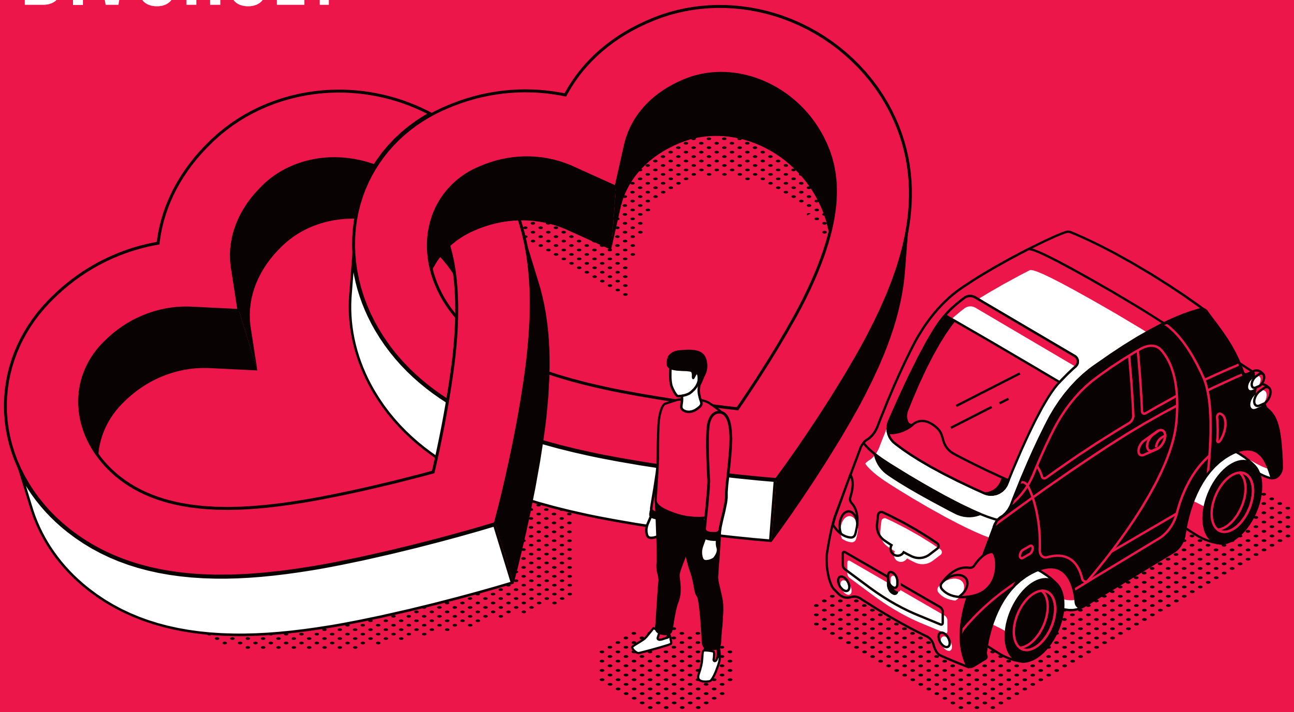
AUTO 2021

CARS:
AN IMPOSSIBLE DIVORCE?



An international survey
conducted in 15 countries

CONSORS FINANZ
BNP PARIBAS

EDITORIAL

Meaning in the crisis: The coronavirus and the mobility transition

Not so long ago, ownership of an automobile was a matter of prestige and passion. Today, however, for many parts of the population, the car has lost its relevance as a status symbol: the use of a car is becoming more important than its ownership.

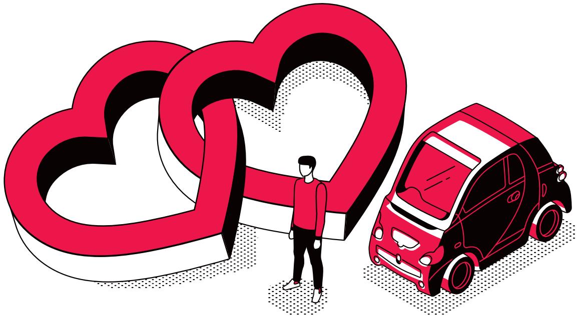
The mobility transition: What does the general consumer awareness look like?

In this year's study results, Consors Finanz demonstrates that even during the COVID-19 crisis, the consumers' awareness for social change and thus also for a global mobility transition has continued to grow. Intensive discussions about the reallocation of public space, more environmentally compatible mobility solutions and the interconnection of different forms of mobility have already begun.

Yet, for almost half of the respondents, there is currently still no genuine alternative to private car ownership. Moreover, in times of great uncertainty, it provides many respondents with a sense of security.

Electro mobility: The winner in the crisis

During the coronavirus crisis in particular, consumers have become increasingly aware of environmentally friendly types of mobility. Electric cars and hybrid vehicles emerge as the winners in the crisis in this sector.



Nevertheless, it is too early to speak of a breakthrough in the market. One reason for this is the lack of available purchasing power: environmentally friendly cars are currently too expensive for many people to buy. Government support would be very welcome here.

Our survey will put you in the picture as to where consumers stand in their relationship to the automobile, the importance of electro mobility and environmental protection, which financial obstacles respondents are facing, and what their expectations of policy makers look like.

I hope you will enjoy reading and gain many interesting insights from our survey.

Gerd Hornbergs
CEO Consors Finanz

PARTNERS & METHODOLOGY

All economic and marketing analyses, as well as forecasts, were performed in conjunction with the survey and consulting firm **C-Ways**, a specialist in Anticipation Marketing.

Quantitative consumer interviews were conducted by **Harris Interactive on 2-11 September 2020 in 15 countries:** South Africa, Germany, Belgium, Brazil, China, Spain, United States, France, Italy, Japan, Netherlands, Poland, Portugal, United Kingdom and Turkey. In total, 10,000 individuals were interviewed online (CAWI method). These individuals, aged 18 to 65, were drawn from national samples representative of each country. The quota method was employed to ensure that the sample was representative (gender and age). 3,000 interviews were conducted in France and 500 in each of the other countries.

Co-written by: Luc Charbonnier and C-Ways
Editorial coordination: Patricia Bosc
Design: © Altavia Cosmic
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THE AUTOMOTIVE INDUSTRY: IN THE EYE OF EVERY STORM

Having long been the symbol of economic development, social progress and success in general, cars have gradually become something of a black sheep. As black as the emissions they are accused of scattering around our cities, at a time when development cannot be other than sustainable and eco-friendly. And as if that were not enough, 2020 arrived. An equally black year that saw the market collapse. A year that highlighted the turbulence that buffets the automotive industry from all sides and which has now rocked it to its foundations.

A SECTOR RENDERED ECONOMICALLY VULNERABLE

THE GLOBAL MARKET HAS BEEN HUGELY AFFECTED BY COVID

In 2019, the automotive world had allowed itself to be a little more upbeat. It was a relatively successful year and the next few months looked promising. But on 17 November 2019, everything changed. In Wuhan, China, the SARS-Cov-2 coronavirus was discovered.
A few weeks later, the upbeat mood was gone.

While the economic impact of the pandemic has been all enveloping, profoundly affecting all economic sectors with very few exceptions, the automotive industry was one of the first to be severely impacted. As early as February, sales in China were wiped out almost entirely. The spread of the virus soon triggered a similar collapse across the world.

Two countries went on to emerge from this slump. China saw its market bounce back in April and gradually stabilise. Turkey also witnessed a spectacular increase in sales, due primarily to the Turkish lira's dramatic devaluation in 2019, which had led to a spectacular contraction of the market. If we look at the countries covered by this Observatoire, Japan comes out "on top", while Spain and the United Kingdom have seen the biggest declines.

