

toluna   harris  
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# Megatrucks perception survey

*European report* 



May 2024

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# Survey methodology

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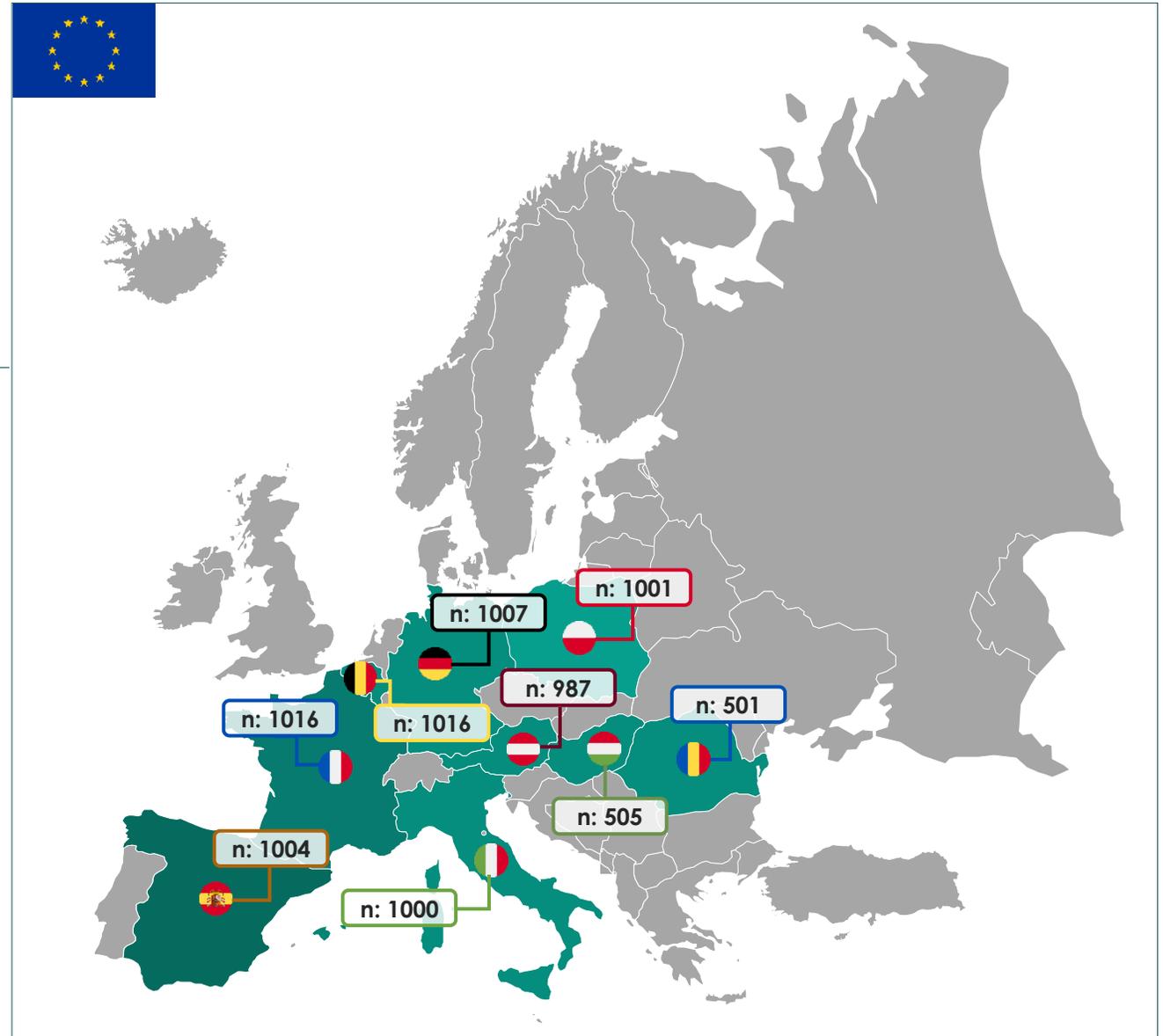
# Méthodologie

8 037 online interviews

9 countries

*National representative samples:  
gender, age, professional category  
and region*

Fieldwork from 18<sup>th</sup> to 23<sup>rd</sup> April 2024



# Reading notes

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## Reading the results

Results are presented on respondent bases (total or filtered questions).

They could be presented whether on:

- Total sample including the 9 countries
- Country sample



The following symbol indicates an open question

## Significant differences

**Results significantly above average (of European countries, all ages, all incomes...)**

**Results significantly below average (of European countries, all ages, all incomes...)**

*The significance threshold for this study was set at 95%. For each significant difference (positive or negative), there is at least a 95% probability that the difference is well established.*

# Detailed results

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# 1. The issue of megatrucks and gigaliners traffic: a little-known subject

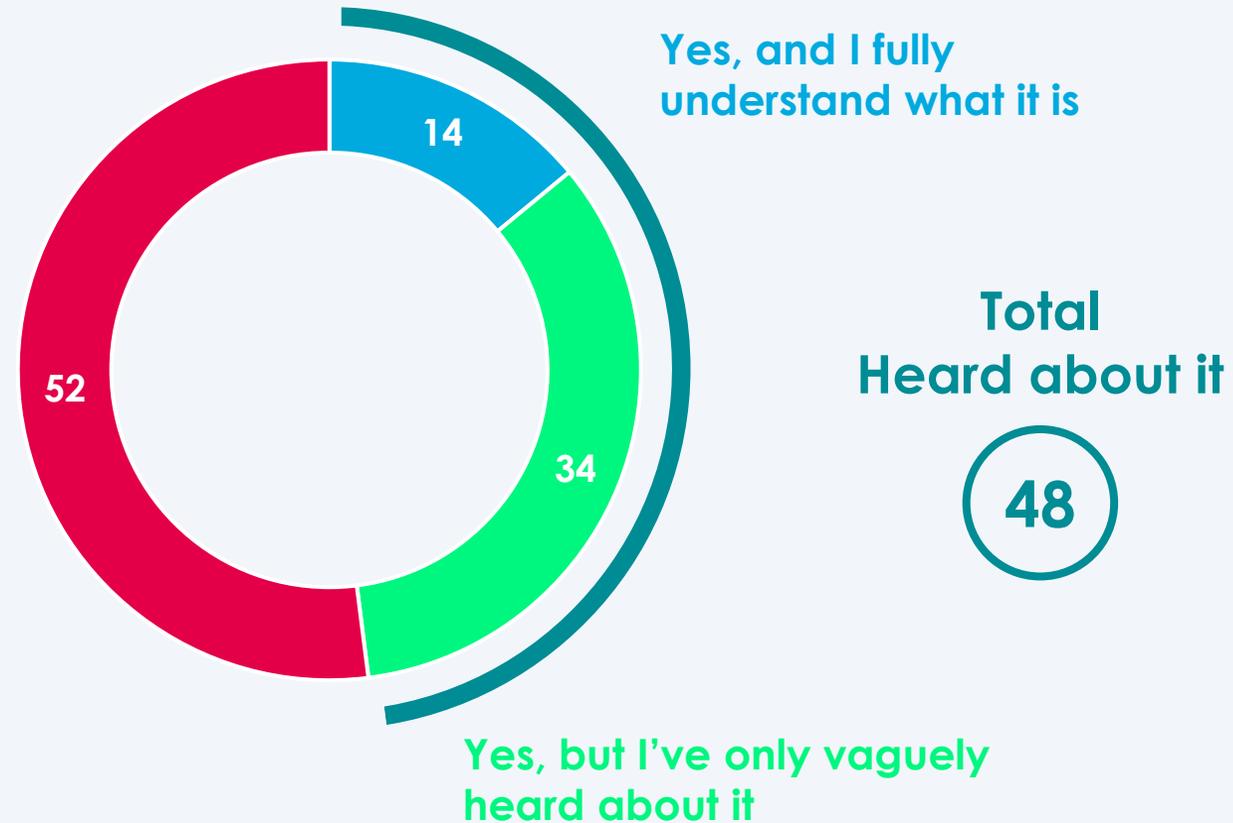
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# A little-known subject: only one out of two Europeans has ever heard of a new regulation on megatrucks, and less than 15% have a precise idea of its content.

