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FREEDOM
OF MOBILITY
FORUM 

How will our planet accommodate the mobility needs of 8 billion people?

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Introduction

How will our planet accommodate the mobility needs of 8 billion people?

For the 2024 edition of its annual debate, the Freedom of Mobility Forum collaborated with YouGov, a global online research company.

The aim? To share more facts and figures during the debate, in line with the Forum's key engagement principles.

A global survey

- Run in 5 countries: Brazil, France, India, Morocco and USA
- 3 key questions
- 5,095 respondents (~ 1,000 / country represented*)

* National population aged 18+



Q: When choosing among transportation options in general, what best describes you?

How will our planet accommodate the mobility needs of 8 billion people?

Please select only one answer.

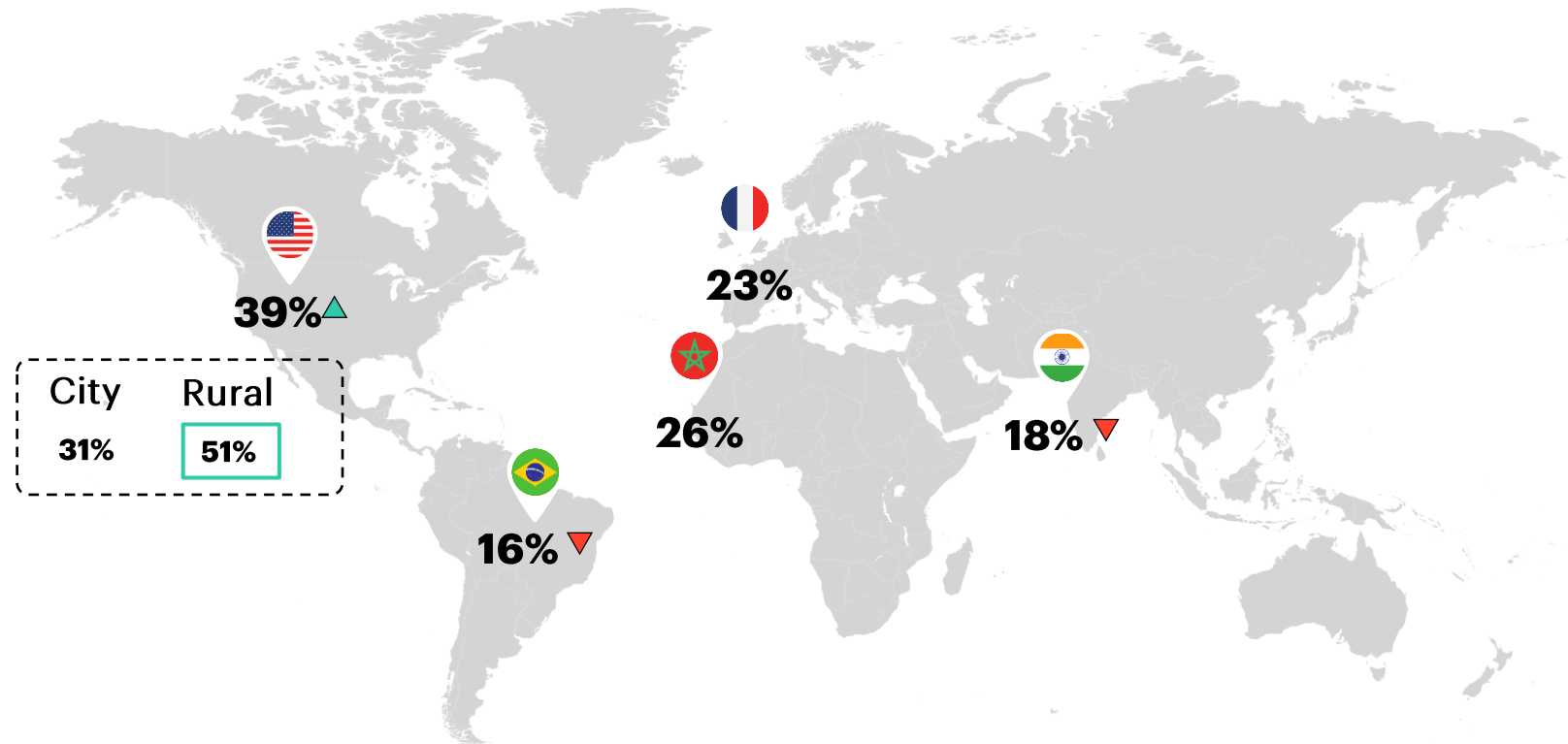
- Not ready to change anything**
(I have not changed my transportation choices to limit my impact on the environment, and do not plan on doing so)
- Ready to change but haven't acted yet**
(I have not yet adapted my transportation choices to limit my impact on the environment, but I am ready to start changing them for this purpose)
- Making some changes**
(I have already taken some measures to change my transportation choices and limit my impact on the environment)
- Making profound changes**
(I have already made radical changes to my transportation choices to limit my impact on the environment)

