CITIES SPEAK

Clean Cities Urban Mobility Barometer 2026

CleanCities

This briefing was written by Clean Cities, hosted by T&E. Clean Cities is Europe's largest network of organisations on a mission to build public support for cities to shift from polluting vehicles to active, shared and electric mobility.

Lead author: Martin Baierl
Contributors: Jens Müller, Anka Sušická, Sarah Clark
Polling: OpinionWay

Acknowledgements

Clean Cities would like to express their gratitude to OpinionWay for undertaking this opinion poll. Clean Cities is solely responsible for the content of and the views expressed in this document.

Summary

Europe's capitals face **growing mobility pressures:** congestion, overstretched public transport, affordability challenges, and the need to make everyday travel cleaner, safer and more reliable. At the same time, autonomous vehicles, including "robotaxis", are being piloted and are expected to arrive in Europe later in 2026, raising questions about what kind of mobility city residents want.

To ground this debate in citizens' views, Clean Cities commissioned **a pan-European survey,** Cities speak: The Clean Cities Urban Mobility Barometer. 8,418 adults were surveyed across nine capitals (Berlin, Brussels, Budapest, London, Madrid, Paris, Rome, Sofia and Warsaw) in November 2025 via online questionnaires. The results are representative for gender, age and area of residence.

A clear message emerges: **people want better public transport** and they want it funded. Across cities and population groups, support is strong for expanding and modernising metro, tram and commuter rail (83%) and for national governments to help cities deliver better services (79%).

Majorities also back **reduced fares for low-income users** (70%) and **converting road space** into bus or tram lanes where it improves speed and reliability (63%). The only proposal that fails to win majority support is raising fares to improve services (32%).

Views on **autonomous vehicles** are far less settled. Across the nine capitals, **public opinion is divided:** 37% support autonomous vehicles circulating in their city, 35% oppose them, and 28% remain undecided. Support ranges from 48% in Sofia to 32% in Madrid. London and Madrid record the highest opposition (38%), suggesting acceptance will depend on real-world impacts on congestion, safety and public space.

Walking (71%) and **public transport** (63%) are the **most frequently used modes**, but the private car (41%) remains a major part of urban travel.

Clean Cities will develop recommendations and convene a public event at the end of March 2026 to discuss how cities can regulate new mobility services in the public interest.

Context and objectives of the survey

Most European capitals are grappling with a familiar mix of urban mobility pressures: congestion, strained public transport networks, affordability concerns, and the need to make everyday travel cleaner, safer and more reliable.

At the same time, new mobility options such as **autonomous vehicles**, namely so-called "robotaxis", are being piloted and are **set to be introduced in Europe later in 2026,** raising new questions about what kind of mobility European citydwellers want.

Clean Cities commissioned a Pan-European city survey to better understand citizens' attitudes towards potential solutions. A representative sample of urbanites was surveyed nine European capitals: Berlin, Brussels, Budapest, London, Rome, Madrid, Paris, Sofia and Warsaw. Cities were selected to include Western, Central/Eastern and Southern European views.

"Cities speak: The Clean Cities Urban Mobility Barometer" aims to give city residents a voice on urban mobility issues and establish a recurring series of polls on urban mobility.

In particular, this survey explores:

- how frequently people use different transport modes in their city;
- what measures they support to make public transport better and more efficient; and
- how people feel about the idea of autonomous/driverless vehicles circulating in their city

Methodology and sample size

Interview method

Polling was carried out by OpinionWay using a self-administered online questionnaire (CAWI), the study was carried out applying the procedures and rules of **ISO 20252.** The fieldwork took place between 13–25 November 2025.

Sample size

The survey was conducted among 8,418 adults (18+) across nine European capitals:

- Berlin (n=1,047)
- Brussels (n=821)
- Budapest (n=849)
- London (n=1,048)
- Madrid (n=1,000)
- Rome (n=1,000)
- Paris (n=1,002)
- Sofia (n=842)
- Warsaw (n=809)

Representativeness and margin of error

Samples were constructed using the quota method, with **quotas set on gender, age and area of residence** (centre or periphery). This applies to the total sample, and to each city-level sample, which is drawn using the same quota criteria.

Results should be read taking into account **margins of uncertainty.** Assuming 95% confidence intervals, the margin of error is ±1.5 to ±3.5 percentage points for a sample of around 800 respondents and ±1.4 to ±3.1 points for a sample of around 1,000 respondents.