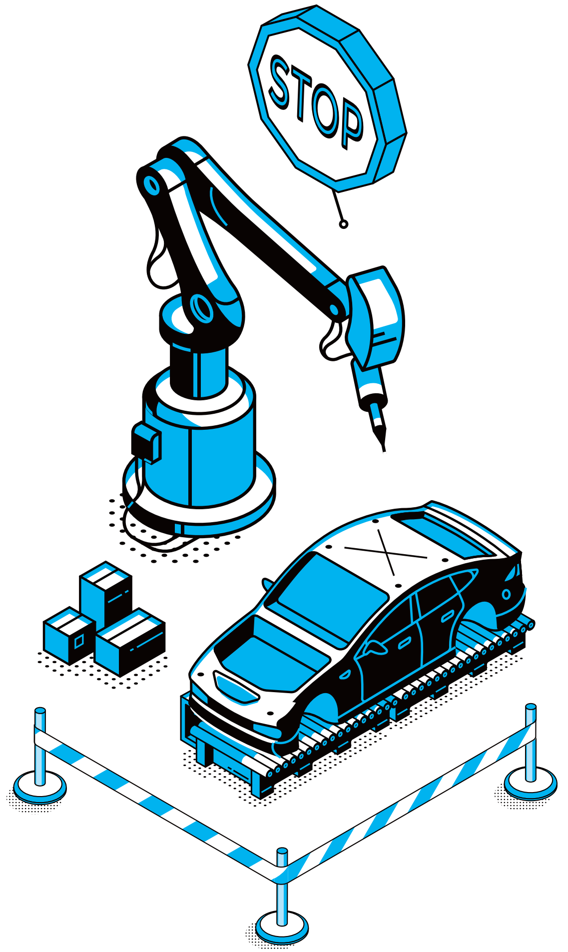
The pandemic is affecting not only sales, but also production. Assembly line stoppages, varying proportions of personnel off sick with the virus... the consequences for the industrial base have been severe, with sharp falls in output in some countries, Germany and Spain in particular. This has had a direct impact on employment.

Fig. 1 / Context

Comparison of car sales in 2019 and 2020

Sources: OICA (up until August 2020) / ACEA and national federations (September 2020). 2020 forecasts: C-Ways.
(*) Passenger and light commercial vehicle sales over the first 9 months of the year.

	9-month sales 2019 (*)	9-month sales 2020 (*)	Difference	Sales 2019	Forecasts 2020	Difference vs. forecast
South Africa	377,931	249,093	-34%	536,611	358,654	-33%
Germany	2,969,985	2,228,612	-25%	4,017,059	3,133,306	-22%
Belgium	494,590	375,265	-24%	644,041	498,202	-23%
Brazil	1,940,170	1,301,659	-33%	2,787,850	1,925,927	-31%
China	16,935,008	15,295,003	-10%	25,768,677	23,449,496	-9%
Spain	1,131,801	706,591	-38%	1,501,260	963,172	-36%
United States	12,823,701	10,318,830	-20%	17,480,004	14,333,603	-18%
France	1,997,567	1,449,675	-27%	2,755,696	2,000,000	-27%
Italy	1,602,483	1,071,183	-33%	2,131,916	1,425,084	-33%
Japan	3,991,776	3,271,879	-18%	5,195,216	4,363,981	-16%
Netherlands	391,778	295,415	-25%	538,742	416,199	-23%
Poland	457,521	335,343	-27%	656,265	489,944	-25%
Portugal	200,179	124,281	-38%	271,817	184,836	-32%
United Kingdom	2,148,887	1,451,736	-32%	2,676,918	1,872,730	-30%
Turkey	281,309	493,621	75%	491,909	688,673	40%
Europe	11,394,791	8,038,101	-29%	15,193,714	10,983,472	-28%
15-country	47,744,686	38,968,186	-18%	67,453,981	56,103,807	-17%



CHINA: THE SHIP IS DAMAGED BUT STILL AFLOAT

As the first country affected by COVID-19, China was also the first to see its automotive market suffer the consequences. Sales fell 20% in January and plummeted by 81% in February. They then stabilised and started to bounce back in April. China was also the first country to bring the pandemic under control, with monthly sales growth subsequently fluctuating between -3% and +9% compared with 2019 (source: CAAM).

THE CRISIS THREATENS A HUGE NUMBER OF JOBS

In April 2020, at least 1.1 million people worked in the automotive sector in Europe. This figure is non-exhaustive and only includes individuals directly employed by car, truck, van and bus manufacturers. The impact on the wider automotive supply chain has been even more acute.

1.1 MILLION JOBS AFFECTED IN EUROPE

Fig. 2 / Context

Automotive jobs affected by the COVID-19 crisis in each European country

(April 2020 statistics)

Source: ACEA.

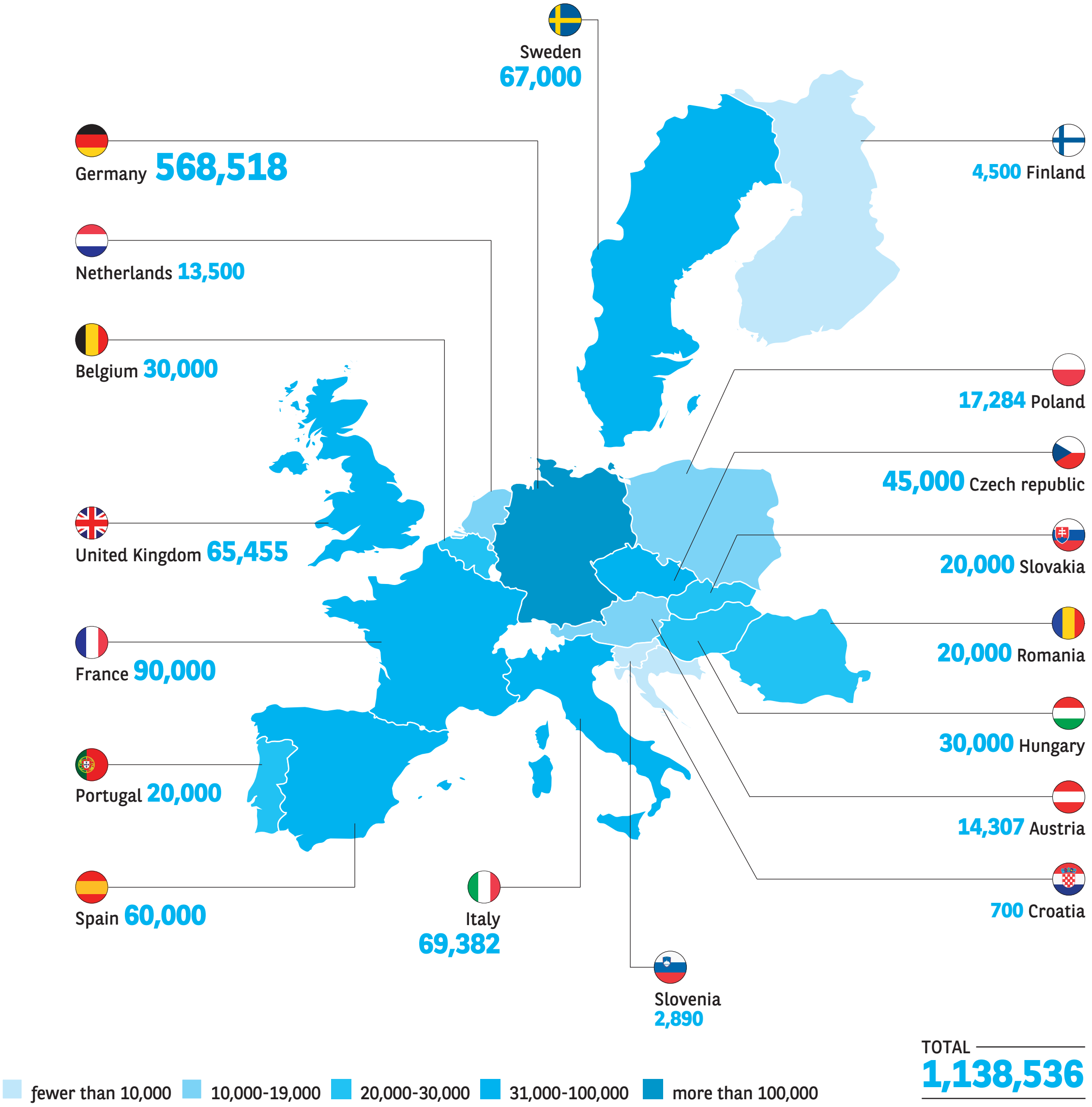


Fig. 3

Do you plan to buy a car in the next 12 months?
Select one answer only. Proportion of "Yes" answers.
Source: L'Observatoire Cetelem de l'Automobile.

