

Public Opinion Survey for Motorway Infrastructure and Road Safety



Presentation of Results

By:

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ASECAP ROAD EVENT

ASECAP Toll Roads: A Safe Journey in Europe

Athens March 1st, 2011

InVision Consulting S.A.

Company Profile

InVision Consulting is an independent consulting company based in Athens, Greece. The company focuses on the emerging markets resulting from the convergence of technology and services in the sectors of:

- **Transportation and**
- **Information Technology**

Our clients are companies and organizations covering a wide range of business characteristics and interests, both in the private and public sector, in Greece, Portugal, France, Romania, Philippines, etc.

In the Transport sector we have successfully completed more than 125 projects in the last 12 years in the following areas.

- **Road Side Surveys and Mystery Surveys**
- **Modeling & Forecasting**
- **Motorways Operation**
- **Road Operation Reporting and KPIs**
- **Transit Management Systems**



Survey's overview

Purpose:

To record citizens perception for the development of road infrastructure and safety as well as the operation of the new motorways, on behalf of Olympia Odos, Nea Odos, Kentriki Odos, Moreas and Aegean Motorway.

Methodology:

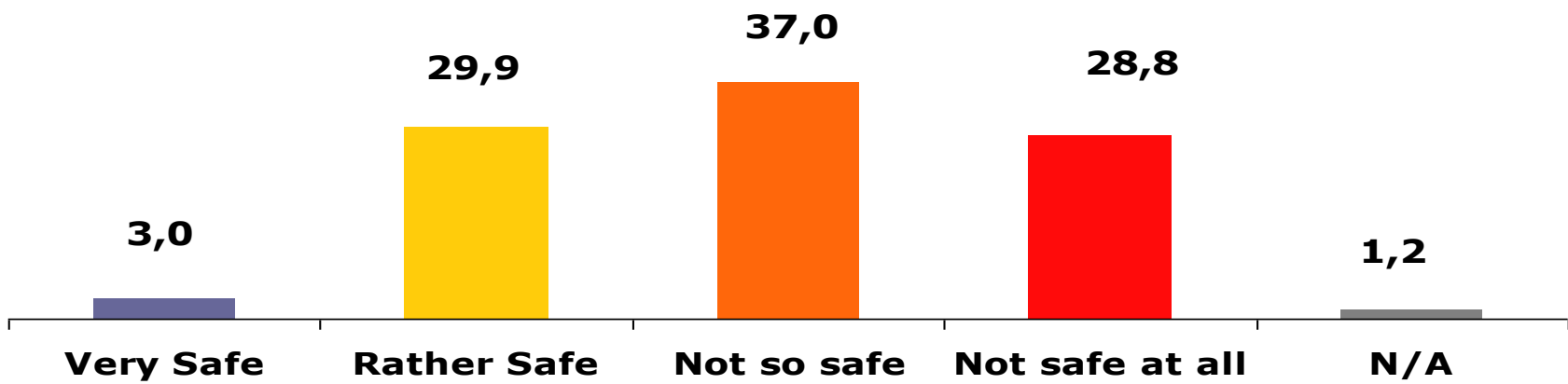
Research Company:	Metron Analysis S.A. for InVision Consulting S.A.
Research type:	Telephone survey
Sample:	1.503 drivers aged 18+
Area covered:	Nationwide (all 6 regions of Greece)
Research Period:	28/1/2011 - 8/2/2011
Weights:	Sex, Age and Urbanity
Statistical Error:	2.5%

Survey's Indicative Results

Safety Level of the existing national road network

Q: What is the level of safety of the national roads in the area of your residence?

