and said that it was considering an EU-wide end-date for new diesel and petrol cars.¹⁰

Transport & Environment decided to gauge public support for such policies in the EU. A representative survey was commissioned to leading research institute YouGov, focusing on major cities. A city focus was chosen not only because 3 in 4 Europeans live in urban areas¹¹ but also because city dwellers are most exposed to toxic levels of air pollution, another effect of internal combustion engines.¹² The survey was carried out as follows:

- Fieldwork was undertaken between 3rd to 22nd March 2021.
- The total sample size was 10,050 adults interviewed in 15 cities across 8 countries from Western, Southern and Eastern Europe. The cities covered were London (UK), Birmingham (UK), Madrid (Spain), Barcelona (Spain), Milan (Italy), Rome (Italy), Hamburg (Germany), Berlin (Germany), Paris (France), Lyon (France), Brussels (Belgium), Antwerp (Belgium), Warsaw (Poland), Kraków (Poland) and Budapest (Hungary) (see map below).
- The survey was carried out online.
- The figures have been weighted and are representative of all adults living in the city interviewed in (aged 18+).

⁷ The International Council on Clean Transportation. (2020). Growing momentum: Global overview of government targets for phasing out sales of new internal combustion engine vehicles. [Link](#)

⁸ Transport & Environment. (2019). Low-Emission Zones are a success - but they must now move to zero-emission mobility. [Link](#)

⁹ Transport & Environment. (2021). CO2 targets propel European EV sales. [Link](#)

¹⁰ European Commission. (2020). Stepping up Europe's 2030 climate ambition. [Link](#)

¹¹ Statista. (2020). Degree of urbanization (percentage of urban population in total population) by continent in 2020. [Link](#)

¹² European Environment Agency. (2020). Air quality in Europe - 2020 report. [Link](#)

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3

Map of the cities covered by the survey



Covered cities are:
Paris, Lyon, Hamburg,
Berlin, Rome, Milan,
Barcelona, Madrid,
London, Birmingham,
Budapest, Warsaw,
Kraków, Antwerp and
Brussels

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 10050 adults interviewed in London, Birmingham, Madrid, Barcelona, Milan, Rome, Hamburg, Berlin, Paris, Lyon, Brussels, Antwerp, Warsaw, Kraków, Budapest. Fieldwork was undertaken between 3rd - 22nd March 2021. The survey was carried out online. The figures have been weighted and are representative of all adults living in the city interviewed in (aged 18+)

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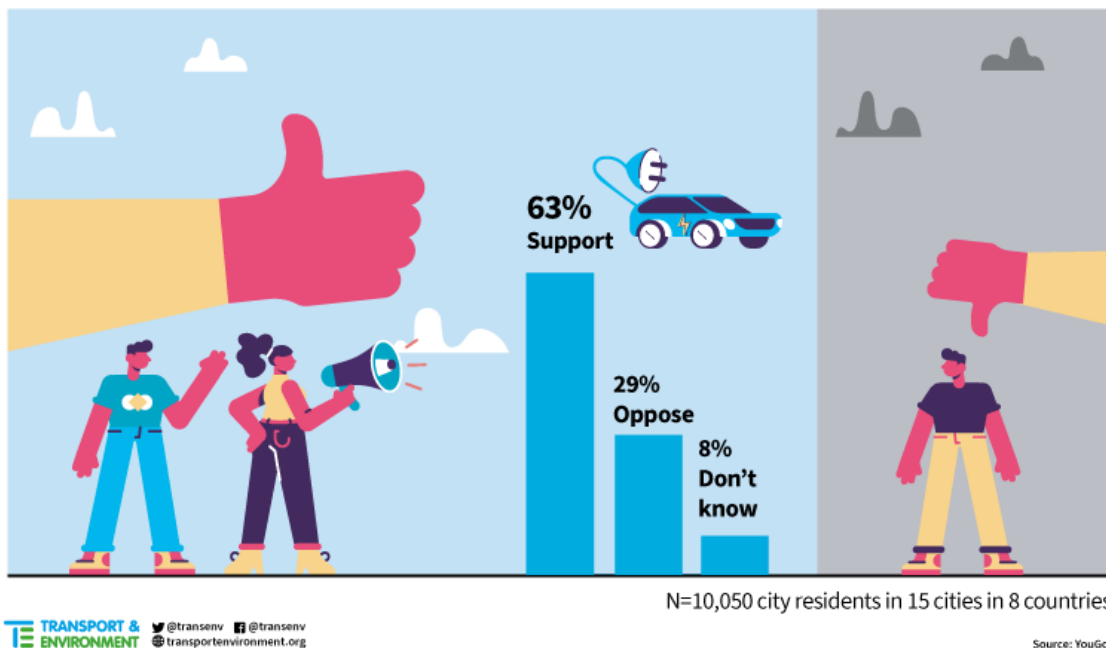
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2. Main findings