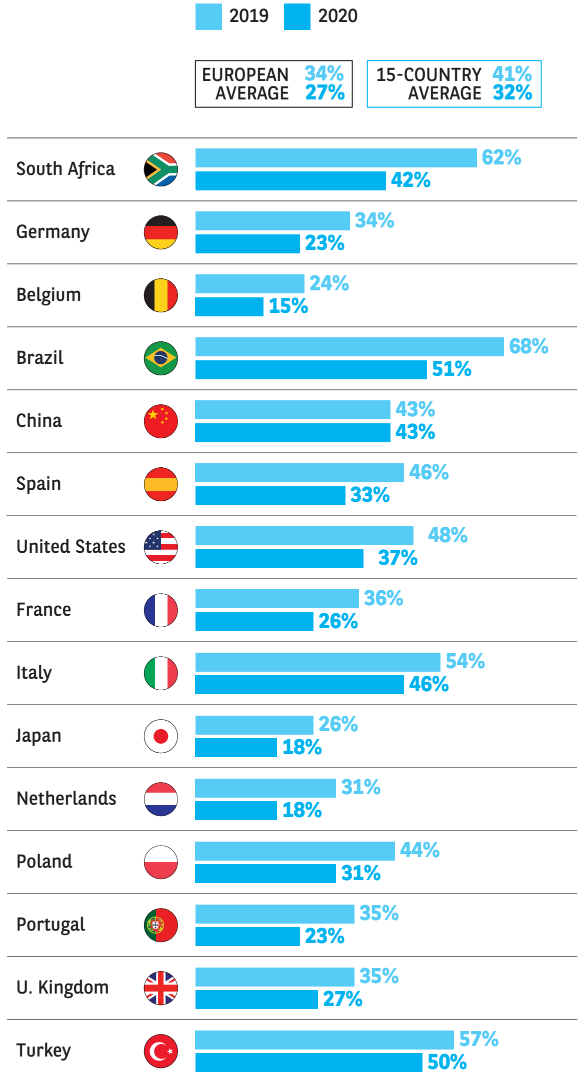
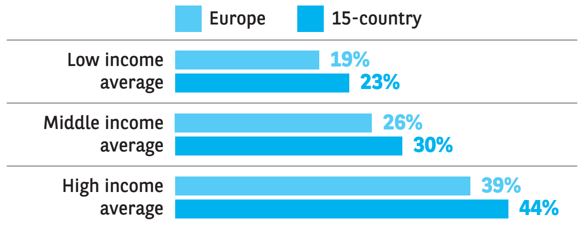


Fig. 4

Do you plan to buy a car in the next 12 months?
Select one answer only. Proportion of "Yes" answers.
Source: L'Observatoire Cetelem de l'Automobile.



PURCHASING INTENTIONS HAVE SUFFERED

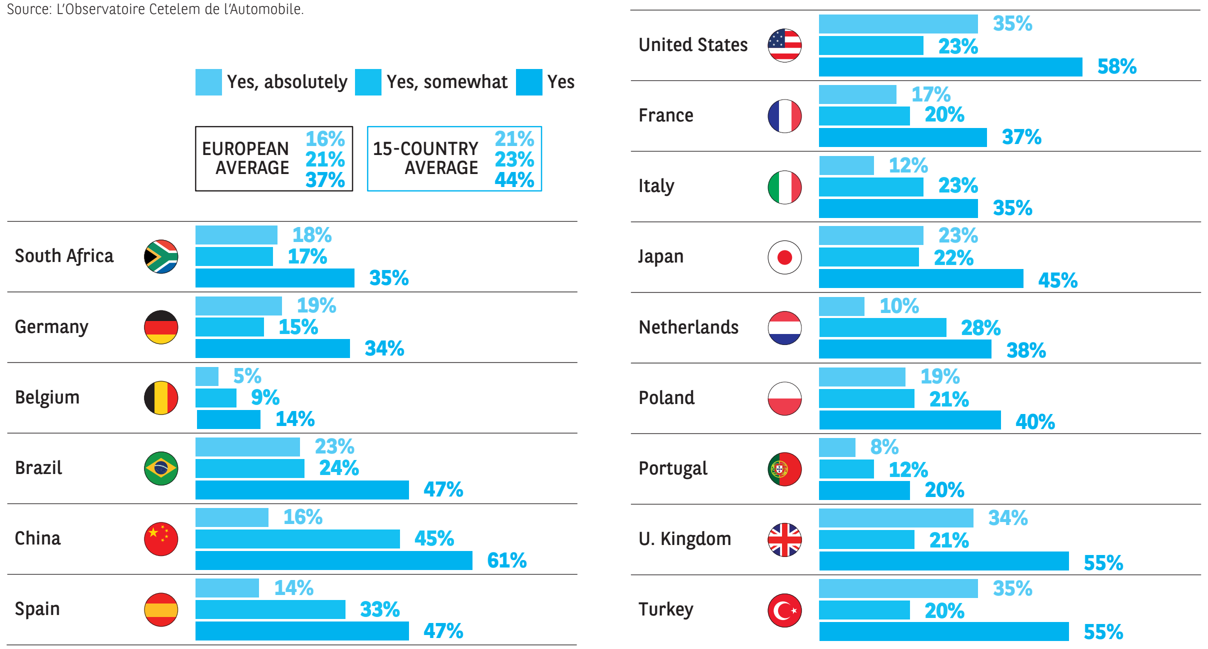
Production output and sales both fell in 2020, while purchasing intentions for the next 12 months do not inspire great optimism. It should be stressed from the outset that the survey was carried out in September, before the second wave of the pandemic, which has affected all participating countries.
But even at this juncture it pointed to purchasing intentions that had contracted significantly compared with 2019. Whereas 41% of those surveyed a year ago were planning to buy a vehicle in the next 12 months, only 32% (27% of Europeans) now intend to do so **(Fig. 3)**. The emerging economies, as well as China, Italy and the United States, offset this negative trend somewhat with their greater keenness to make a purchase. Nonetheless, with the exception of China, which, as we have highlighted, was the first to experience something of a recovery, purchasing intentions are down significantly across the board.
A breakdown based on income points to the fact that wealthier households are more likely than average to want to buy a new vehicle **(Fig. 4)**.

THE RELATIVE IMPACT OF THE HEALTH CRISIS

The pandemic has had a real yet moderate impact on these purchasing intentions. This is borne out by the responses of just over a third of those surveyed. However, there are significant disparities between, on the one hand, China, the United States, Turkey and the United Kingdom, where more than 1 in 2 respondents state that they have been influenced by COVID-19, and, on the other, Portugal and Belgium, where the figure is 1 in 5, at the very most **(Fig. 5)**.

Fig. 5

Has your intention to buy a car been prompted by the COVID-19 crisis?
Select one answer only. Proportion of "Yes" answers. Answers of respondents who are planning to buy a car in the next 12 months.
Source: L'Observatoire Cetelem de l'Automobile.



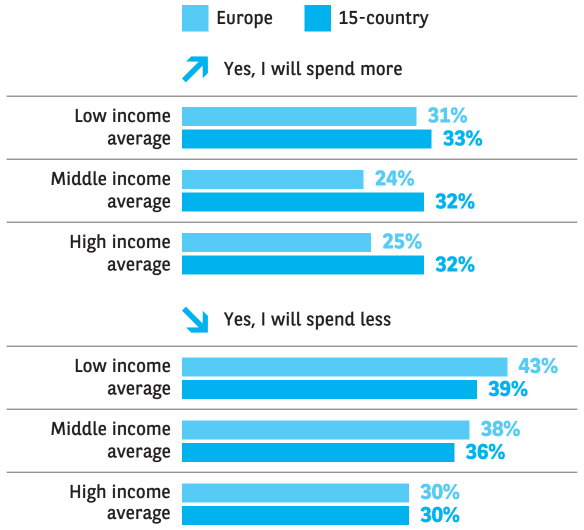
SPENDING BUDGETS HAVE BEEN DOWNSIZED

Similarly, the impact of the virus on the budget consumers plan to set aside for a future vehicle purchase highlights two contrasting groups of countries, but overall there are as many motorists who want to spend more as there are who want to spend less (35% in both cases) **(Fig. 6)**. Those most willing to part with their money are the emerging nations, but also the United States, the UK and Japan. Meanwhile, a significant proportion of Turks intend to increase their budget (62%), in line with the mass spending that took place in 2019. Conversely, vehicle acquisition budgets have fallen most significantly in the Latin countries, with nearly 1 in 2 Italians planning to cut the amount they spend.

In almost every country, those on the lowest incomes state their intention to spend less **(Fig. 7)**. It is worth noting that in three countries, virtually equal numbers of respondents intend to increase and reduce their budget: Germany, South Africa and Brazil.

Fig. 7

Do you think that the health crisis and its economic consequences will have an impact on how much you spend on your next car?
Select one answer only. Proportion who answered "Yes, it will have an impact". Answers of respondents who are planning to buy a car in the next 12 months.
Source: L'Observatoire Cetelem de l'Automobile.