66% of the citizens consider the national road unsafe



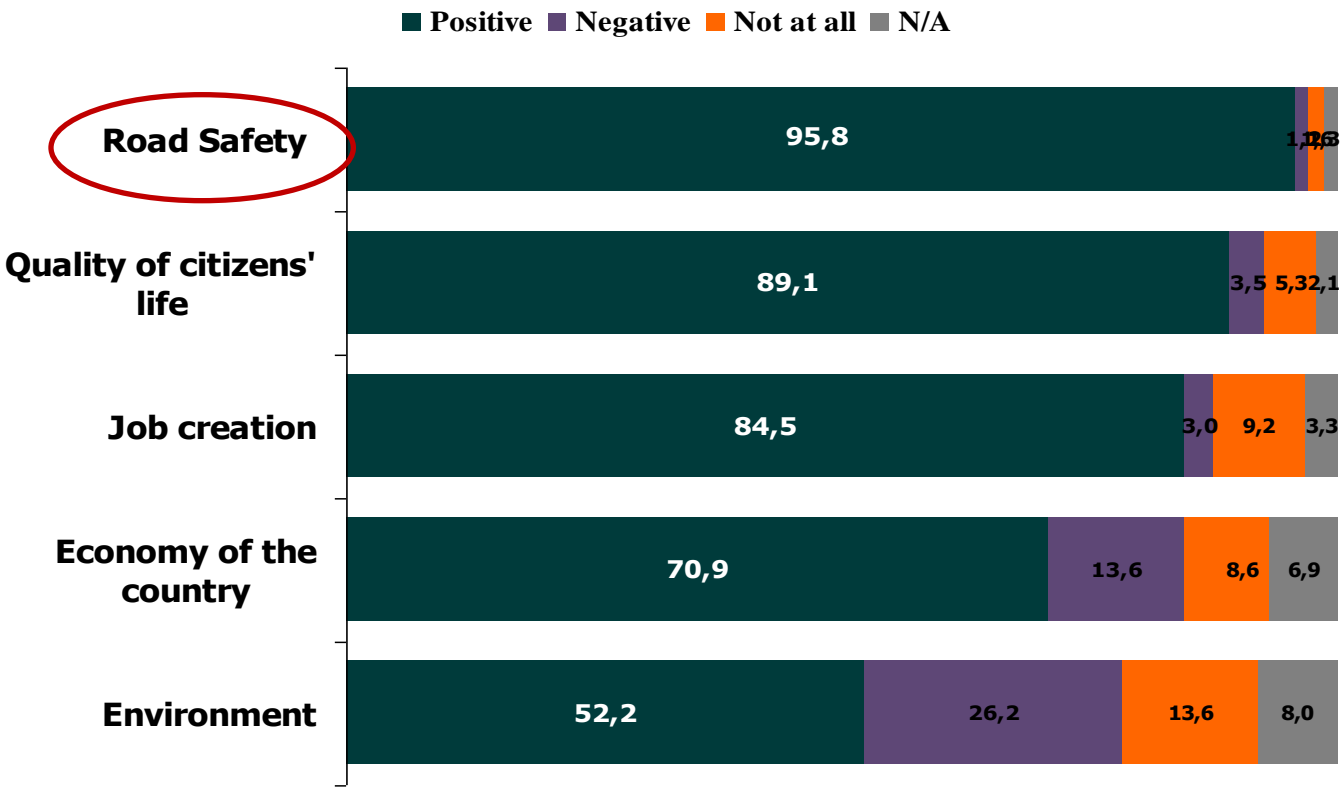
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Survey's Indicative Results

Contribution of modern motorways to road safety

Q: What is the contribution of the motorways that are under improvement and development to:



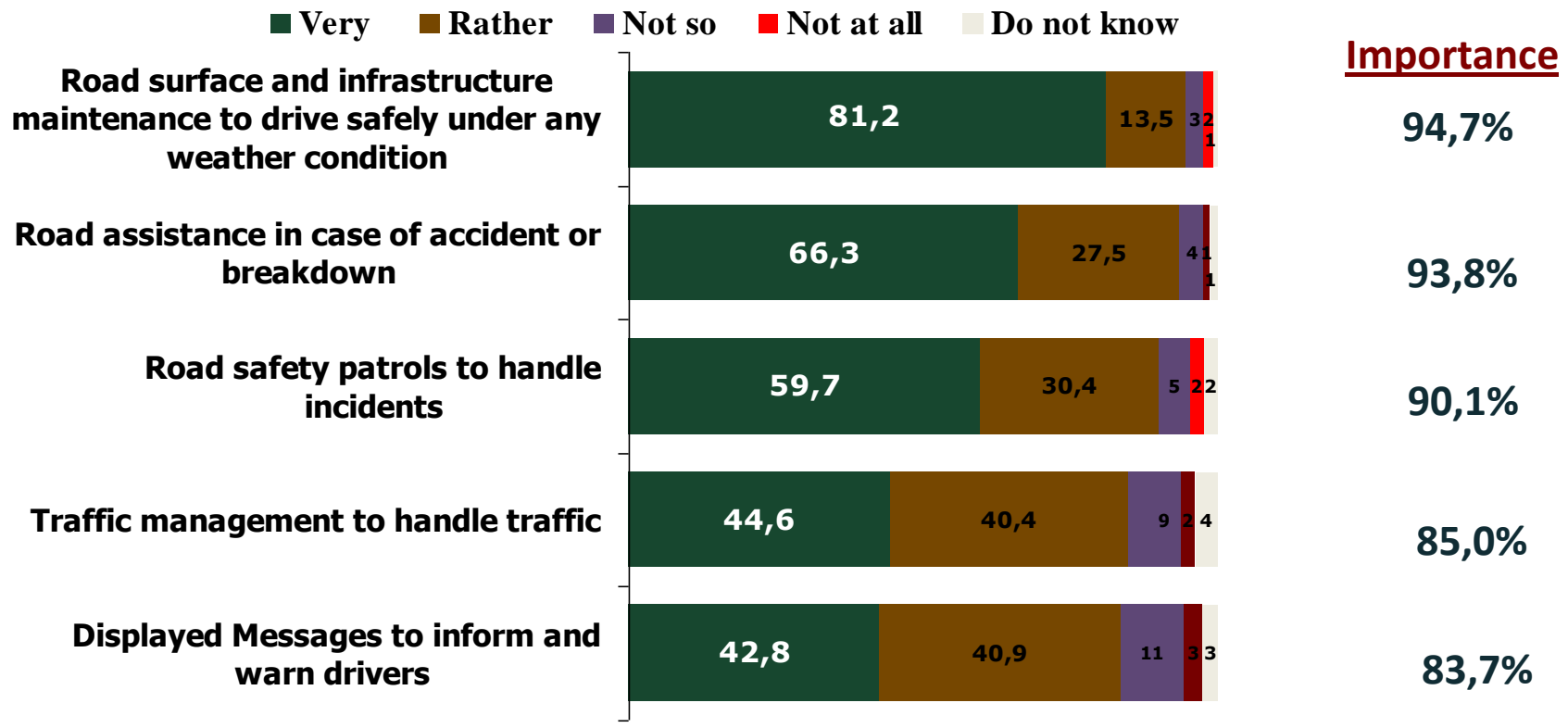
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Survey's Indicative Results

Road operation services: Luxury option or Necessity ?

Q: How important is for you the following services when you are using a motorway?



[%]