1 in 4 global citizens* not ready to changed their transportation to limit their impact on the environment and do not plan on doing so.

This is particularly the case in the USA where 2 in 5 declared being not ready to change anything in their transportation choices. Even more pronounced amongst over 55s and in rural areas where it could be a greater challenge.

Of note, much lower percentages in emerging countries such as Brazil and India.

Q: When choosing among transportation options in general, what best describes you? **
% of respondents - **NOT READY TO CHANGE ANYTHING**



* For the 5 countries studied - Base N = 5,095 (N ~ 1,000 per country)

** RESPONSES CHOICE WERE:

Not ready to change anything (I have not changed my transportation choices to limit my impact on the environment, and do not plan on doing so)

Ready to change but haven't acted yet (I have not yet adapted my transportation choices to limit my impact on the environment, but I am ready to start changing)

Making some changes (I have already taken some measures to change my transportation choices and limit my impact on the environment)

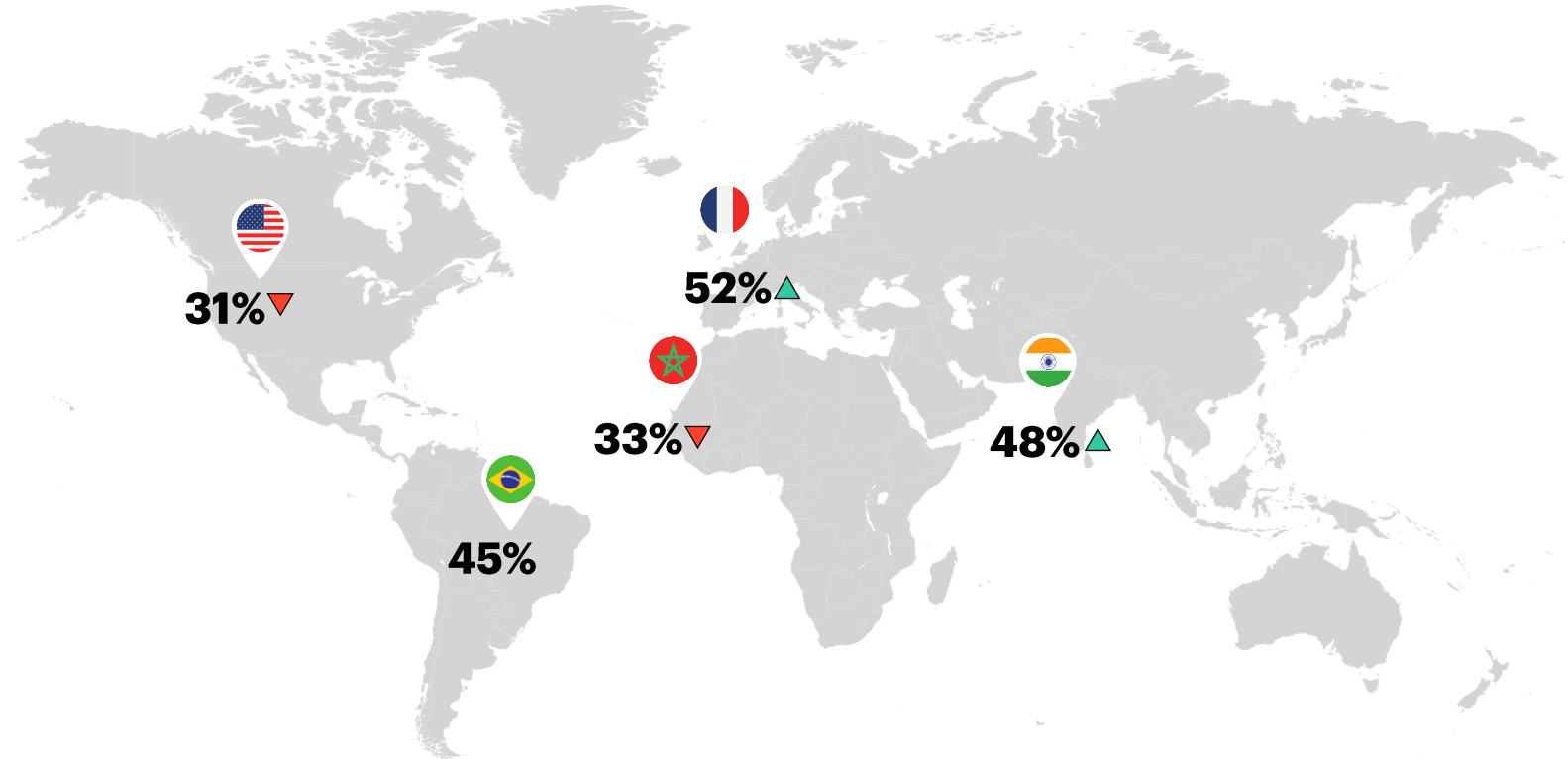
Making profound changes (I have already made radical changes to my transportation choices to limit my impact on the environment)