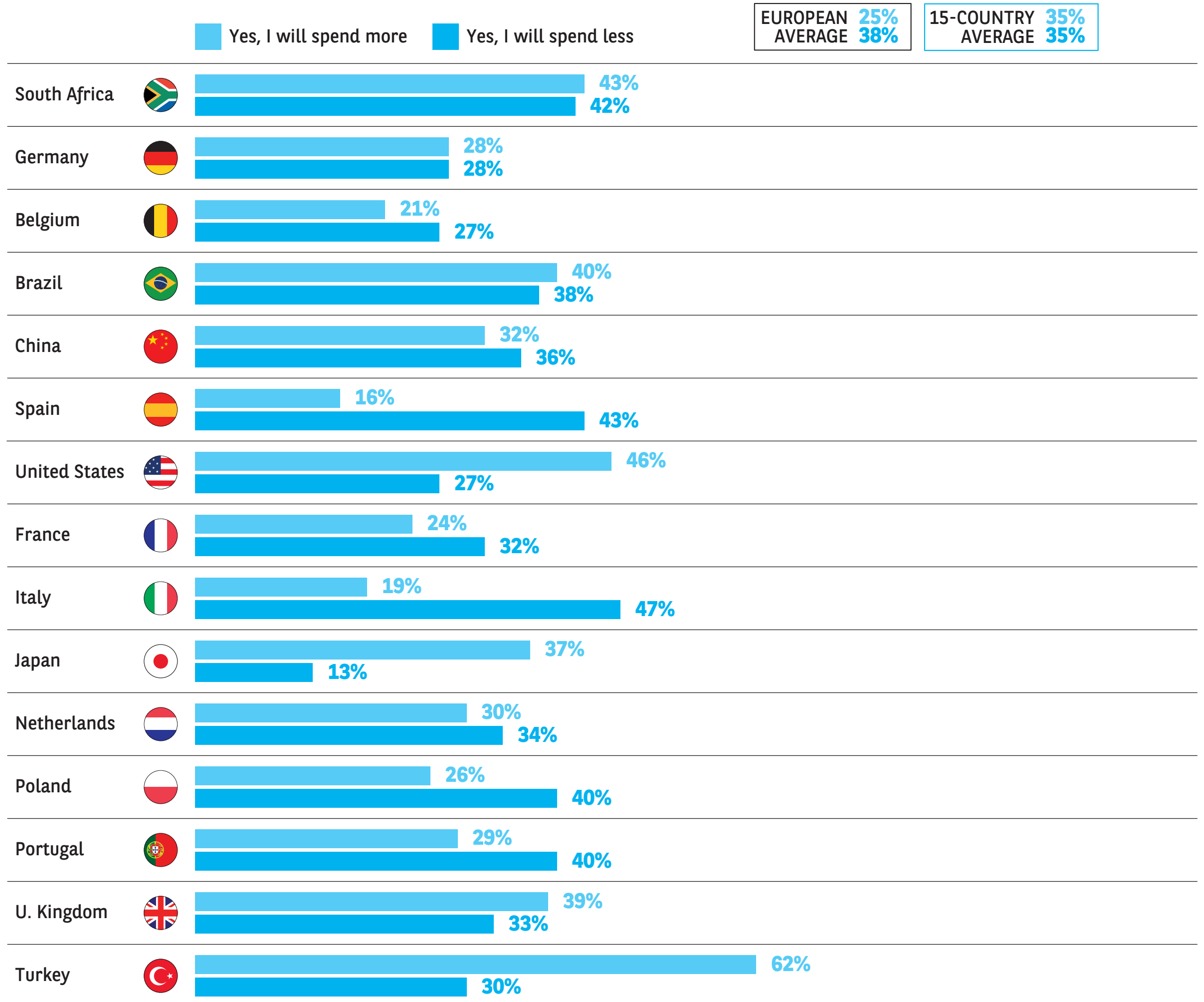


2 IN 3

PEOPLE EXPECT THE CRISIS
TO AFFECT THEIR VEHICLE BUDGET

Fig. 6

Do you think that the health crisis and its economic consequences will have an impact on how much you spend on your next car?
Select one answer only. Proportion who answered "Yes, it will have an impact".
Answers of respondents who are planning to buy a car in the next 12 months.
Source: L'Observatoire Cetelem de l'Automobile.



GOVERNMENT SUPPORT IS DEEMED INSUFFICIENT

In this unsteady economic climate, which has seen sales drop off, jobs cut and purchasing intentions fall, the finger is being pointed firmly in the direction of an actor that is deemed not to have done enough: the government.

GOVERNMENTS ARE NOT PLAYING THEIR PART TO THE FULL

6 out of 10 people believe that governments are not playing their part in supporting the automotive sector. And this opinion is almost unanimous, given that less than half of those surveyed agree with this statement in only three countries: Japan (34%), the United States (45%) and Germany (49%) **(Fig. 8)**. Interestingly, these are the three countries that are home to the world's largest automakers.

In the emerging countries and the Iberian Peninsula, criticism regarding the lack of state intervention to support the automotive sector is particularly fierce, as exemplified most starkly by the 8 out of 10 Brazilians and Spaniards who express this view.

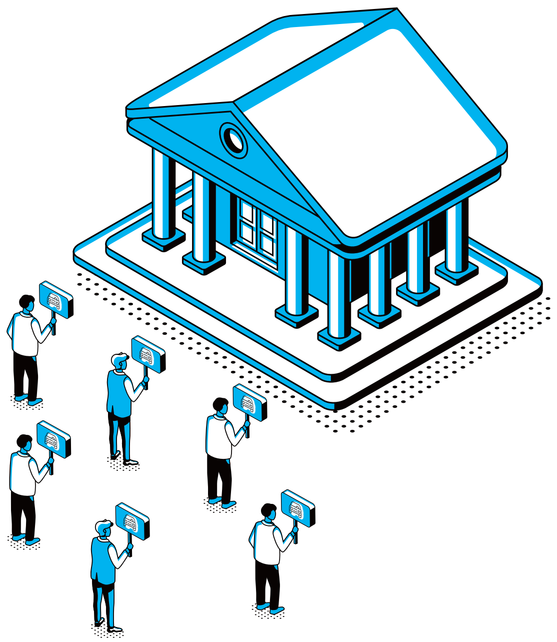
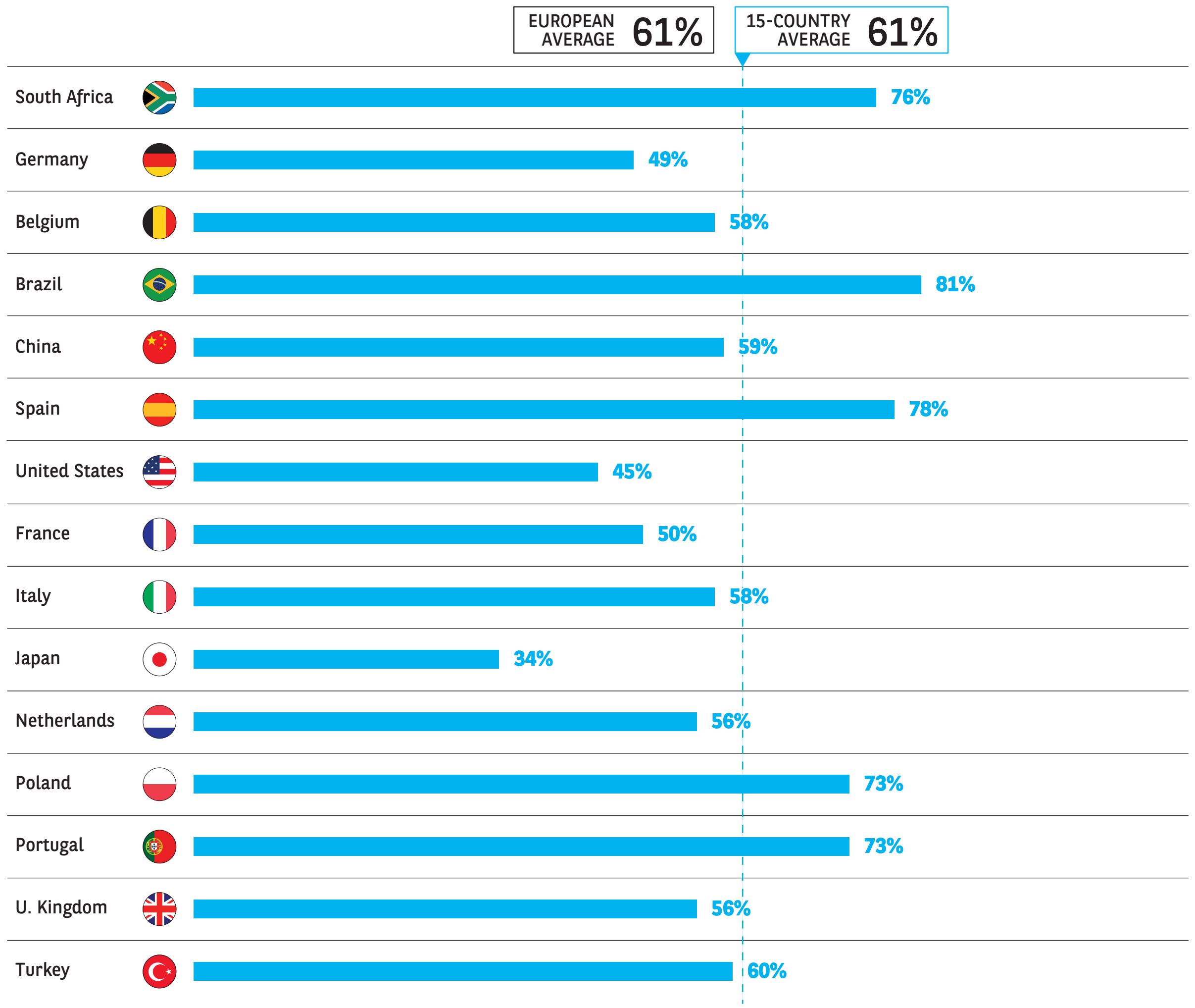