- To all – In %



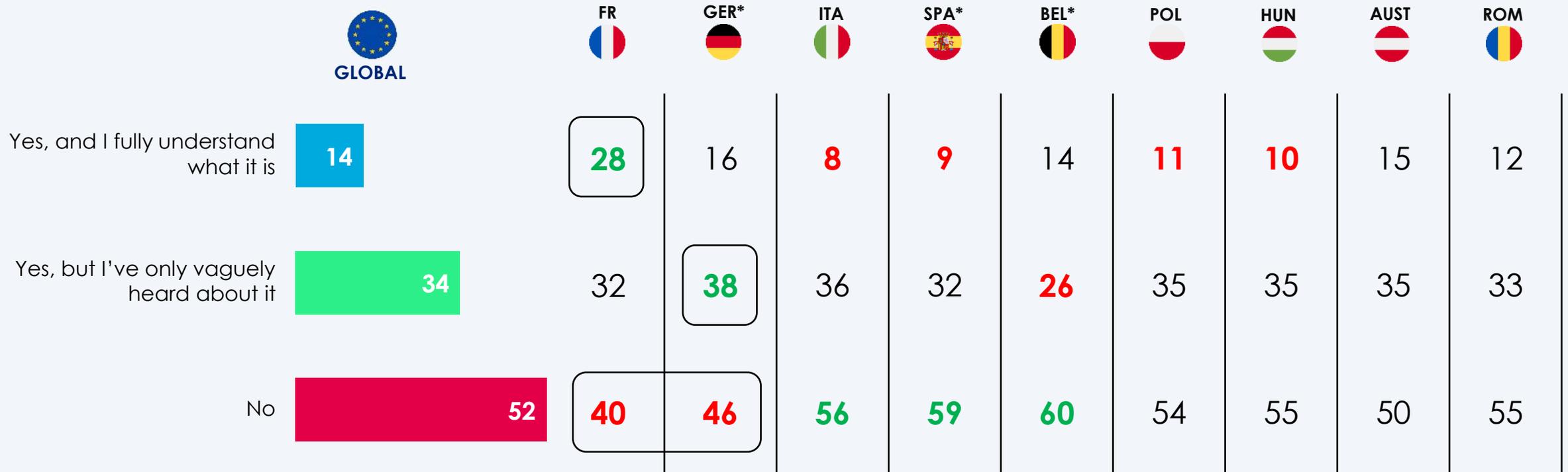
GLOBAL



# In detail, the French and Germans have heard more about it than Italians, Spanish and Belgians (in the latter two countries it is already authorized).

- To all – In %

\*In Germany, Belgium and Spain, megatrucks are already authorized or in the experimental phase



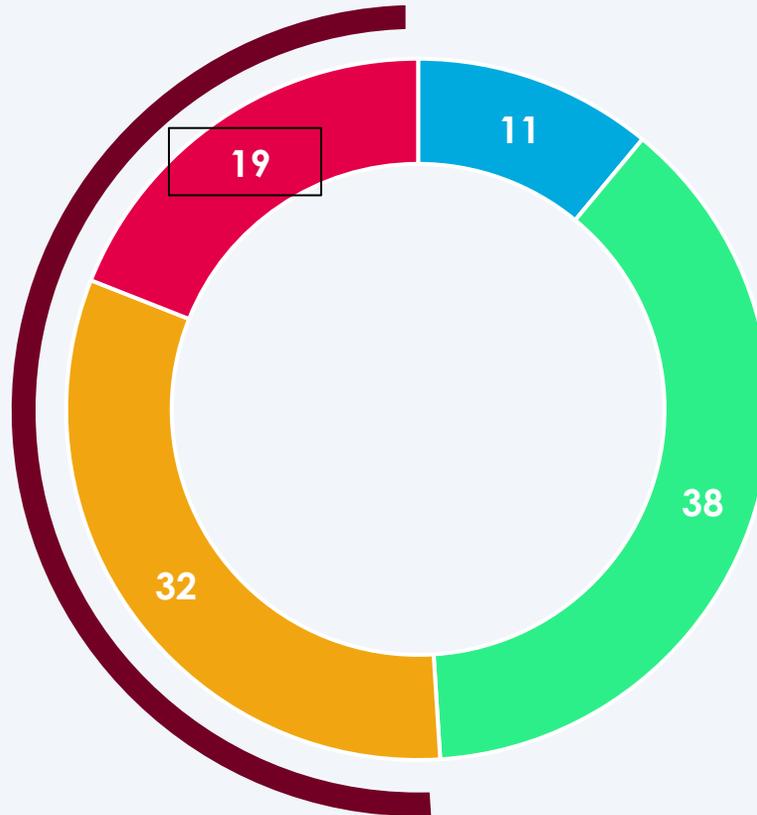
# One out of two Europeans is opposed to megatrucks but this figure conceals disparities between countries.