Survey results

We're summarising the main results here, with the full data being made available on our website.

Views on measures to improve public transport

Across all cities polled, a large majority supports better and more efficient public transport. Support is strong across political, age, gender and socioeconomic categories.

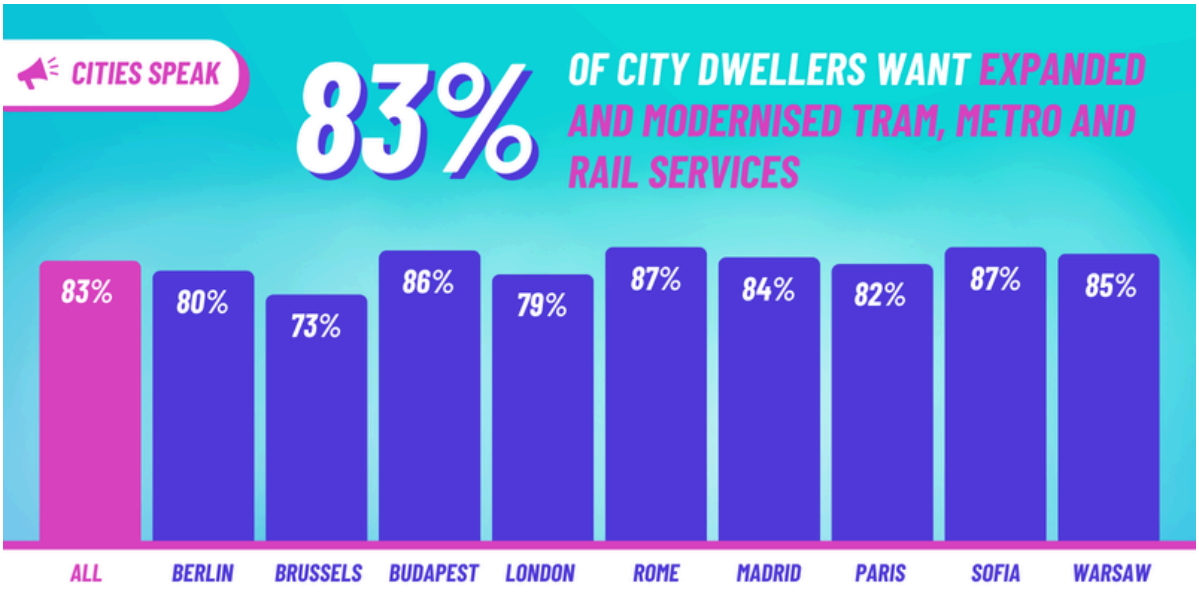
The main findings are:

- Citydwellers overwhelmingly (83%) support **expanding and modernising** metro, tram and commuter rail lines.
- **More than three quarters** (79%) further support **financial support** from national governments for cities to run better public transport.
- 70% back **reduced fares for low-income users.**
- Similarly, almost two thirds (63%) of respondents support **converting road space into bus or tram lanes** if it improves speed and reliability of public transport.
- By contrast, the only measure that is **not supported** by the majority of respondents is **increasing fares** to improve service quality (32% support).

When it comes to measures to improve public transport, there is **little difference across genders.** Support for extending and modernising lines and the creation of bus lanes enjoys strong support in **both city centres and suburbs** but is marginally higher in the centres. On most measures, support is higher from people identifying as left/progressive but a **clear majority of moderates and conservatives** also support them.

Interestingly, when looking at very frequent users of different modes of transport, support for public transport remains strong across all modes, **including very frequent car drivers,** and independently on whether people own a car or not.

While support varies slightly between cities, often influenced by the local public transport context, it is striking that support is **largely consistent across nine distinct cities** in different countries and across all population segments despite strong polarisation on many other (transport) topics.



Source: OpinionWay representative survey for Clean Cities in November 2025 of 8,418 adults from nine European capitals.