Fig. 8

Do you believe that government efforts to support the automotive industry and trade are…
Select one answer only. Proportion who answered "Insufficient".
Source: L'Observatoire Cetelem de l'Automobile.



VARYING AWARENESS OF SUPPORT PLANS

However, this criticism of governments is largely a matter of opinion that mainly reflects concern about the future of the sector and those it employs, rather than being based on hard evidence. Because when individuals are asked whether their government has launched a plan to support the industry, there is considerable uncertainty. On average, almost 50% of those surveyed do not know if this is the case **(Fig. 10)**. Reassuringly, in France, China and Italy, where such plans have been implemented, the authorities seem to have done a good job of publicising the fact, with 1 in 2 people being aware of these measures. However, that is not the case in Germany and Spain, two countries in which the government has also actively supported the sector.

Fig. 9 / Context

Spotlight on a few of the support plans implemented

Sources: (1) Economie.gouv.fr, (2) Wallbox.com, (3) Autobild, (4) RFI, (5) Reuters.

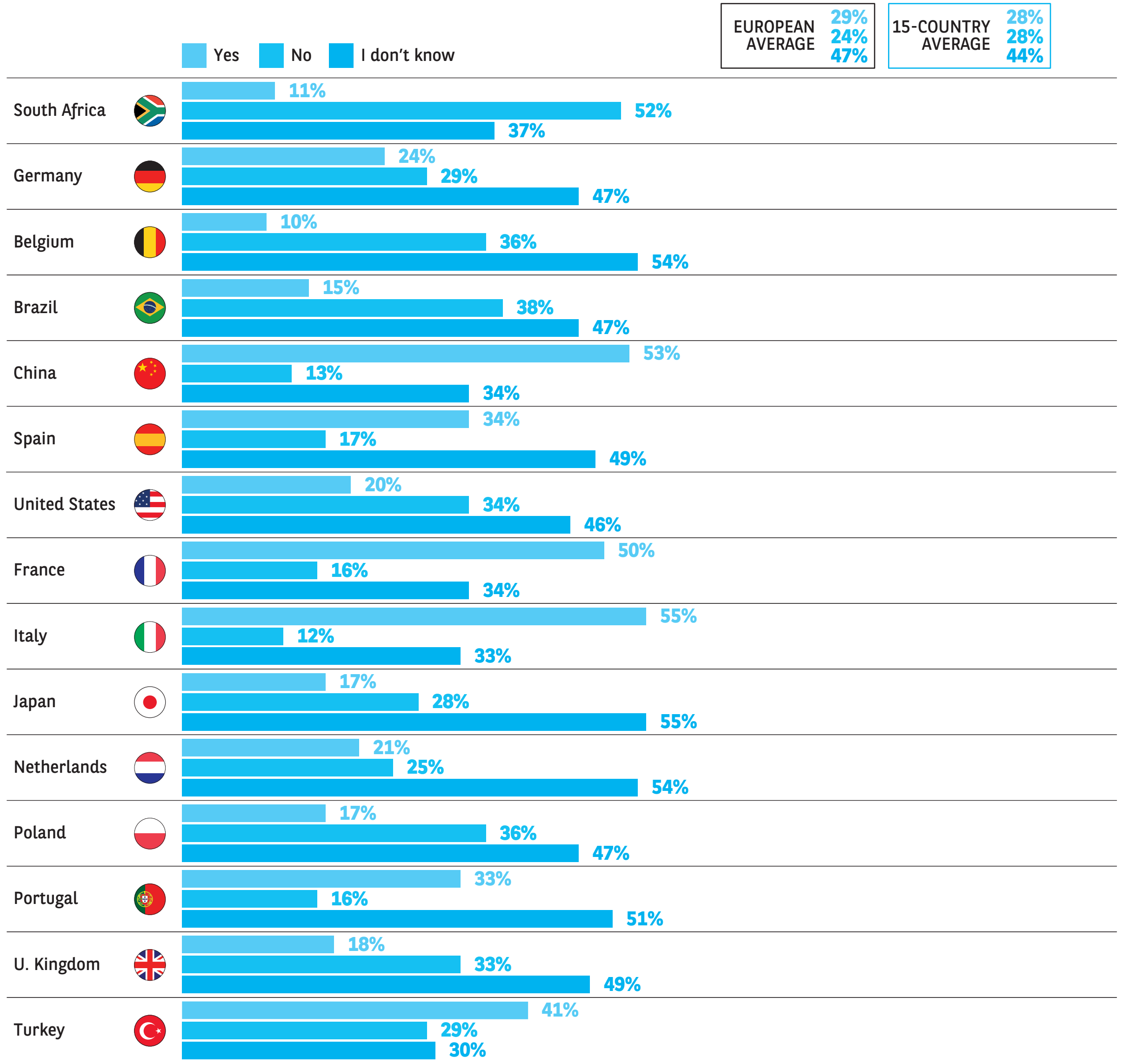
France[1]	**€1 billion invested** to support the modernisation of production lines and the ecological transformation of the automotive industry.
Germany[2]	**An increase in the bonuses granted to those who purchase electric vehicles** (+50%, up to 9,000 euros).
Spain[3]	**An increase in the bonuses** granted to those who purchase electric vehicles (up to 5,500 euros). Backing provided to the industry through **loans to support R&D and investment** in plant modernisations.
Italy[4]	**€6.3 billion loan provided to Fiat-Chrysler** to support the sector, subject to its operations being located in Italy, with penalties applied for non-compliance with this requirement.
China[5]	**Subsidies for electric vehicles extended for two years** to support the market.

Fig. 10

To your knowledge, has your government launched a plan to support the automotive industry?

Select one answer only.

Source: L'Observatoire Cetelem de l'Automobile.



SUSTAINED ENVIRONMENTAL PRESSURE

WHEN IT COMES TO THE ENVIRONMENT, LEGITIMATE CONCERNS ARE RAISED ABOUT THE AUTO INDUSTRY...