- To all - In %



Total Opposed to megatrucks

51

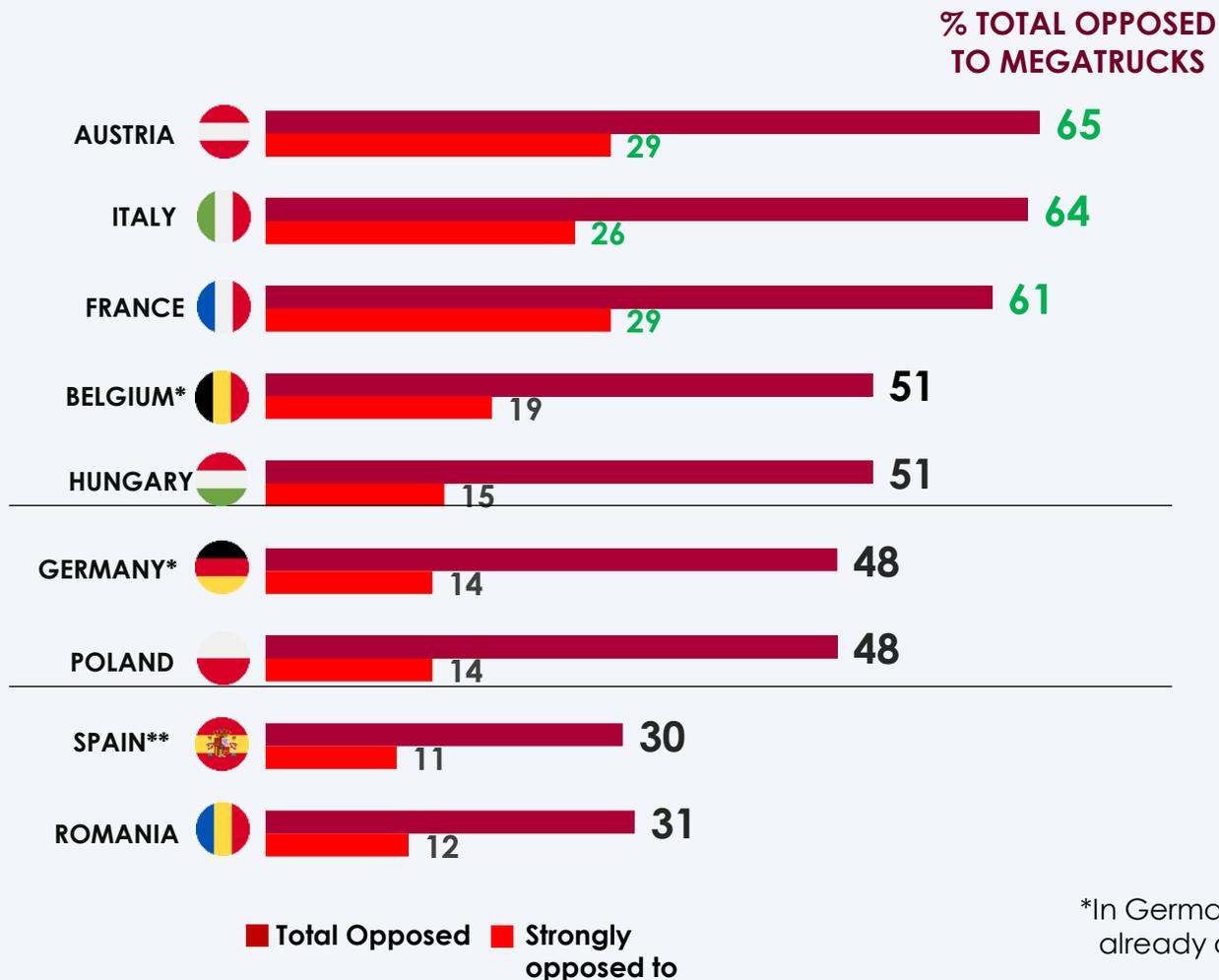


■ Strongly in favour of it ■ Somewhat in favour of it ■ Somewhat opposed to it ■ Strongly opposed to it

# Out of 9 countries, 5 populations are opposed. Opposition is the strongest and most solid in France, Italy and Austria (% “very unfavourable” close to 30%)

- To all – In %

  
 GLOBAL  
**51%**



\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# REFRESHER FOR ALL

- To all – In %

***A directive that is currently under discussion at the EU level seeks to allow longer and heavier vehicles (LHVs), i.e. “megatrucks or gigaliners” measuring over 25 m in length and up to 60 tons in weight (with two trailers instead of one) to cross the borders of EU member states and potentially, in time, travel on roads in EU countries.***



Megatrucks or gigaliners: a difference of height and weight

Between 16.50m and 18.75m  
44 tons max



Between 25.25m and 32m  
60 tons max



**2. After exposure to the consequences of the introduction of megatrucks, a large majority view it in a negative light**

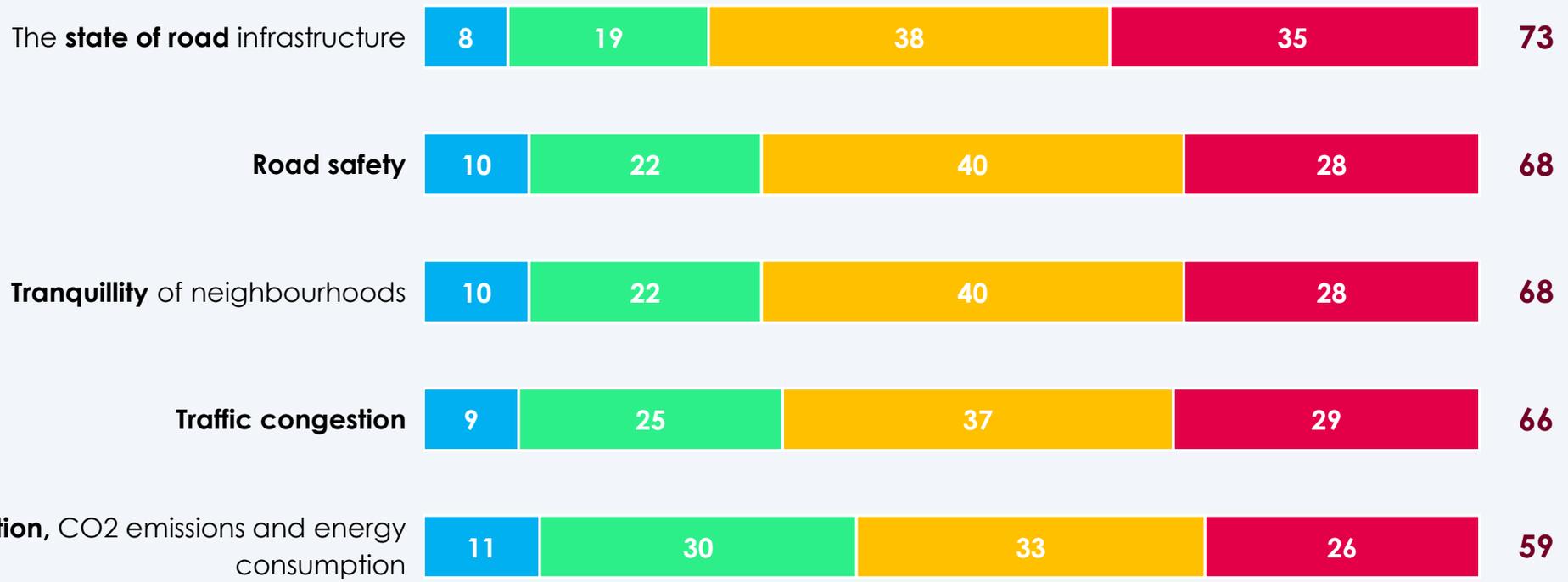
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# Between two thirds and three quarters see the introduction of megatrucks is generally seen as a bad thing, especially for the state of road infrastructure, traffic and road safety, and the peace and quiet of neighborhoods

- To all - In %



Total Bad thing



■ A very good thing      ■ Somewhat of a good thing  
■ Somewhat of a bad thing      ■ A very bad thing

# While the state of road infrastructure is a real point of tension in all countries, traffic congestion is also an issue of 1<sup>st</sup> order in Hungary and Spain\* and the impact on pollution levels is also given greater consideration in Romania and France