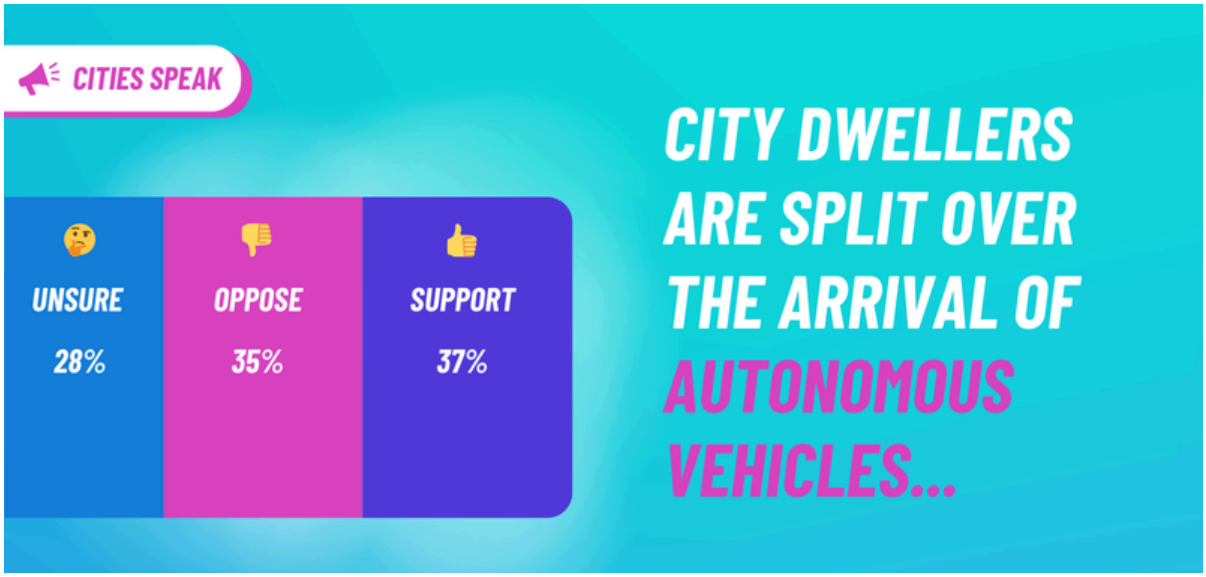
Views on autonomous vehicles

The public opinion in European cities on the rollout of autonomous vehicles, be it in the form of robotaxis, private cars, public transport or delivery robots, is **divided**, with **roughly equally strong support and opposition in most cities.** This suggests that citizens haven't yet made up their mind at the beginning of the year which will see the introduction of the first fully driverless robotaxi services in selected European cities.

The main findings are:

- Across the nine cities, **37% would agree** to have autonomous vehicles (e.g. driverless cars, robotaxis, public buses, delivery robots) circulating in their city. A similar yet slightly smaller share of the population **(35%) is opposed,** and a large group of **28% remains undecided.**
- Support ranges from as high as 48% in Sofia to as low as 32% in Madrid.
- London, likely the first of the nine polled cities to see robotaxis operating, has, together with Madrid, the highest level of opposition (38%).

The results show that a large share of the population remains undecided and suggests that public acceptance will likely be affected by the (perceived) effects of the services' introduction on congestion, road safety, use of parking and public space, among other factors.



Source: OpinionWay representative survey for Clean Cities in November 2025 of 8,418 adults from nine European capitals.

Use of different modes of travel

When asked **how often they use different modes of transport on a typical day,** respondents report that walking and public transport, but also the private car, are at the heart of urban mobility in Europe's cities.

- Across the nine polled cities, walking (71%) and public transport (63%) are the most frequently used modes of transport.
- The private car follows third with 41% of respondents indicating that they use it frequently.
- Bikes (16%), e-bikes (10%) and motorcycles, scooters and mopeds (10%) come fourth to sixth.

Outlook

2026 will be a pivotal year for urban transport in Europe. As public transport systems face mounting financial pressure and the first robotaxi services begin operating in select cities, the **need for swift and effective regulation will be critical.** Policymakers must closely monitor real-world impacts and remain ready to adjust course to safeguard public interest, equity, and sustainability.

In this context, **Clean Cities is developing concrete recommendations** and will convene a **public event at the end of March 2026** to examine the implications for cities and to explore regulatory pathways that can ensure new mobility services support, rather than undermine, urban transport goals.

Contacts

Barbara Stoll
Director, Clean Cities
barbara.stoll@cleancitiescampaign.org

Jens Müller
Deputy Director, Clean Cities
jens.mueller@cleancitiescampaign.org

Find out more

Clean Cities is Europe's largest network of organisations on a mission to build public support for cities to shift from polluting cars to active, shared and electric mobility.

www.cleancitiescampaign.org
info@cleancitiescampaign.org

CleanCities