▲ ▼ Significant differences vs average for all countries
 □ Significant differences vs city/town populations in USA

3 in 4 global citizens* are ready, with more than 40% who have already started.

France is the leading country with more than half of the population who have already started to modify their transportation habits.

Q: When choosing among transportation options in general, what best describes you? **
% of respondents - **HAVE STARTED TO CHANGE** (Making some changes + Making profound changes)



* For the 5 countries studied - Base N = 5,095 (N ~ 1,000 per country)

** RESPONSES CHOICE WERE:

Not ready to change anything (I have not changed my transportation choices to limit my impact on the environment, and do not plan on doing so)

Ready to change but haven't acted yet (I have not yet adapted my transportation choices to limit my impact on the environment, but I am ready to start changing)

Making some changes (I have already taken some measures to change my transportation choices and limit my impact on the environment)

Making profound changes (I have already made radical changes to my transportation choices to limit my impact on the environment)

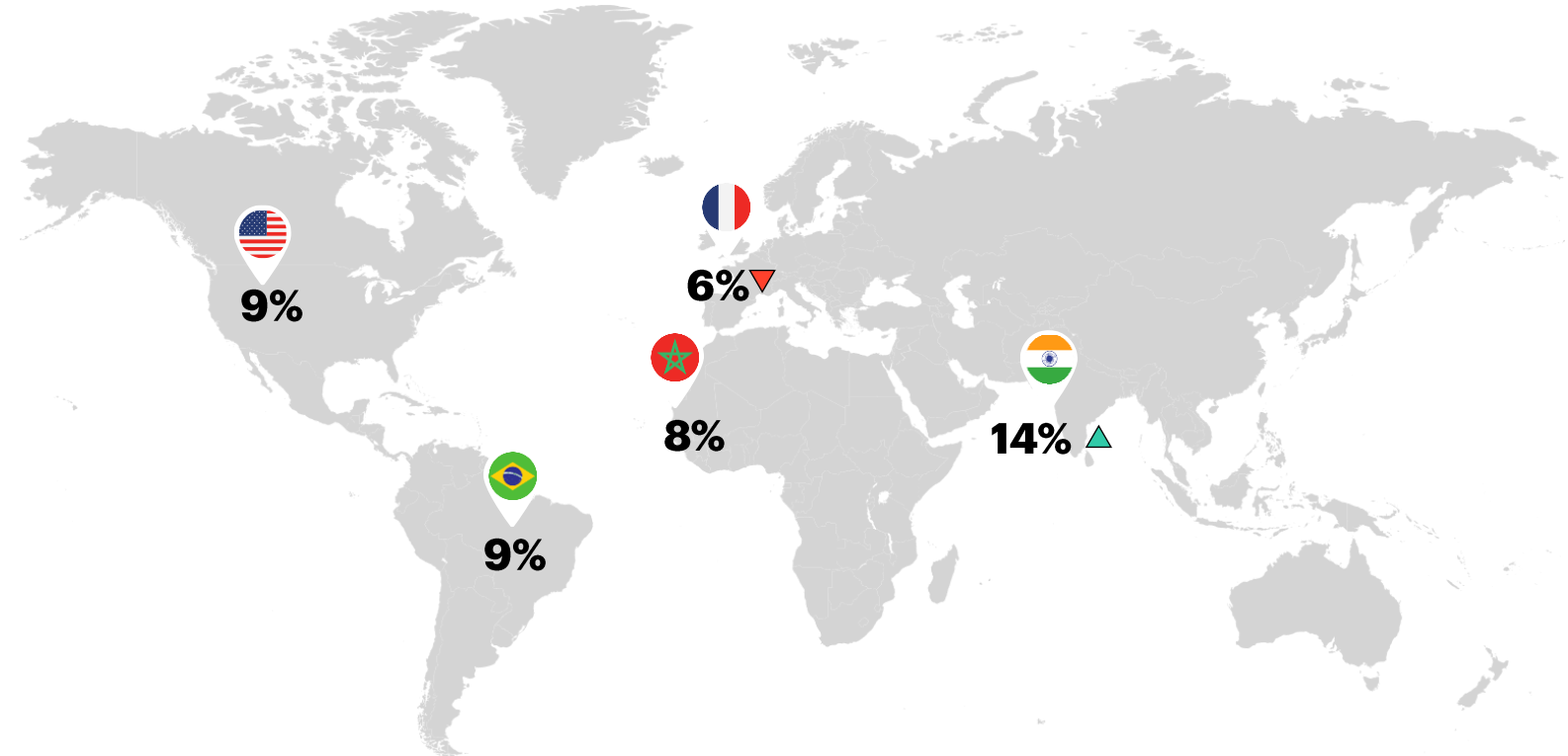
Significant differences vs average for all countries