- To all – In %

										
	Total Mauvaise chose	FR	GER*	ITA	SPA*	BEL*	POL	HUN	AUST	ROM
The state of road infrastructure	<b>73</b>	75 1	75 1	<b>78</b> 1	<b>65</b> 1	75 1	<b>66</b> 1	74 1	<b>81</b> 1	<b>69</b> 1
Road safety	<b>68</b>	<b>73</b> 3	68 2	<b>78</b> 2	<b>61</b> 3	68 2	<b>61</b> 3	70	<b>75</b> 2	<b>60</b>
Tranquillity of neighbourhoods	<b>68</b>	<b>74</b> 2	<b>65</b> 3	<b>76</b>	<b>60</b>	<b>64</b> 3	<b>64</b> 2	<b>75</b> 2	<b>73</b>	<b>64</b> 2
Traffic congestion	<b>66</b>	67	<b>61</b>	<b>78</b> 3	<b>62</b> 2	<b>62</b>	<b>56</b>	<b>79</b> 1	<b>75</b> 3	63
Levels of pollution, CO2 emissions and energy consumption	<b>59</b>	<b>64</b>	<b>52</b>	<b>68</b>	<b>56</b>	<b>52</b>	<b>54</b>	<b>70</b>	59	<b>64</b> 3
The development of freight transport by train, boat...	<b>50</b>	<b>47</b>	<b>58</b>	<b>55</b>	48	<b>45</b>	<b>40</b>	<b>57</b>	<b>64</b>	<b>32</b>

\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

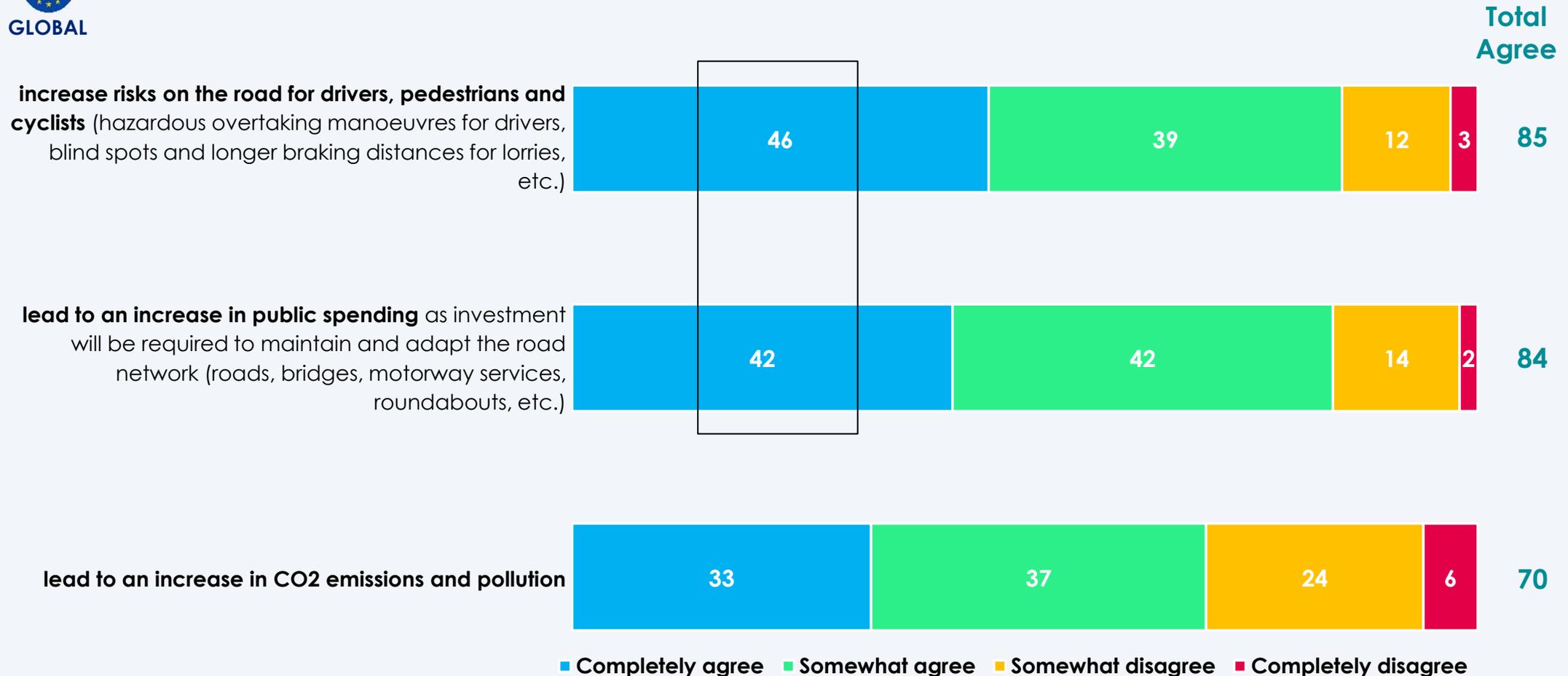
# For more than 8 out of 10 Europeans, the use of megatrucks could lead to major risks on the roads and an increase in public spending

- To all – In %



GLOBAL

IF MEGATRUCKS ARE AUTHORISED THIS WILL...



# Fears are even more acute in France, Italy, Hungary and Romania

- To all – In %

IF MEGATRUCKS ARE AUTHORISED THIS WILL...

	 Total	 FR	 GER*	 ITA	 SPA*	 BEL*	 POL	 HUN	 AUST	 ROM
increase risks on the road for drivers, pedestrians and cyclists	<b>85</b>	<b>88</b>	<b>81</b>	<b>88</b>	84	87	<b>83</b>	86	86	<b>88</b>
lead to an increase in public spending as investment will be required to maintain and adapt the road network	<b>84</b>	<b>86</b>	<b>80</b>	84	<b>81</b>	83	81	<b>88</b>	86	<b>88</b>
lead to an increase in CO2 emissions and pollution	<b>70</b>	<b>79</b>	<b>60</b>	73	71	<b>62</b>	72	<b>77</b>	69	<b>79</b>

\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# Three quarters of Europeans believe that megatrucks could weaken rail freight transport

- To all – In %



IF MEGATRUCKS ARE AUTHORISED THIS WILL...

**weaken rail freight transport** since it costs freight carriers less to transport goods by road



■ Completely agree ■ Somewhat agree ■ Somewhat disagree ■ Completely disagree

# Opinions are even sharper in France and Italy

- To all – In %

IF MEGATRUCKS ARE AUTHORISED THIS WILL...