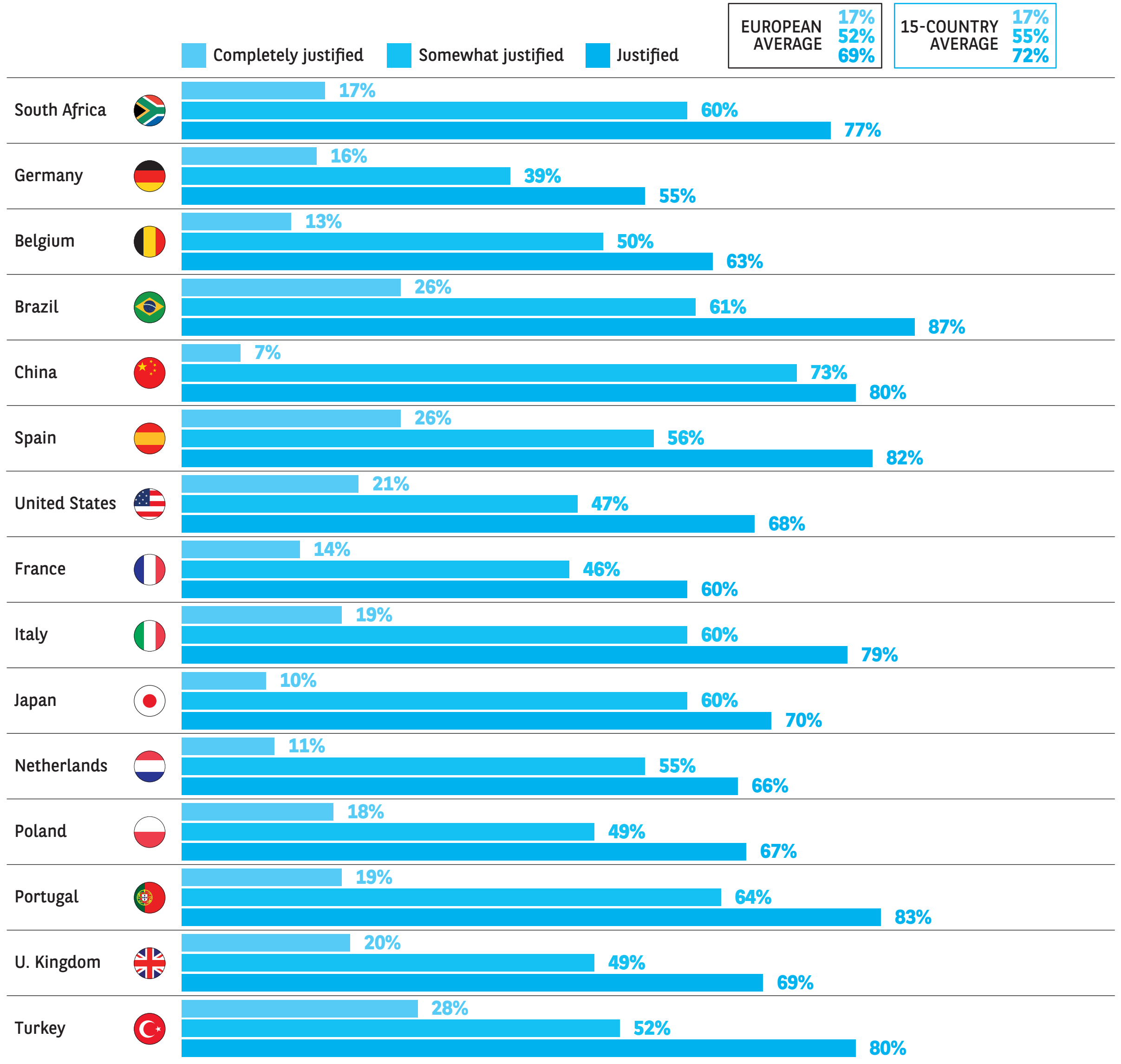
The view seems to be that the automotive sector is not receiving the economic support it deserves. But would it be sensible to do so, given that those surveyed believe that the industry does not take sufficient environmental responsibility? Indeed, there is a clear consensus on this matter. 72% (69% in Europe) feel that criticism of the auto industry for environmental failings is justified **(Fig. 11)**. The figure exceeds 50% in every country. The emerging nations and those on the Iberian Peninsula are the most vehement, with 87% of Brazilians and 83% of Portuguese deriding the sector for its lack of respect for the environment.

Fig. 11

Would you say that the criticisms levelled at cars are justified?

Select one answer only. Proportion who answered "Are justified".

Source: L'Observatoire Cetelem de l'Automobile.



Even in the United States, whose politics in recent years has cultivated a degree of climate scepticism, 68% condemn the environmental harm caused by vehicles.

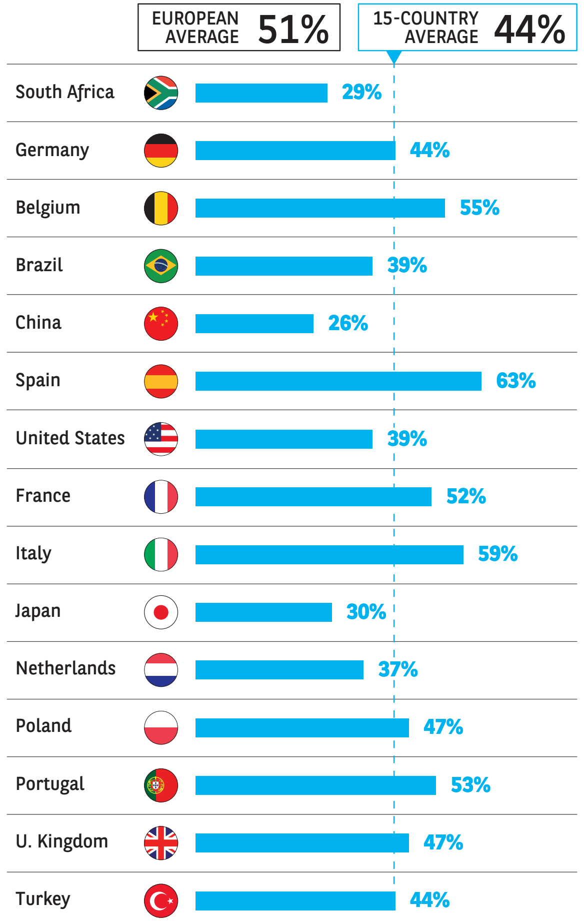
One has to look to Belgium, France and Germany (63%, 60% and 55%) to find the least critical respondents. These are three countries in which the most recent elections were considered a great success for Green parties. A paradox? No, this simply reflects a greater maturity of judgement. Criticism in this area is now a firmly established part of public opinion that is quickly becoming the norm. In addition, contradictory arguments have brought out opposing viewpoints that temper such condemnation.

... BUT MORE THAN OTHER SECTORS

However, 1 in 2 people in Europe (44% worldwide) **(Fig. 12)** believe that motor vehicles receive more criticism in this respect than sectors such as construction, agriculture and other forms of transport. Inhabitants of European Union countries, who are probably more mature and better informed when it comes to environmental issues, are more likely to be of this opinion (63% in Spain, 59% in Italy). At the opposite end of the spectrum, the Chinese are quicker to blame urban pollution on cars than on industry, with only a small proportion sharing the view that the auto industry is unfairly criticised (26%).

Fig. 12

Do you believe that the automotive industry receives more or less criticism for its environmental impact than other sectors (agriculture, construction, energy, textiles, etc.)?
Select one answer only. Proportion who answered "more criticism".
Source: L'Observatoire Cetelem de l'Automobile.



POLLUTING VEHICLES SHOULD BE HEAVILY TAXED

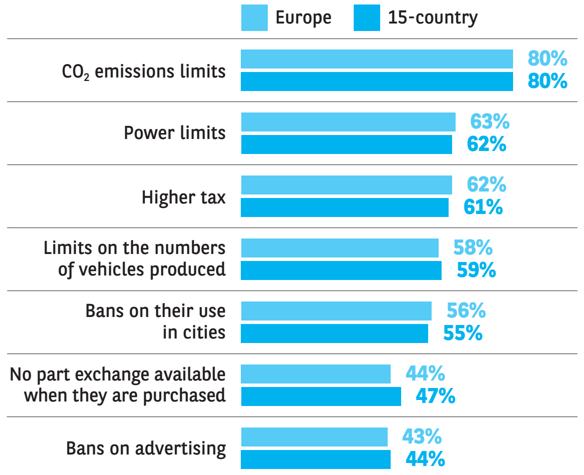
Viewed against the backdrop of a major health crisis, penalising drivers of the least eco-friendly vehicles seems to be an uncontroversial idea. Of all the measures put forward, setting a CO_2 emissions limit is the most popular (80%) **(Fig. 13)**. The Chinese, whose country is the most severely affected by pollution, are the most likely to favour such a regulation (88%), followed closely by the Turks (87%), whose capital city is a vast and continuous traffic jam. Meanwhile, American citizens are the least enthusiastic about the idea (67%).

Two additional measures are also viewed favourably. One relates to vehicle power output, the other to the wallets of potential buyers. 62% globally (63% in Europe) would like to see vehicle power limited. Once again, the Chinese and Turks are very much in favour of this measure (76% and 69%), as are the French (69%). The three populations that are the least convinced of its validity are the South Africans, the Americans and the Dutch (54%, 53% and 52%). As regards the imposition of financial penalties, the Chinese and Turks are again the most enthusiastic (79% and 68%).

Two final measures are popular among more than half of those surveyed. Restricting production of the least environmentally-friendly vehicles (59%). Prohibiting these same vehicles from entering cities (55%). Once again, the Chinese and Turks head the field of those who support these solutions. It should be noted that France ranks third on every measure put forward.