However less than 10% * have started to make profound changes.

These figures highlight that we are only at the very beginning of a radical change in transportation choices.

Q: When choosing among transportation options in general, what best describes you? **

% of respondents - **ALREADY MADE RADICAL CHANGES**



* For the 5 countries studied - Base N = 5,095 (N ~ 1,000 per country)

** RESPONSES CHOICE WERE:

Not ready to change anything (I have not changed my transportation choices to limit my impact on the environment, and do not plan on doing so)

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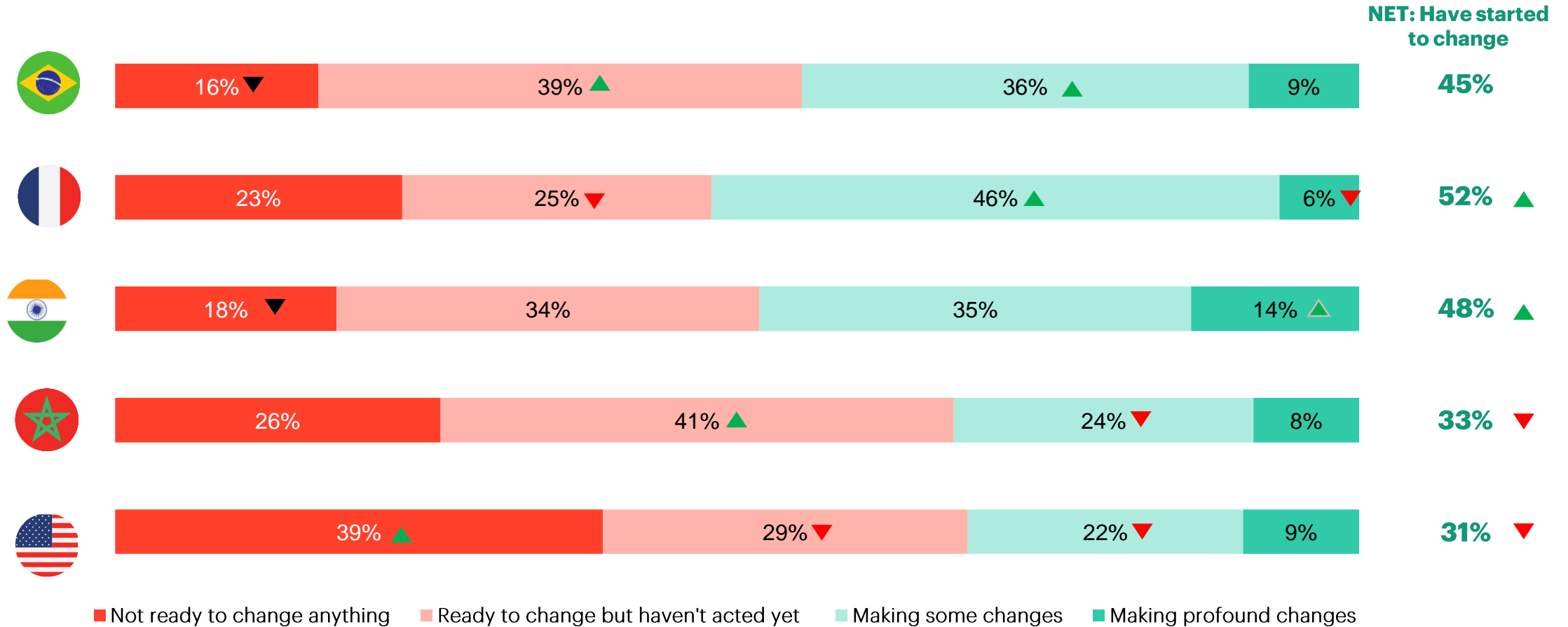
Making profound changes (I have already made radical changes to my transportation choices to limit my impact on the environment)