	 Total	 FR	 GER*	 ITA	 SPA*	 BEL*	 POL	 HUN	 AUST	 ROM
weaken rail freight transport since it costs freight carriers less to transport goods by road	<b>75</b>	<b>80</b>	<b>70</b>	<b>77</b>	75	<b>71</b>	72	76	74	75

\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# Authorising megatrucks could increase road freight traffic according to more than half of Europeans

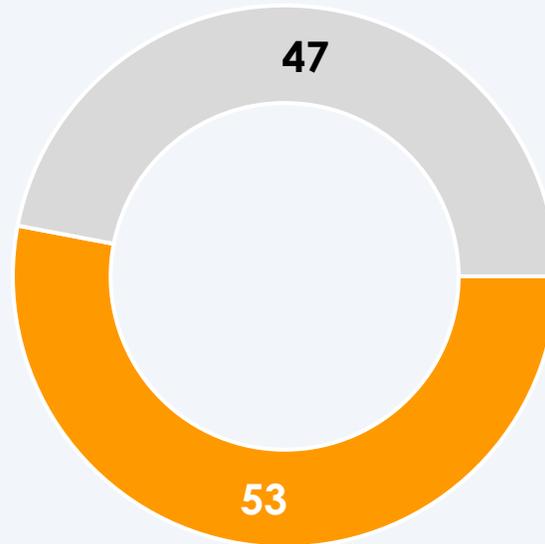
- To all – In %



## IF MEGATRUCKS ARE AUTHORISED THIS WILL...

*Likely reduce the number of journeys required to transport goods in Europe since megatrucks will be able to transport more goods*

*Likely increase freight traffic on roads since carriers will prefer to transport goods by road rather than by train*

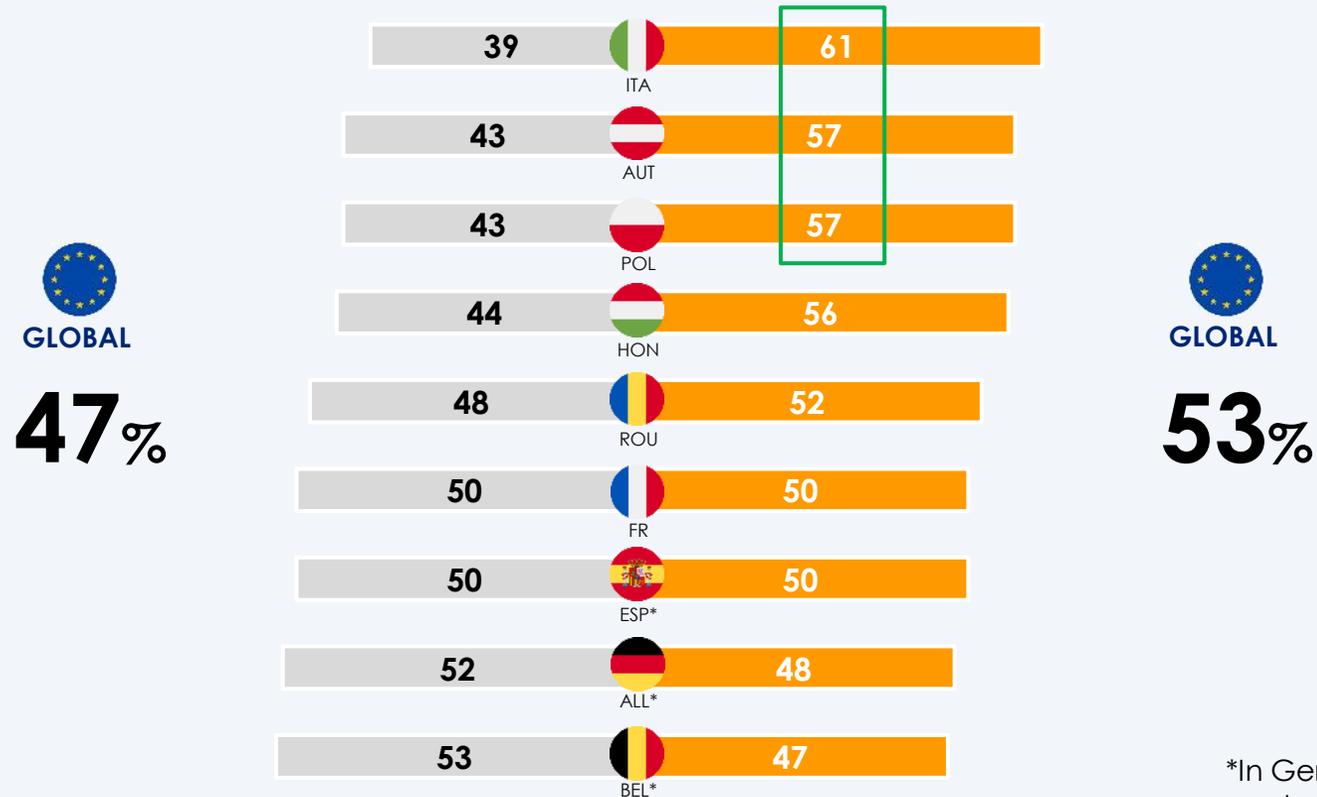


# More Italians, Austrians and Poles think that megatrucks will increase road freight traffic

- To all – In %

**% Likely reduce the number of journeys** required to transport goods in Europe since megatrucks will be able to transport more goods

**% Likely increase freight traffic** on roads since carriers will prefer to transport goods by road rather than by train



\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

**3. In comparison with megatrucks, the development of freight or combined road-rail transport is widely favoured**

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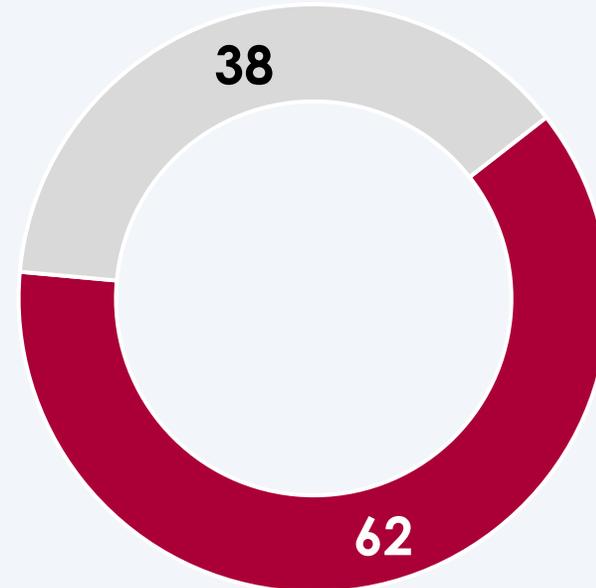
# For 6 out of 10 Europeans, the use of megatrucks should not be authorised in countries where rail transport or combined road-rail transport is developed

- To all – In %



**The use of megatrucks should be authorised in all countries** in order to standardise road transportation across the European Union; their use is already authorised in some member states

Countries in which goods are transported by rail (or by rail and road) **should not authorise the use of megatrucks**