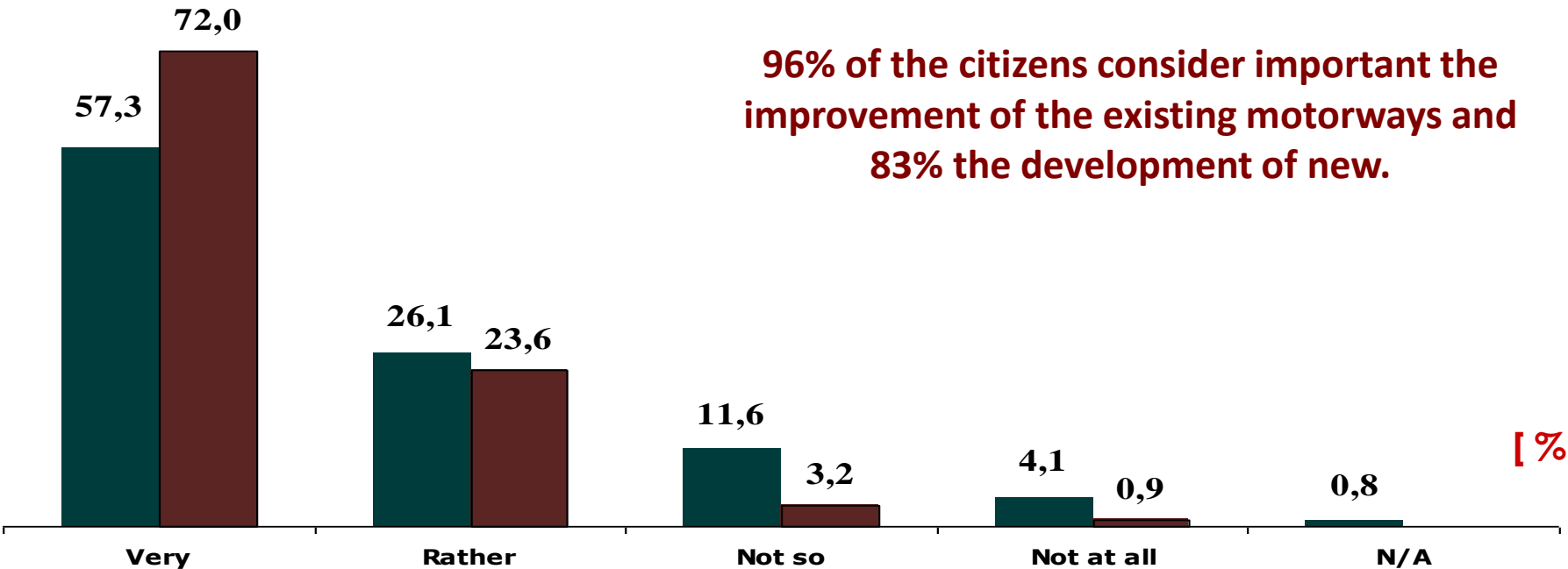


Survey's Indicative Results

Development of new and improvement of existing motorways

Q: How important is the development of new and the improvement of existing motorways in your region?

■ Development of new ■ Improvement of existing



96% of the citizens consider important the improvement of the existing motorways and 83% the development of new.

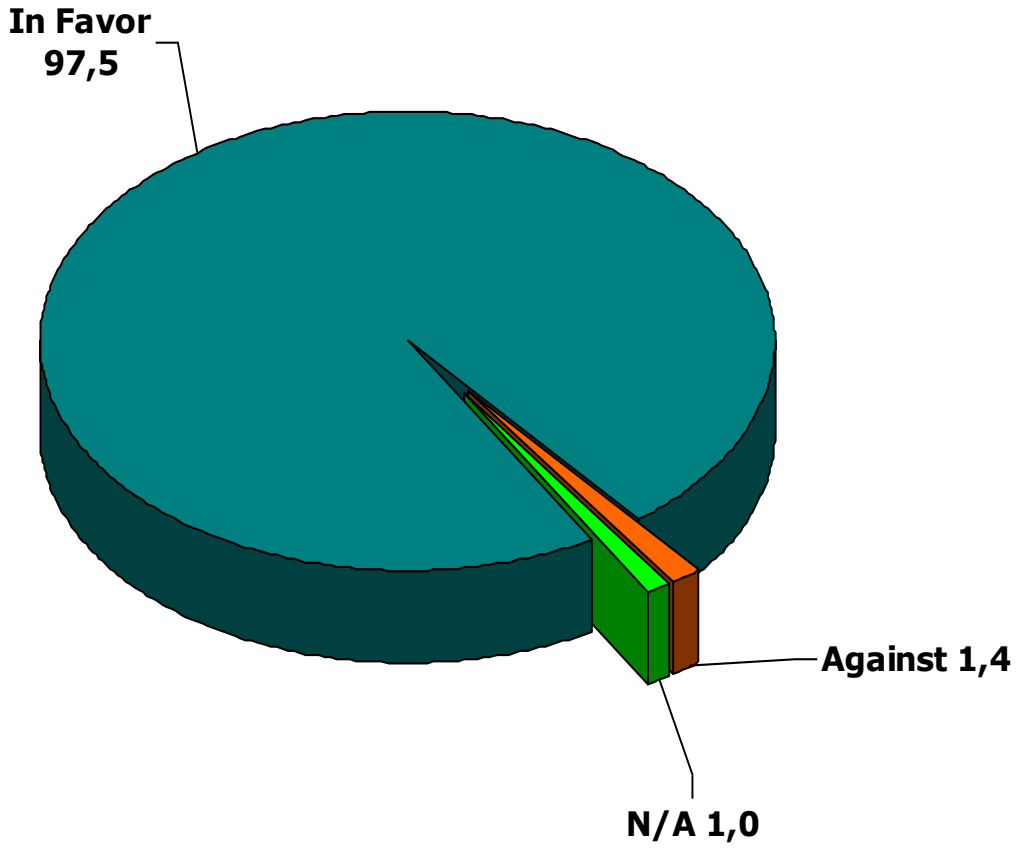
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Survey's Indicative Results

Motorways under construction: Be completed or abandoned ?