Fig. 13

Do you believe that the least environmentally friendly vehicles (4x4s, SUVs, large saloons, sports cars, etc.) should be subject to the following restrictions?
Select one answer per statement.
Proportion of "Yes" answers.
Source: L'Observatoire Cetelem de l'Automobile.



AN IMAGE TINGED WITH CAUTION

In L'Observatoire Cetelem 2017, entitled *"I love my car"*, 9 out of 10 respondents stated that they had a positive or very positive image of cars. Four years later, putting aside this declaration of intention, the image people have of cars and, by extension, their role in our world, appears to be in question.

THE SENSIBLE EQUAL THE ENTHUSIASTIC IN NUMBER: CARS ARE NOT THE STUFF OF DREAMS THEY ONCE WERE

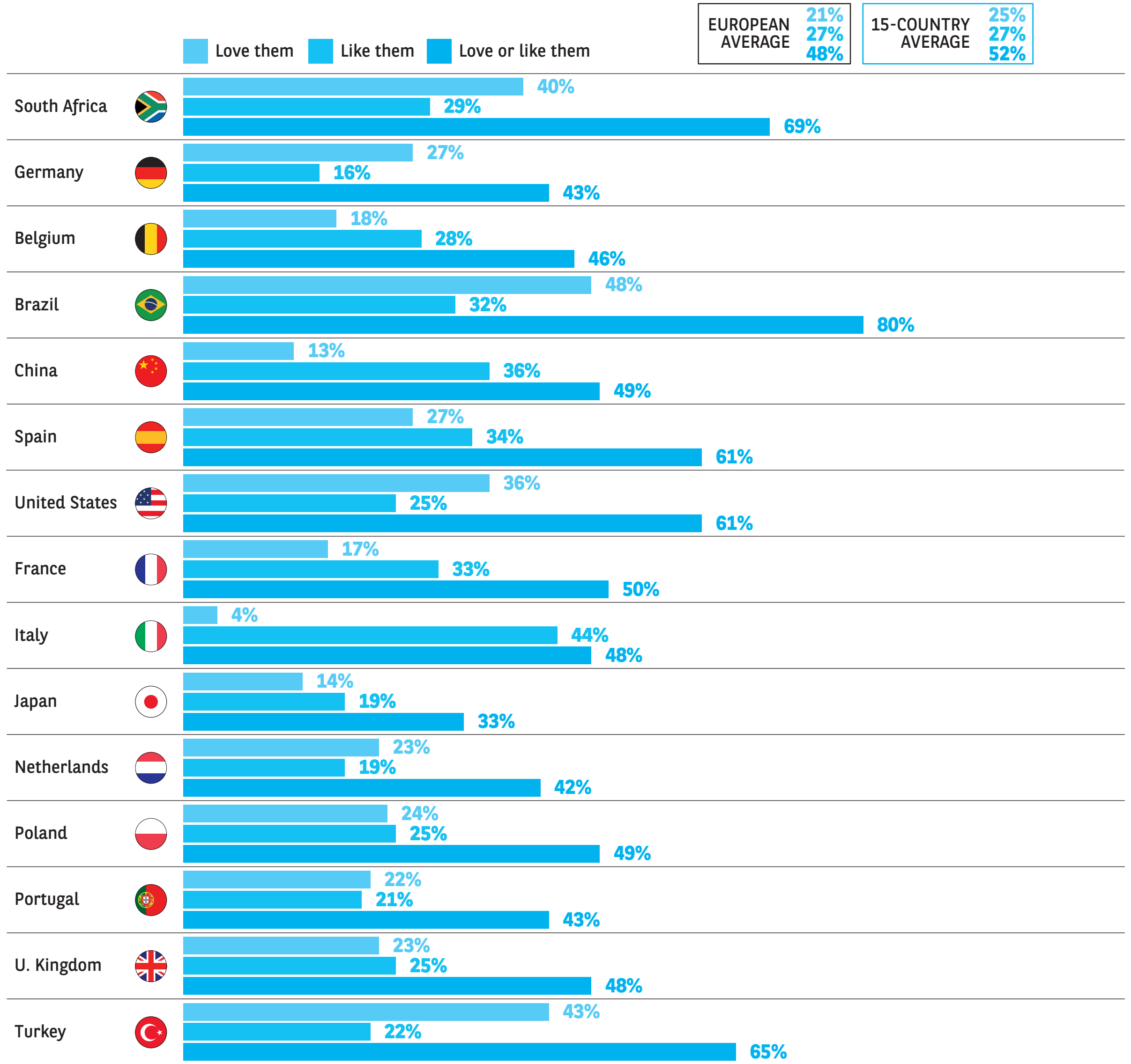
Although 1 in 2 people say they are interested in cars, this interest is more likely to be driven by reason than passion. Only a quarter of those surveyed say that they really love cars and motoring **(Fig. 14)**. These enthusiasts are most likely to be found in Turkey, South Africa and Brazil (43%, 40% and 48%), countries conquered by motor vehicles relatively recently, but also in the United States, where the car is king (36%). Conversely, in China and Italy passions do not run as high. With only 4% declaring that they love cars, the Italians dispel the stereotype that they are passionate about beautiful mechanical creations. We should also underline that, overall, such passion has a price or, rather, is contingent on a high income. The most affluent households are almost twice as likely to describe themselves as car lovers than those with the lowest incomes (32% vs. 19%).

Fig. 14

When it comes to cars, would you say that you…

Select one answer only. Proportion of people who are interested in cars.

Source: L'Observatoire Cetelem de l'Automobile.



AN ENDURING ATTACHMENT

While cars may fuel fewer dreams today, our attachment to them is still relatively strong. This attachment has remained constant over time. In L'Observatoire Cetelem 2017 ("*I love my car*"), the average attachment score respondents assigned to cars was 6.7. Four years later, it is practically identical: 6.6 worldwide and 6.7 in Europe, with those in Latin countries being the fondest of their vehicles **(Fig. 15)**. However, cars are no longer people's "favourite", as they were in the past. They are invariably surpassed by mobile phones, an inescapable, indispensable and unparalleled product in the modern world (8.1 worldwide, 8.2 in Europe). The income factor reveals a very clear disparity between the wealthy, who are very attached to their cars (7.4), and lower income individuals, whose attachment is weaker (5.9). The monetary and use value of a vehicle go some way to explaining this difference.

Fig. 15

How attached are you to the following items?

Select one answer per statement. Score between 1 (not at all attached) and 10 (very attached).

Source: L'Observatoire Cetelem de l'Automobile.

	Your mobile phone	Your car 2020	Your car 2017	Your home	Your laptop computer
South Africa	8.5	6.9	7.1	8.4	7.0
Germany	6.3	6.1	7.1	8.0	5.8
Belgium	7.3	6.7	6.7	8.4	6.8
Brazil	8.2	6.9	7.8	8.5	6.9
China	8.1	6.1	7.3	8.3	5.9
Spain	7.4	7.3	7.0	8.6	7.0
United States	7.7	6.8	6.2	7.5	6.1
France	7.0	6.6	6.7	7.9	6.6
Italy	7.5	7.3	6.6	8.4	7.1
Japan	6.2	5.8	6.6	7.1	5.1
Netherlands	7.2	6.5	-	8.2	6.5
Poland	8.0	6.9	6.9	8.6	7.3
Portugal	7.4	7.1	6.8	8.5	7.1
U. Kingdom	6.7	6.0	6.3	7.6	6.0
Turkey	7.8	6.6	7.0	8.1	6.7
Europe	7.2	6.7	-	8.2	6.7
15-country	7.4	6.6	-	8.1	6.5

A STATUS THAT IS VIEWED AS OVERBLOWN IN TODAY'S WORLD...

Are cars seeing their lustre fade? What is certain is that their relative status in an economic world that is shifting from the industrial to the digital is now seen as too high. More than 1 in 2 people are of this view, but the disparities are considerable. In the emerging countries, where the automotive market has gained importance more recently, but also in Portugal and Japan, its status is viewed as overblown, with 8 out of 10 Turks also being of this opinion **(Fig. 16)**. Meanwhile, in those countries whose relationship with the automobile is longer standing, this view is less prevalent (39%, 42% and 46% in the United Kingdom, Germany and France). In the Netherlands, a figure of 42% highlights a reluctance to heap scorn on cars, even though they often play second fiddle to bicycles in the country.