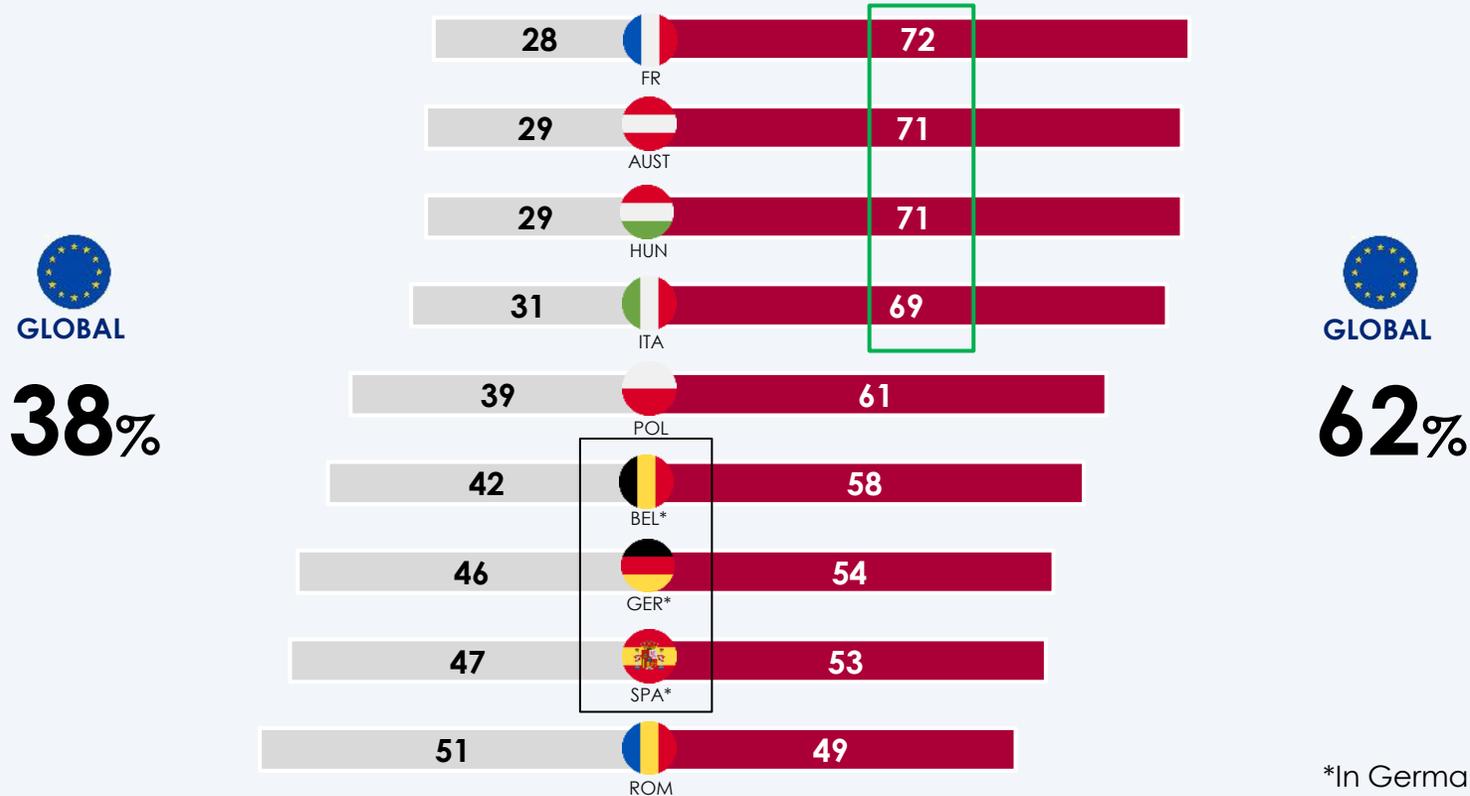


# French, Austrians, Hungarians and Italians are more opposed to the use of megatrucks in countries where goods are transported by rail or combined road-rail transport, an opinion also shared by a majority of citizens in countries where they are already authorized

- To all – In %

**% The use of megatrucks should be authorised in all countries** in order to standardise road transportation across the European Union; their use is already authorised in some member states

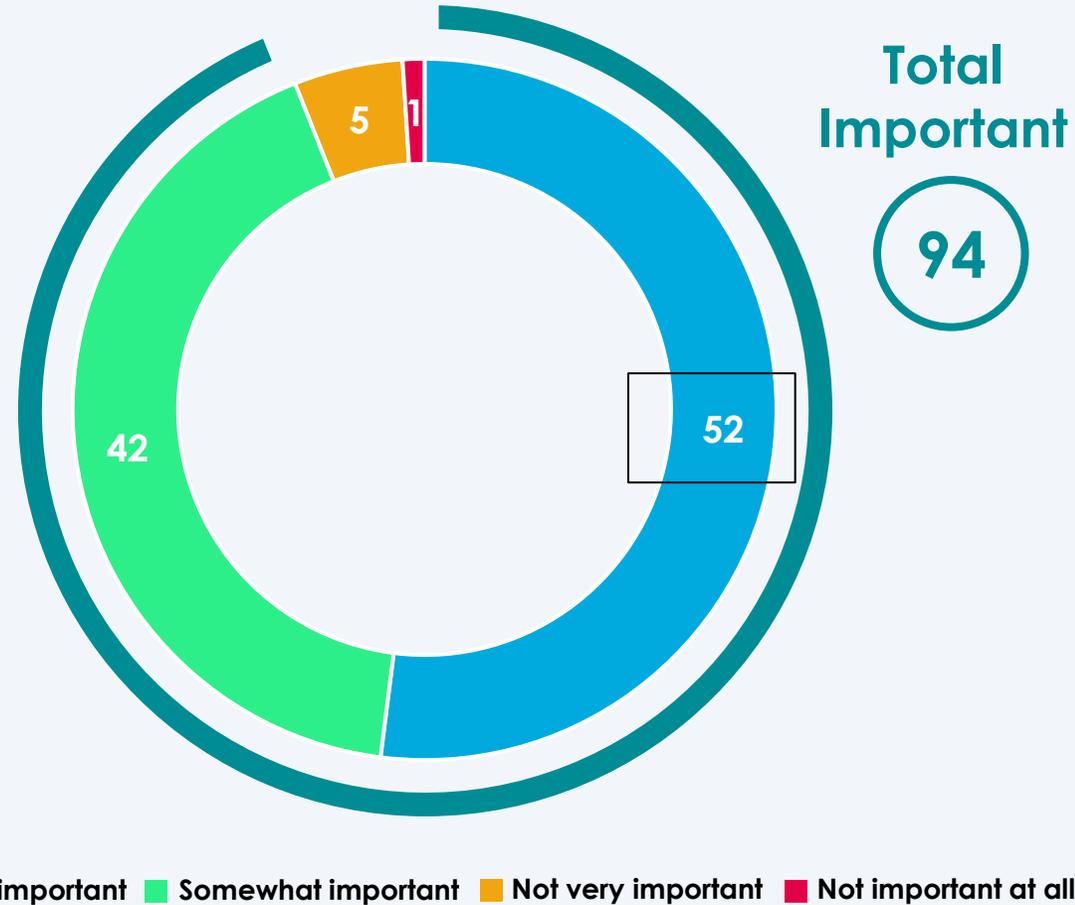
**% Countries in which goods are transported by rail (or by rail and road) should not authorise the use of megatrucks**



\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# A very large majority of Europeans think it is important to develop freight or combined road-rail transport (half of them think it is “very important”)