Q: The construction and improvement of major motorways is in progress. Are you in favor or against their completion?



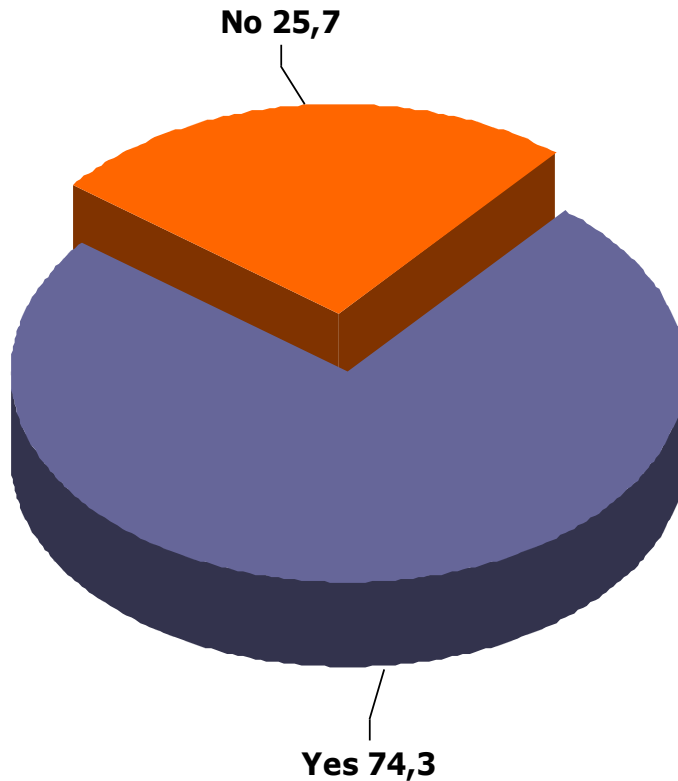
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Survey's Indicative Results

To what extent are Tollways being used by motorists ?

Q: Have you used a tolled motorway during the last year?