 Significant differences vs average for all countries

Q. When choosing among transportation options in general, what best describes you?

Please select only one answer.

Deep dive by country



* For the 5 countries studied - Base N = 5,095 (N = 1,000 per country)

▲ ▼ Significant differences vs average for all countries

Q: In response to climate change, would you agree or not to stop using means of transportation where you are the only passenger (e.g., cars, motorbikes...)?

Please select only one answer.

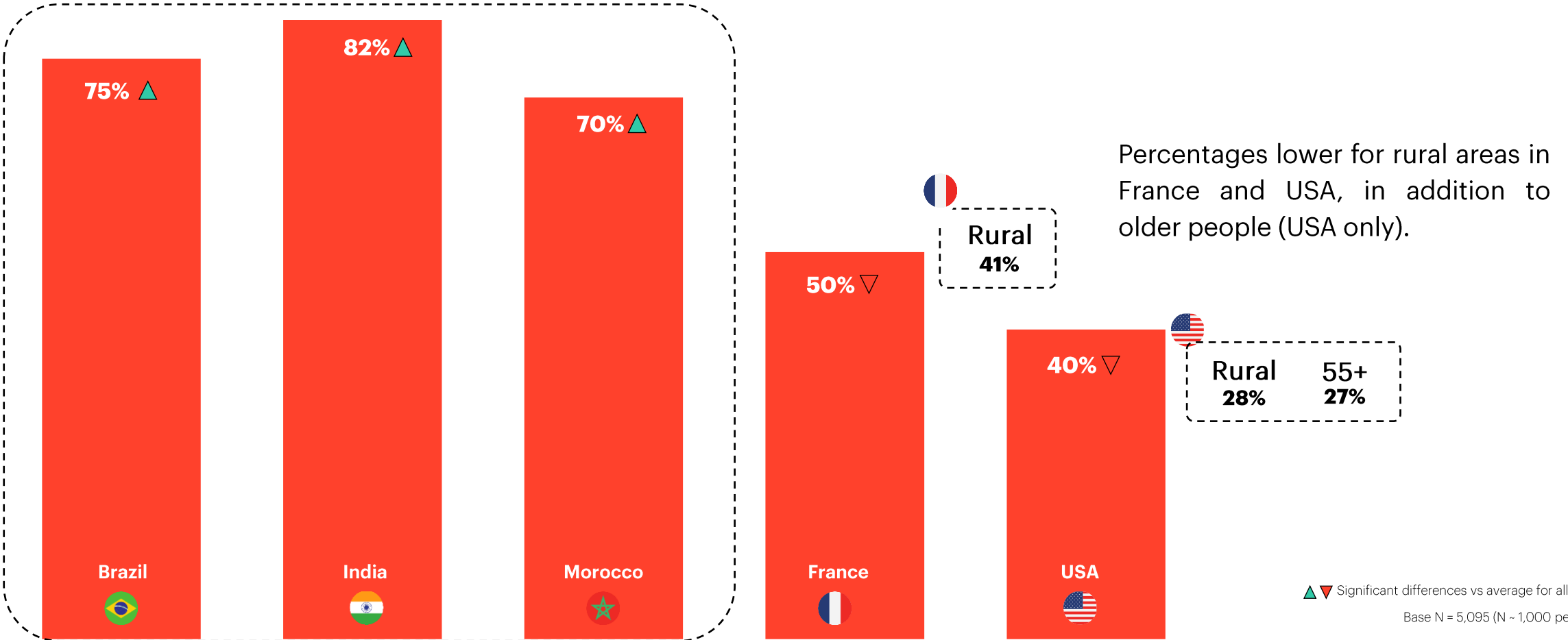
Yes

No

A strong disparity between mature vs emerging markets on abandoning 'driver only' transportation modes.