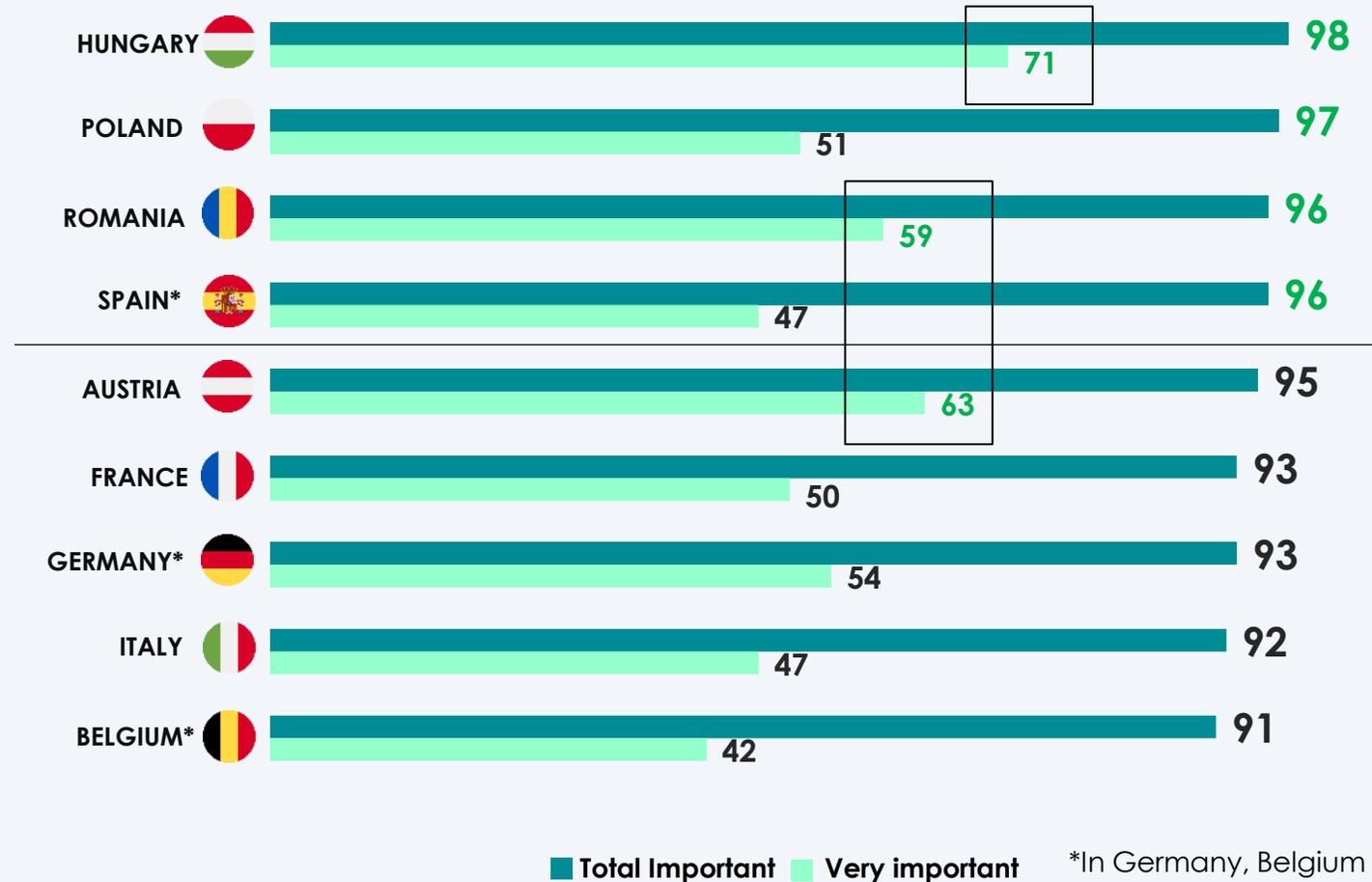
- To all – In %



# The development of freight or combined road-rail transport appears to be even more important in Hungary, Romania and Austria

- To all - In %

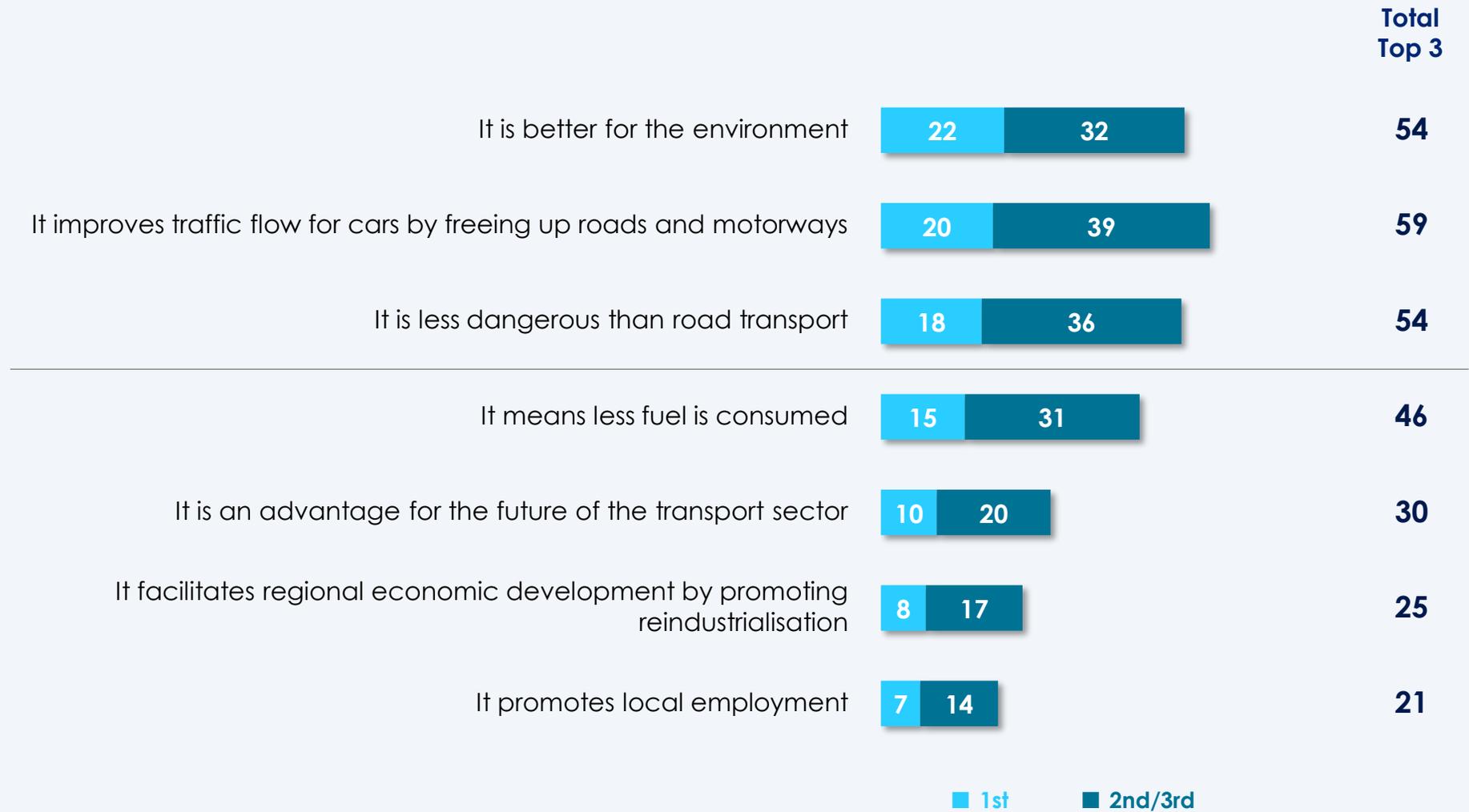
  
 GLOBAL  
**TOTAL IMPORTANT 94%**  
**VERY IMPORTANT 52%**



\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# Key reasons : freight or combined road-rail transport is more environmentally friendly it is safer and avoids traffic jams