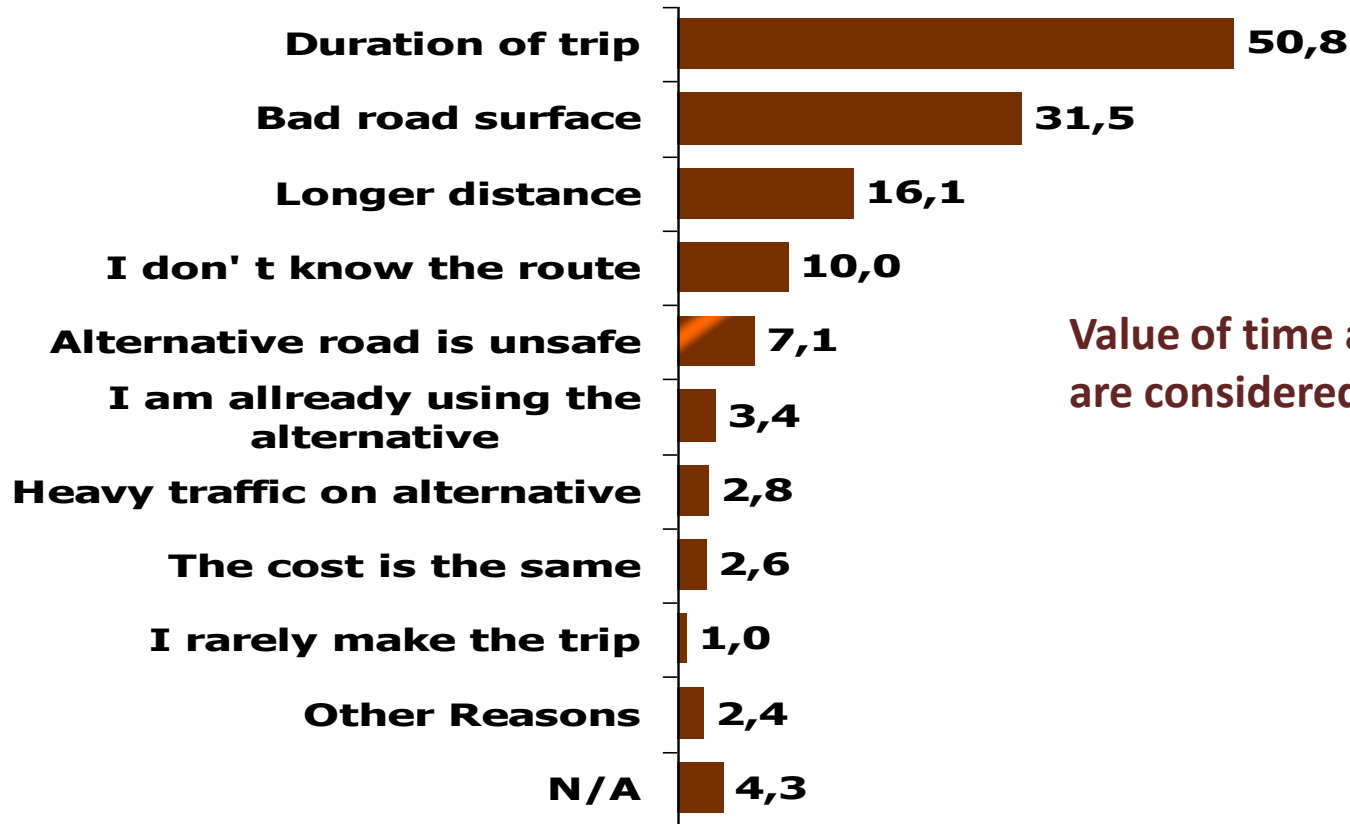
7 out of 10 have used a tolled motorway during the last year

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Survey's Indicative Results

Why use a Tollway when there is a free alternative ?

Q: Why use the Tollway when there is a free alternative ?



Value of time and road safety are considered as key issues.

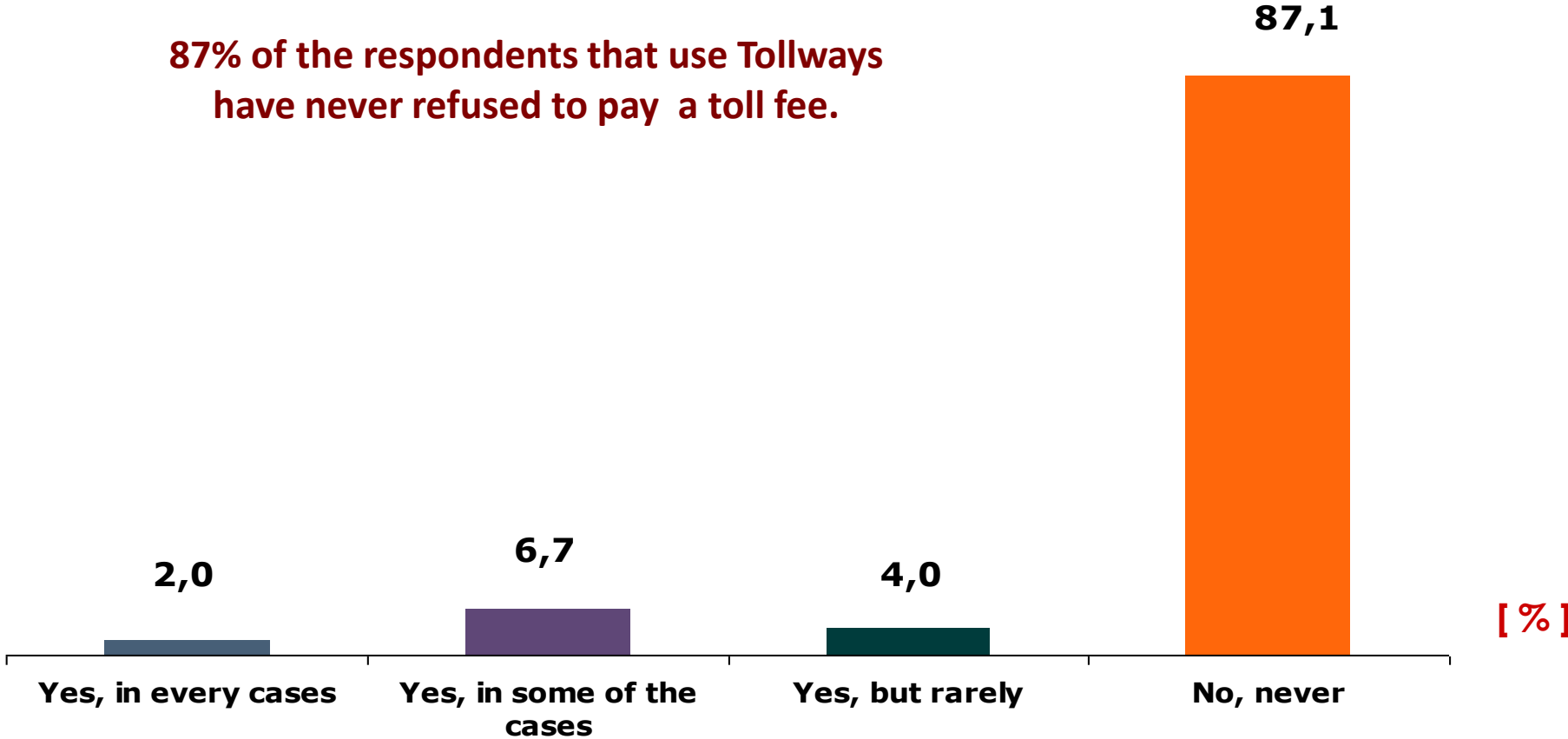
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Survey's Indicative Results