Q: In response to climate change, would you agree or not to stop using means of transportation where you are the only passenger (e.g., cars, motorbikes...)?

● % Yes, I agree



▲ ▼ Significant differences vs average for all countries

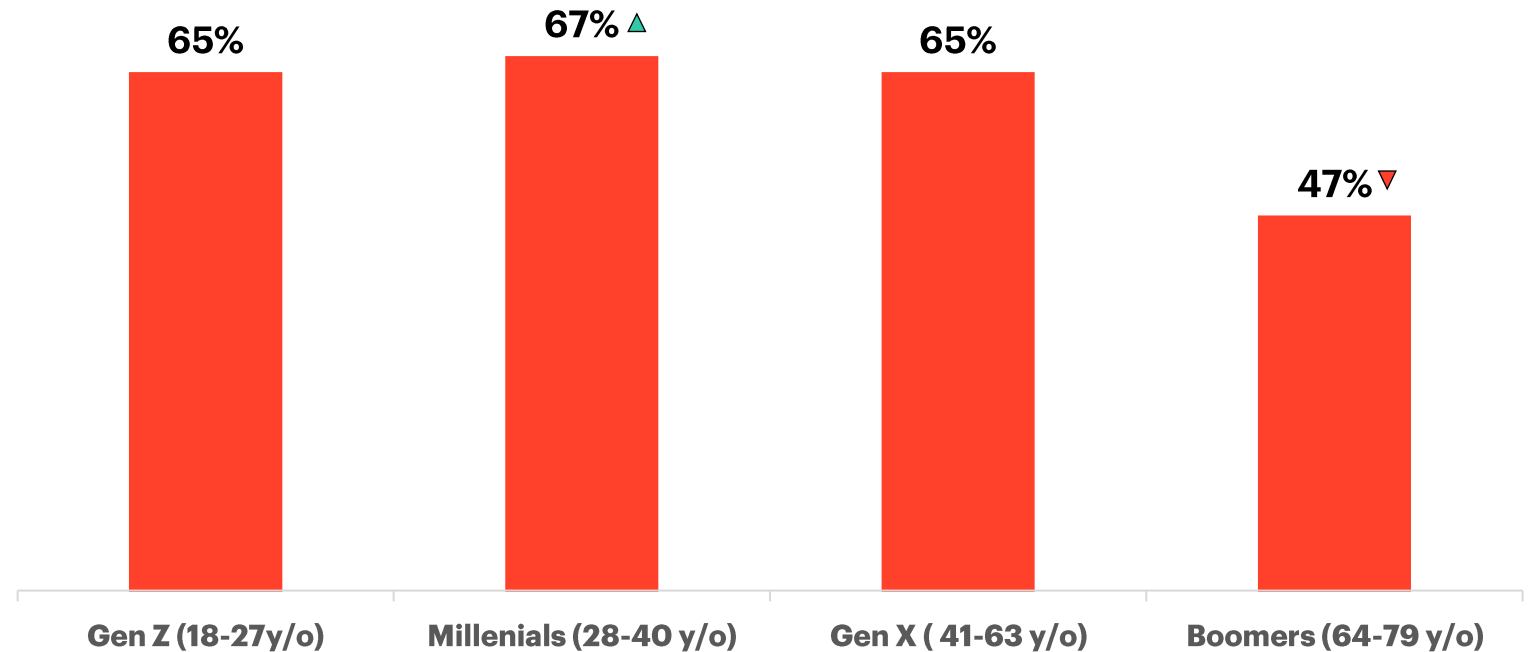
Base N = 5,095 (N - 1,000 per country)

As well as between generations.

A clear divide when it comes to Boomers (over 64 y/o) for whom giving up 'driver only' transportation could be more difficult, as it impacts their independence.

Q: In response to climate change, would you agree or not to stop using means of transportation where you are the only passenger (e.g., cars, motorbikes...)?