2.1. Support for phasing-out the sales of combustion cars after 2030

Almost two in three European city dwellers want only emission-free cars after 2030



The results show a strong support among European city dwellers for a Europe-wide end of fossil car sales after 2030. The main findings are:

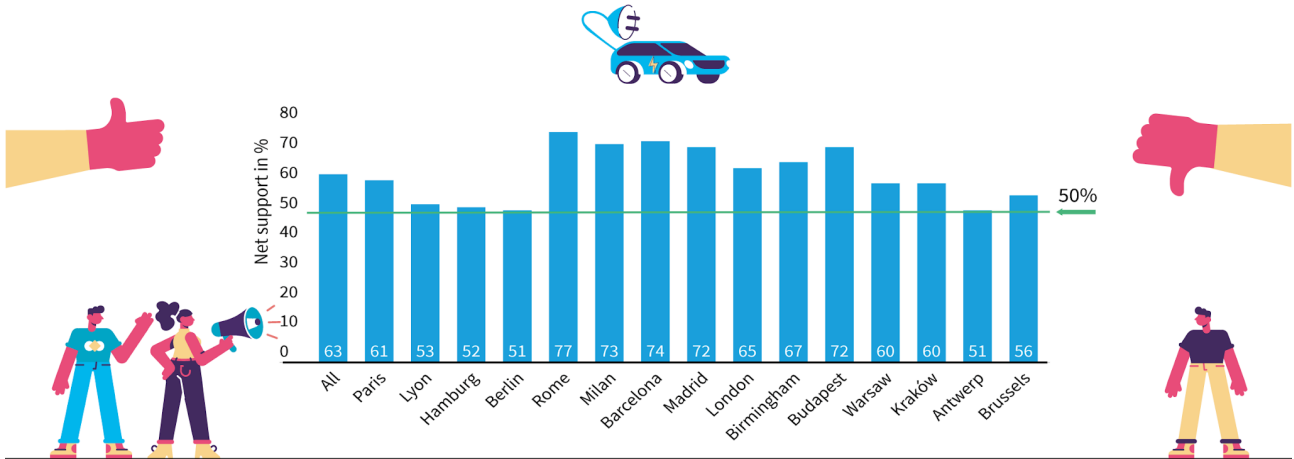
- Across all cities, almost **two in three (63%) city dwellers** support the idea that after 2030 only emission-free cars should be allowed to be on sale in Europe. Only 29% of all respondents oppose a phase-out.
- In **all of the 15 cities across 8 countries**, covering Eastern, Southern and Western Europe, there is a **majority in support** (between 51% and 77%).
- The support is strongest in Rome (77%), Barcelona (74%), Milan (73%), Budapest (72%) and Madrid (72%), while it is somewhat less strong in Antwerp (51%), Hamburg (52%), Berlin (51%), and Lyon (53%).

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Majorities in major cities want only emission-free cars sold after 2030



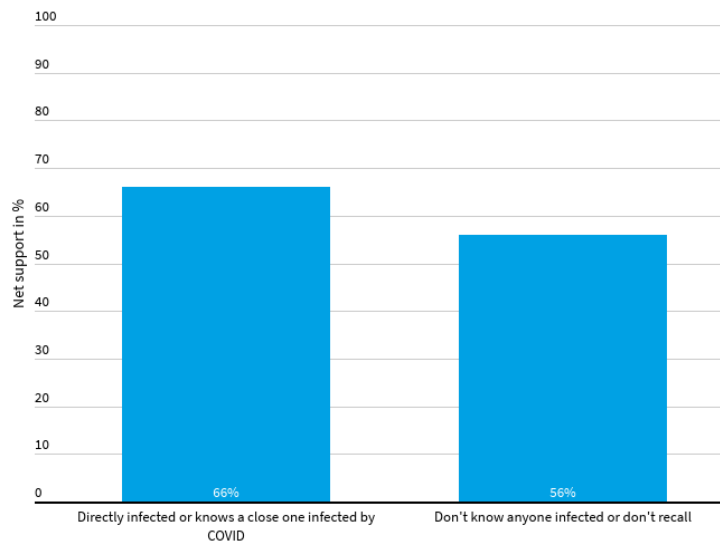
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Source: YouGov

- Respondents who got infected with Covid-19 show particularly strong support, with 66% in support vs. 56% among those who don't know anyone who go stick or don't recall.