Toll payment refusal

Q: Have you ever refused to pay the toll fee while using a Tollway?

87% of the respondents that use Tollways have never refused to pay a toll fee.



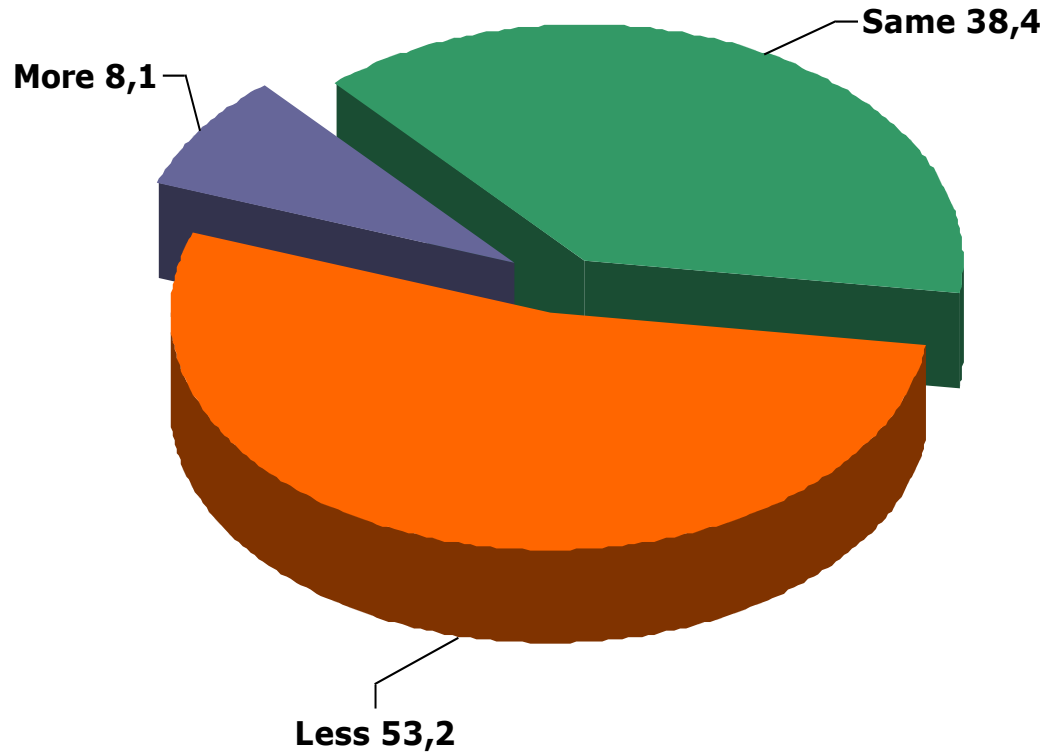
Base: 74% of the citizens that use Tollways



Survey's Indicative Results

Significant traffic reduction. Choice or Consequence ?