% Yes, I agree



* For the 5 countries studied - Base N = 5,095 (N = 1,000 per country)

** RESPONSES CHOICE WERE: Yes / No

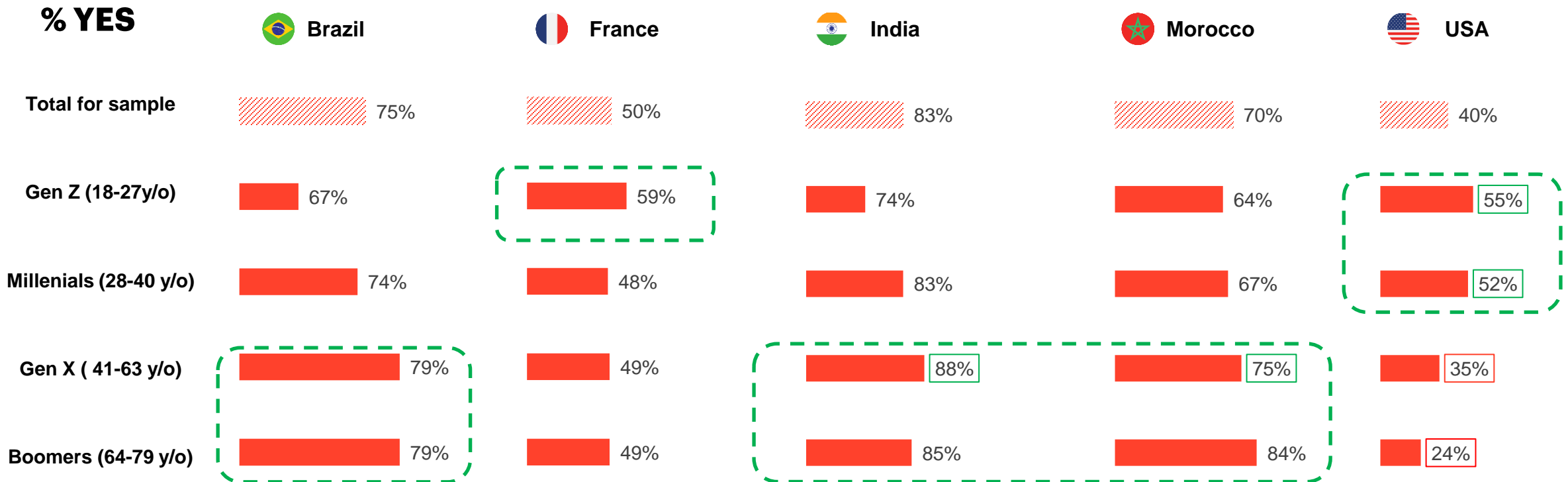
Gen Z N = 1,125 | Millennials N = 1,391 | Gen X N = 1,939 | Boomers N = 612

▲ ▼ Significant differences vs average for all countries

Gen Z is more likely to give up 'driver only' options in USA and France, whereas Gen X & Boomers are more enthusiastic in Brazil, India and Morocco.

More openness from the oldest generations in those 3 countries to changing their habits.

Q: In response to climate change, would you agree or not to stop using means of transportation where you are the only passenger (e.g., cars, motorbikes...)?



* For the 5 countries studied - Base N = 5,095 (N - 1,000 per country)

** RESPONSES CHOICE WERE: Yes / No

 Significant differences vs average of the country

Q: From your point of view as a private citizen, which stakeholders have the biggest influence in driving change for greener transportation options?

Please select up to 3 answers maximum

- **Lawmakers** (governments/politicians/public institutions)
- **Any citizen** (as a consumer or as voter)
- **Companies selling products or services**
- **Media**
- **Youth/Youngest generations**
- **World's richest people**
- **Scientists**
- **Celebrities**
- **NGOs** (non-governmental organizations)
- **I don't know**