- To those who think it is important to develop rail freight transport – In %



# Differences between countries : the ecological aspect is more emphasized in France and traffic fluidity more in Belgium, Hungary and Austria

- To those who think it is important to develop rail freight transport – In %

										
	Top1	FR	GER*	ITA	SPA*	BEL*	POL	HUN	AUST	ROM
It is better for the environment	<b>22</b>	<b>29</b>	<b>20</b>	22	<b>19</b>	23	21	25	22	21
It improves traffic flow for cars by freeing up roads and motorways	<b>20</b>	<b>15</b>	22	22	<b>17</b>	<b>23</b>	<b>16</b>	<b>26</b>	<b>23</b>	20
It is less dangerous than road transport	<b>18</b>	16	<b>14</b>	20	20	19	20	16	17	18
It means less fuel is consumed	<b>15</b>	15	15	<b>18</b>	14	<b>11</b>	17	13	17	<b>12</b>
It is an advantage for the future of the transport sector	<b>10</b>	9	<b>12</b>	8	10	9	11	10	8	<b>13</b>
It facilitates regional economic development by promoting reindustrialisation	<b>8</b>	9	8	<b>6</b>	<b>12</b>	7	7	<b>4</b>	<b>6</b>	10
It promotes local employment	<b>7</b>	7	<b>9</b>	<b>4</b>	8	8	8	6	7	6

\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# German citizens cited more arguments in favour of the development of freight or combined road-rail transport

- To those who think it is important to develop rail freight transport – In %

	 <b>Top3</b>	 FR	 ALL*	 ITA	 ESP*	 BEL*	 POL	 HON	 AUT	 ROUM
It improves traffic flow for cars by freeing up roads and motorways	<b>59</b>	<b>55</b>	58	<b>63</b>	<b>51</b>	<b>67</b>	<b>55</b>	<b>66</b>	60	58
It is better for the environment	<b>54</b>	<b>60</b>	51	55	<b>47</b>	56	53	57	57	<b>49</b>
It is less dangerous than road transport	<b>54</b>	53	<b>37</b>	<b>62</b>	52	<b>59</b>	54	<b>61</b>	54	57
It means less fuel is consumed	<b>46</b>	44	<b>49</b>	<b>50</b>	48	<b>35</b>	<b>50</b>	42	<b>53</b>	<b>36</b>
It is an advantage for the future of the transport sector	<b>30</b>	30	<b>35</b>	<b>27</b>	33	30	32	32	<b>26</b>	27
It facilitates regional economic development by promoting reindustrialisation	<b>25</b>	<b>29</b>	<b>28</b>	<b>19</b>	<b>35</b>	24	23	<b>17</b>	<b>20</b>	<b>31</b>
It promotes local employment	<b>21</b>	20	<b>27</b>	<b>15</b>	<b>25</b>	19	23	<b>14</b>	<b>18</b>	<b>26</b>

\*In Germany, Belgium and Spain, megatrucks are already authorised or in the experimental phase

# Appendices

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# Samples detailed structure (1/2)

	n: 1016		n: 1007		n: 1000		n: 1004		n: 1016		n: 1001		n: 505		n: 987		n: 501	
	FR		GER		ITA		SPA		BEL		POL		HUN		AUST		ROM	
Weighted samples	Eff	%	Eff	%	Eff	%	Eff	%										
<b>GENRE</b>																		
Male	485	48%	493	49%	482	48%	487	48%	496	49%	478	48%	238	47%	481	49%	242	48%
Female	531	52%	514	51%	518	52%	517	52%	520	51%	523	52%	267	53%	506	51%	259	52%
<b>AGE</b>																		
18 - 24	107	11%	91	9%	82	8%	85	8%	103	10%	89	9%	46	9%	93	10%	45	9%
25 - 34	153	15%	153	15%	128	13%	137	14%	165	16%	173	17%	79	16%	163	16%	77	15%
35 - 49	243	24%	224	22%	249	25%	287	29%	249	25%	279	28%	140	28%	241	24%	139	28%
50 - 64	245	24%	277	28%	265	26%	256	25%	256	25%	237	24%	118	23%	263	27%	123	25%
65 +	268	26%	262	26%	276	28%	239	24%	243	24%	223	22%	122	24%	227	23%	117	23%
<b>CSP</b>																		
PCS+	292	29%	302	30%	213	21%	220	22%	287	28%	282	28%	121	24%	282	29%	121	24%
PCS-	312	31%	282	28%	230	23%	269	27%	236	23%	236	24%	153	30%	285	29%	143	29%
Inactives	412	40%	423	42%	557	56%	515	51%	493	49%	483	48%	231	46%	420	42%	237	47%

# Samples detailed structure (2/2)



Weighted samples

	Eff	%	Eff	%	Eff	%	Eff	%
<b>REGION</b>								
Nord-Est	232	23%						
Nord-Ouest	234	23%						
Région parisienne	184	18%						
Sud-Est	252	25%						
Sud-Ouest	114	11%						
Baden-Württemberg			134	13%				
Bayern			159	16%				
Berlin			44	4%				
Brandenburg			31	3%				
Bremen			8	1%				
Hamburg			22	2%				
Hessen			76	8%				
Mecklenburg-Vorpommern			20	2%				
Niedersachsen			97	10%				
Nordrhein-Westfalen			216	21%				
Rheinland-Pfalz			50	5%				
Saarland			12	1%				
Sachsen			50	5%				
Sachsen-Anhalt			27	3%				
Schleswig-Holstein			35	3%				
Thüringen			26	3%				
Nord-Ovest					269	27%		
Nord-Est					195	19%		
Centro (IT)					199	20%		
Sud					228	23%		
Isole					109	11%		
Noroeste							95	9%
Noreste							96	10%
Comunidad de Madrid							142	14%
Centro							119	12%
Este							293	29%
Sud							211	21%
Canarias							48	5%



Weighted samples

	Eff	%	Eff	%	Eff	%	Eff	%	Eff	%	
<b>REGION</b>											
Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest	104	10%									
Vlaams Gewest	591	58%									
Région wallonne	321	32%									
Makroregion Poludniowy					207	21%					
Makroregion Północno-Zachodni					161	16%					
Makroregion Poludniowo-Zachodni					102	10%					
Makroregion Północny					151	15%					
Makroregion Centralny					98	10%					
Makroregion Wschodni					141	14%					
Makroregion Województwo Mazowieckie					141	14%					
Közép-Magyarország							157	31%			
Dunántúl							152	30%			
Alföld és Észak							196	39%			
Ostösterreich									432	44%	
Südösterreich									203	20%	
Westösterreich									352	36%	
Macroregiunea unu										125	25%
Macroregiunea doi										141	28%
Macroregiunea trei										138	27%
Macroregiunea patru										97	20%

## Contacts

Please note that any **distribution of these results** must be accompanied by the following technical details: the **name of the institute**, the **name of the study sponsor**, **survey method**, **dates** and **sample size**.

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