Q: Today are you using your vehicle more, less or the same as twelve months ago?

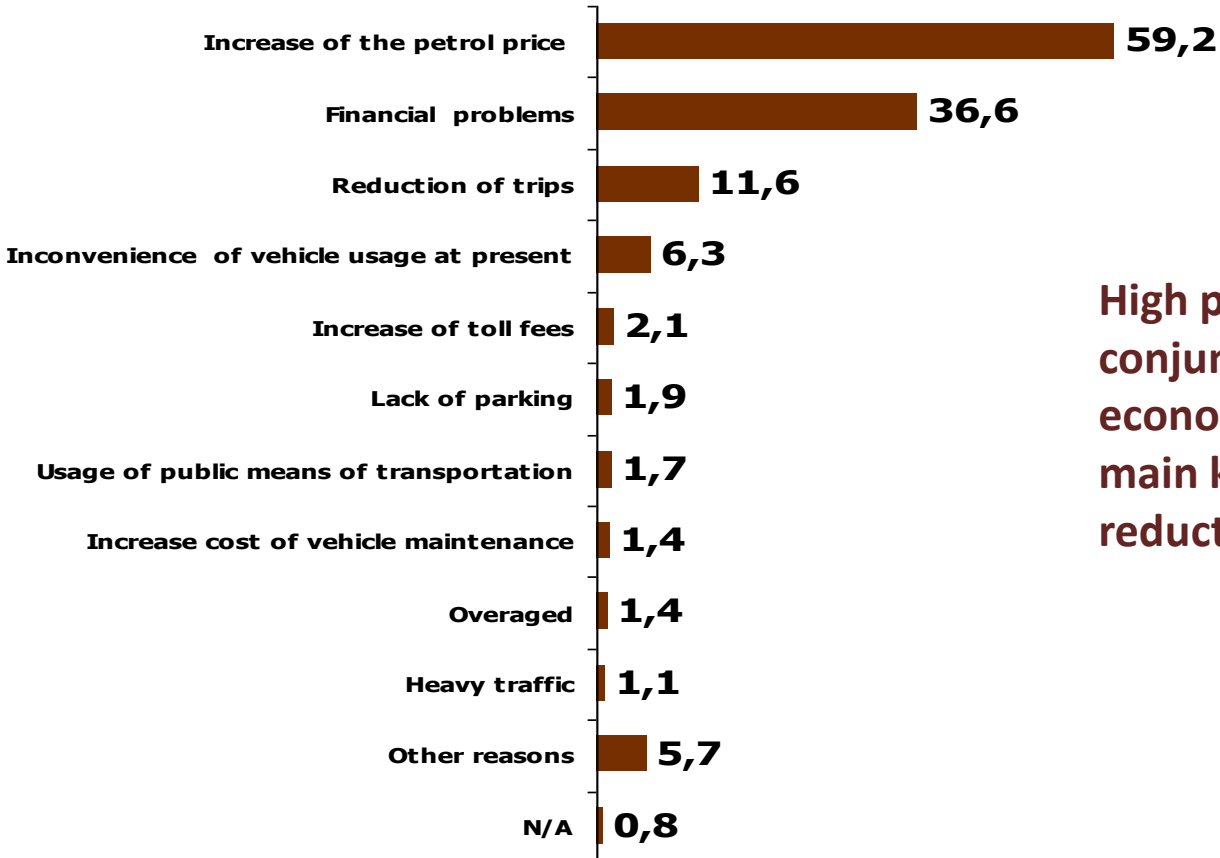


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Survey's Indicative Results

Significant traffic reduction. Choice or Consequence ?

Q: What reasons caused the reduction of usage?



High petrol prices in conjunction with current economic conditions are the main key drivers for traffic reduction.

[%]



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THANK YOU!



The results of this survey are available
on our site www.invision.gr

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