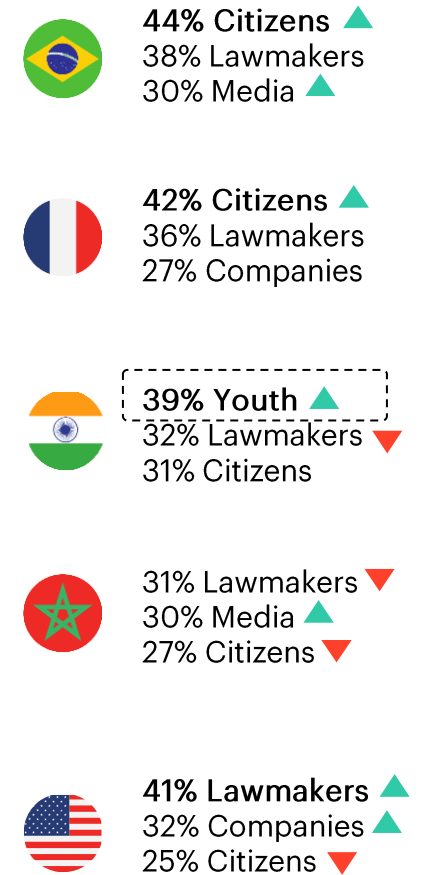
Who is best placed to influence the change for greener transportation options?

Lawmakers and citizens, before companies (except USA - 2nd), are the ones who are perceived as able to bring changes. Of note, for Morocco changes are expected to be brought by a mix of stakeholders.

Q: From your point of view as a private citizen, which stakeholders have the biggest influence in driving change for greener transportation options? **



Country-level Ranking - TOP3



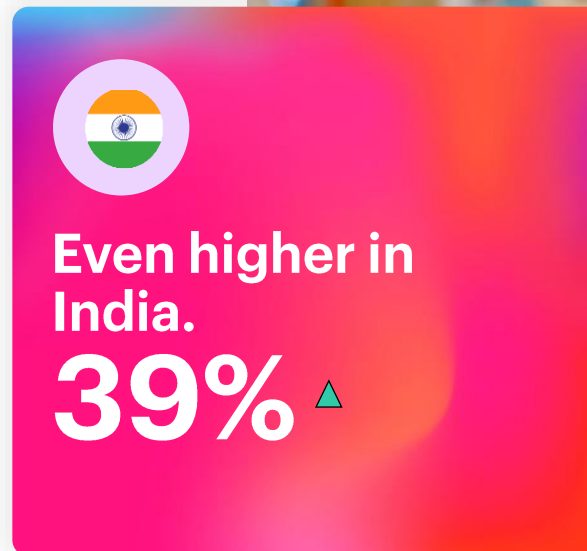
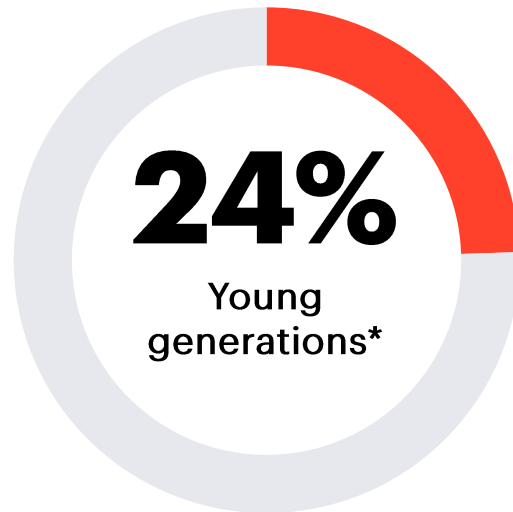
* For the 5 countries studied - Base N = 5,095 (N - 1,000 per country)

** RESPONSES CHOICE WERE : Lawmakers (governments/politicians/public institutions) / Any citizen (as a consumer or as voter) / Companies selling products or services / Media / Youth/Youngest generations / World's richest people / Scientists / Celebrities / NGOs (non-governmental organizations) / I don't know

▲ ▼ Significant differences vs average for all countries

Young generations seen as key in driving greener transportation

Q: From your point of view as a private citizen, which stakeholders have the biggest influence in driving change for greener transportation options?



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Key Insights

1 in 4 global citizens are not ready to make eco-friendly transportation choices - especially in USA, where rural areas pose a significant challenge.

While 3 in 4 individuals are gearing up for greener options, less than 10% have already made profound changes, signaling that we're only just beginning to rev up for bigger changes ahead.

6 in 10 citizens are ready to ditch 'driver only' transportation, but the enthusiasm varies across the map, with India, Brazil, and Morocco leading the charge.

Who's steering this green revolution? It's perceived to be in the hands of lawmakers and citizens, with companies trailing, except in USA.

Don't overlook the power of youth! 1 in 4 global citizens believe they hold the key to our green future, with a significant almost 40% in India believing they can spearhead change.

Thank you

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