Public Opinion Survey for Motorway Infrastructure and Road Safety

Presentation of Results

By:
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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:

<table>
<thead>
<tr>
<th>Research Company:</th>
<th>Metron Analysis S.A. for InVision Consulting S.A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research type:</td>
<td>Telephone survey</td>
</tr>
<tr>
<td>Sample:</td>
<td>1,503 drivers aged 18+</td>
</tr>
<tr>
<td>Area covered:</td>
<td>Nationwide (all 6 regions of Greece)</td>
</tr>
<tr>
<td>Weights:</td>
<td>Sex, Age and Urbanity</td>
</tr>
<tr>
<td>Statistical Error:</td>
<td>2.5%</td>
</tr>
</tbody>
</table>
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.
Q: What is the contribution of the motorways that are under improvement and development to:

- **Road Safety**: 95.8% Positive, 1.2% Negative, 3.5% Not at all, 0% N/A
- **Quality of citizens' life**: 89.1% Positive, 3.5% Negative, 5.3% Not at all, 0% N/A
- **Job creation**: 84.5% Positive, 3.0% Negative, 9.2% Not at all, 3.3% N/A
- **Economy of the country**: 70.9% Positive, 13.6% Negative, 8.6% Not at all, 6.9% N/A
- **Environment**: 52.2% Positive, 26.2% Negative, 13.6% Not at all, 8.0% N/A
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?

<table>
<thead>
<tr>
<th>Service</th>
<th>Very (%)</th>
<th>Rather (%)</th>
<th>Not so (%)</th>
<th>Not at all (%)</th>
<th>Do not know (%)</th>
<th>Importance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road surface and infrastructure maintenance to drive safely under any weather condition</td>
<td>81,2</td>
<td>13,5</td>
<td>32,1</td>
<td></td>
<td></td>
<td>94,7%</td>
</tr>
<tr>
<td>Road assistance in case of accident or breakdown</td>
<td>66,3</td>
<td>27,5</td>
<td>43,1</td>
<td></td>
<td></td>
<td>93,8%</td>
</tr>
<tr>
<td>Road safety patrols to handle incidents</td>
<td>59,7</td>
<td>30,4</td>
<td>5,2</td>
<td>32</td>
<td></td>
<td>90,1%</td>
</tr>
<tr>
<td>Traffic management to handle traffic</td>
<td>44,6</td>
<td>40,4</td>
<td>9,2</td>
<td>34</td>
<td></td>
<td>85,0%</td>
</tr>
<tr>
<td>Displayed Messages to inform and warn drivers</td>
<td>42,8</td>
<td>40,9</td>
<td>11,3</td>
<td>33</td>
<td></td>
<td>83,7%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th></th>
<th>Development of new</th>
<th>Improvement of existing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development of new</td>
<td>72,0</td>
<td>23,6</td>
</tr>
<tr>
<td>Improvement of existing</td>
<td>57,3</td>
<td>26,1</td>
</tr>
</tbody>
</table>

96% of the citizens consider important the improvement of the existing motorways and 83% the development of new.
Q: The construction and improvement of major motorways is in progress. Are you in favor or against their completion?

In Favor 97.5%
Against 1.4%
N/A 1.0%
Q: Have you used a tolled motorway during the last year?

Survey’s Indicative Results
To what extent are Tollways being used by motorists?

No 25.7
Yes 74.3

7 out of 10 have used a tolled motorway during the last year
Q: Why use the Tollway when there is a free alternative?

- Duration of trip: 50.8%
- Bad road surface: 31.5%
- Longer distance: 16.1%
- I don't know the route: 10.0%
- Alternative road is unsafe: 7.1%
- I am already using the alternative: 3.4%
- Heavy traffic on alternative: 2.8%
- The cost is the same: 2.6%
- I rarely make the trip: 1.0%
- Other Reasons: 2.4%
- N/A: 4.3%

Value of time and road safety are considered as key issues.
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
Q: Today are you using your vehicle more, less or the same as twelve months ago?

Survey’s Indicative Results
Significant traffic reduction. Choice or Consequence?

More 8,1
Same 38,4
Less 53,2
**Survey’s Indicative Results**

**Significant traffic reduction. Choice or Consequence?**

Q: What reasons caused the reduction of usage?

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of the petrol price</td>
<td>59,2</td>
</tr>
<tr>
<td>Financial problems</td>
<td>36,6</td>
</tr>
<tr>
<td>Reduction of trips</td>
<td>11,6</td>
</tr>
<tr>
<td>Inconvenience of vehicle usage at present</td>
<td>6,3</td>
</tr>
<tr>
<td>Increase of toll fees</td>
<td>2,1</td>
</tr>
<tr>
<td>Lack of parking</td>
<td>1,9</td>
</tr>
<tr>
<td>Usage of public means of transportation</td>
<td>1,7</td>
</tr>
<tr>
<td>Increase cost of vehicle maintenance</td>
<td>1,4</td>
</tr>
<tr>
<td>Overaged</td>
<td>1,4</td>
</tr>
<tr>
<td>Heavy traffic</td>
<td>1,1</td>
</tr>
<tr>
<td>Other reasons</td>
<td>5,7</td>
</tr>
<tr>
<td>N/A</td>
<td>0,8</td>
</tr>
</tbody>
</table>

High petrol prices in conjunction with current economic conditions are the main key drivers for traffic reduction.
Public Opinion Survey
for Motorway Infrastructure
and Road Safety

THANK YOU!

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