After 2030, only emission-free cars should be allowed to be on sale in Europe



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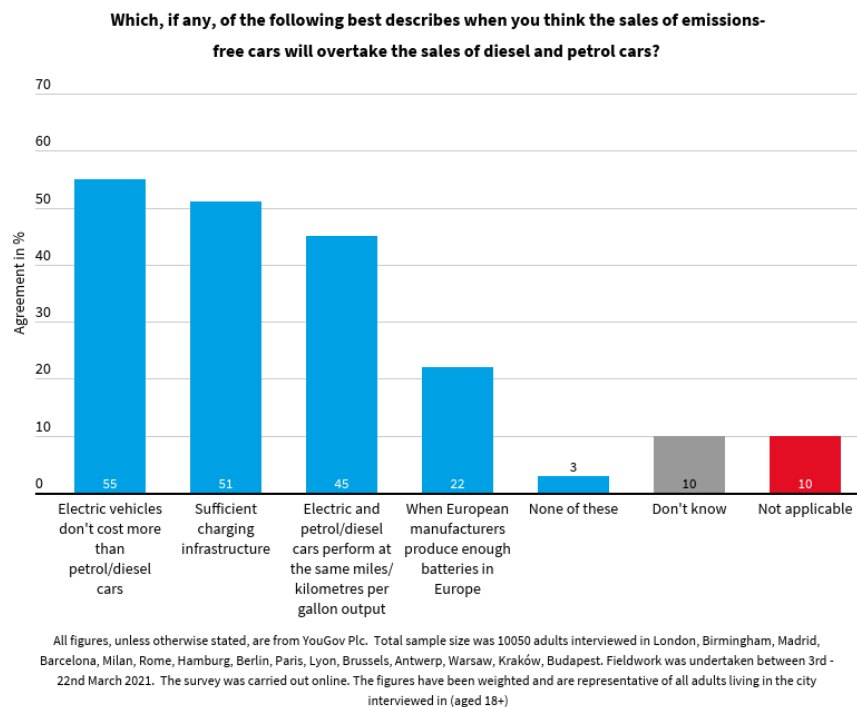
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2.2 Cost and infrastructure seen as main factors for emission-free cars to dominate the market

The survey also asked which factors in respondents' opinion best describe when the sales of emissions-free cars will overtake those of diesel and petrol ones. The most frequent answers were:

- 55% of all respondents think that this will happen when electric cars don't cost more than diesel or petrol cars, i.e. when the cost parity is reached.
- 51% of all respondents think that this will happen when there is sufficient charging infrastructure at home, at work and in the public space.
- 45% of all respondents think that this will happen when electric cars allow people to drive as many miles or kilometres as you can on a full tank with a diesel and petrol car.
- 22% think this will happen when European manufacturers produce enough batteries in Europe, avoiding relying on importing them. T&E has recently shown¹³ that this can happen as soon as this year.
- Only 10% of all respondents think the sales of emissions-free cars will not overtake those of diesel and petrol cars.
- This means that 90% of all respondents expect the sales of emissions-free cars to overtake those of diesel and petrol cars in the future according to one of the scenarios listed in the survey.



¹³ T&E, <https://www.transportenvironment.org/publications/batteries-vs-oil-comparison-raw-material-needs>

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3. Conclusions

The representative online survey in 15 cities commissioned by Transport & Environment clearly shows that the majority of Europeans in the major cities covered by the survey want fossil cars out of Europe after 2030. While the majority think that the sales of emissions-free cars will overtake those of petrol and diesel models, the survey also revealed that price, charging infrastructure and electric car range are seen as the main factors among those listed that will determine how fast this will happen.

In T&E's view this means that:

- European and national politicians should listen to citizens who are ready for the full transition to zero-emission vehicles. The European Commission should, this summer, propose an EU-wide phase out of cars with internal combustion engines.
- An EU-wide commitment to 100% zero emission cars will also provide clarity to citizens and businesses, which is all the more important given that more than 90% of city dwellers already expect that the sales of emission-free cars will overtake those with internal combustion engines.
- The main factors that citizens identified for emission-free car sales to overtake diesel and petrol confirm previous analyses, highlighting the importance of purchase costs (that are now fast decreasing), charging infrastructure (that is ramping up), as well as range (which is already above 300km on one charge). These factors are already seeing rapid progress helping the current ramp-up of sales.
- In cities, cars are not only linked to the climate challenge but also use a lot of space, produce air pollution and noise, and cause accidents. On top of being emissions free after 2030, more cars should go beyond single occupancy and be shared, and wherever possible, mobility should move to public and active means of transport. .

Further information

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