... BUT WHICH LOOKS TO BE FADING OVERALL

While there is a belief that too much importance is placed on cars, they are slowly fading from the landscape in the eyes of those surveyed. In particular, one-third believe that their presence in cities is falling and that more space is being freed up through a reduction in the number of lanes, parking spaces and car parks **(Fig. 17)**.
On this issue, those countries in which Green parties have the most influence, both nationally and locally, are the most forthright. 6 out of 10 French citizens and 1 in 2 Germans and Belgians bear witness to a gradual exodus of vehicles from cities. Conversely, just 1 in 10 Chinese share this feeling. The congestion caused by vehicles in the megacities of the Middle Kingdom does not seem set to ease any time soon.

1 IN 2

PEOPLE BELIEVE THAT CARS ARE GIVEN
TOO MUCH IMPORTANCE IN TODAY'S WORLD

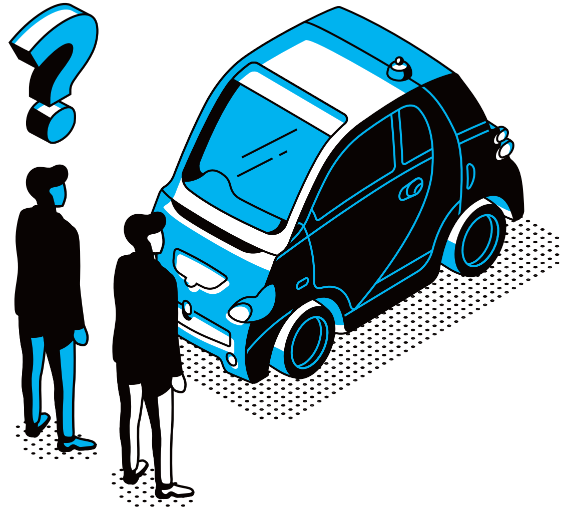


Fig. 16

Do you believe that too much or not enough importance is placed on cars in today's world?
Select one answer only. Proportion who answered "too much importance".
Source: L'Observatoire Cetelem de l'Automobile.

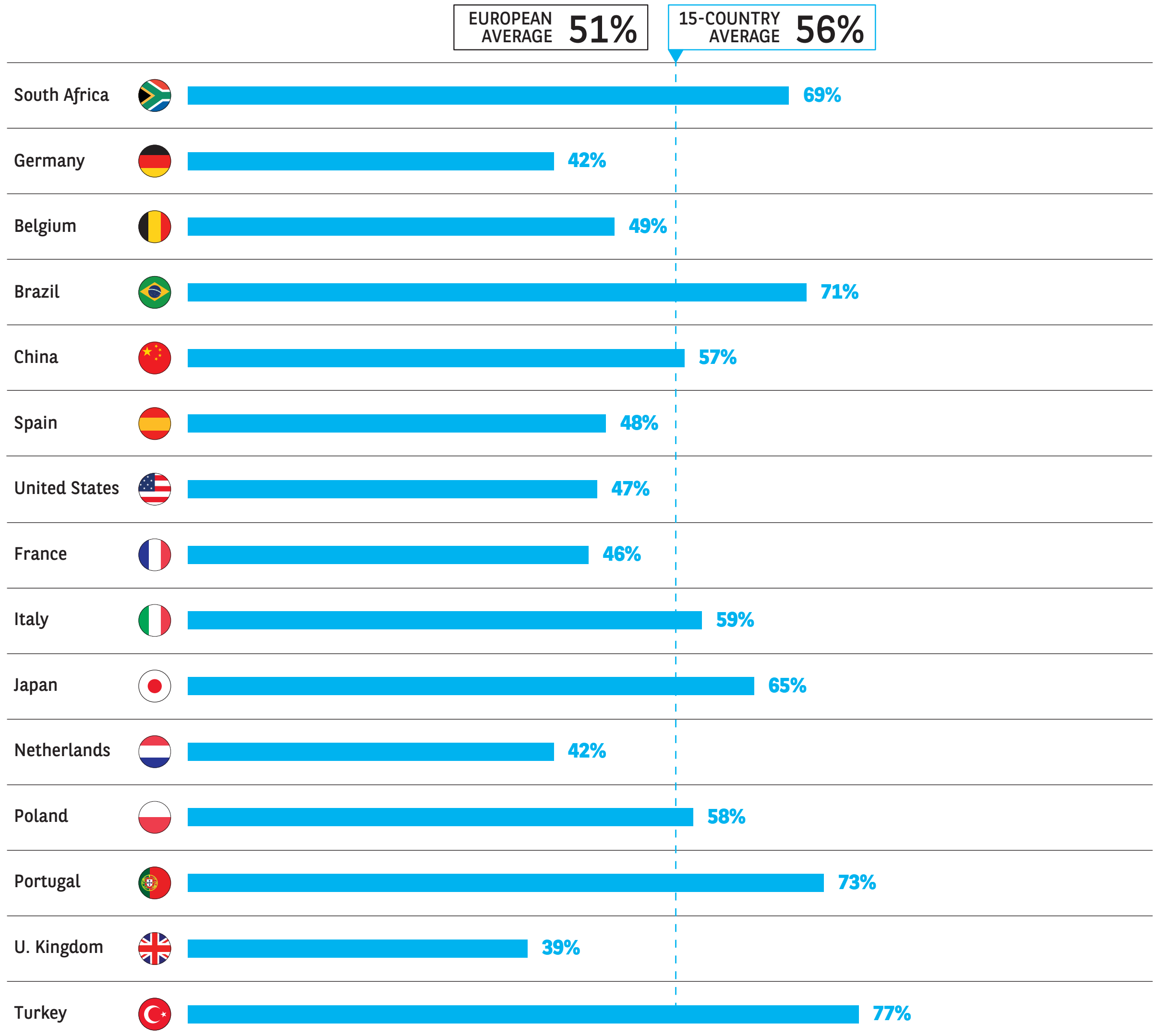
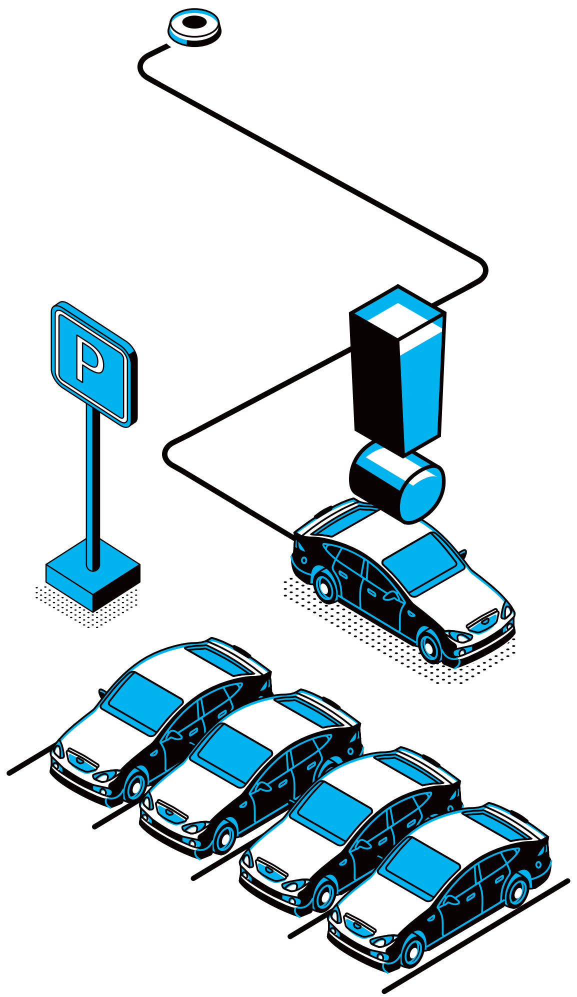


Fig. 17

Do you believe that the space given to cars in cities (lanes, parking spaces, car parks, etc.) is...
Select one answer only.
Proportion who answered "Being reduced".
Source: L'Observatoire Cetelem de l'Automobile.

EUROPEAN AVERAGE 35%
15-COUNTRY AVERAGE 32%

Country	Being reduced
South Africa	12%
Germany	49%
Belgium	48%
Brazil	45%
China	8%
Spain	32%
United States	27%
France	58%
Italy	23%
Japan	41%
Netherlands	35%
Poland	15%
Portugal	28%
U. Kingdom	33%
Turkey	22%



GERMANY, BELGIUM AND FRANCE: THE GROWING POWER OF GREEN PARTIES

The most recent European elections, much like France's local elections, confirmed the rising popularity of Green parties and probably their long-term presence in the political landscape. This is particularly true in three countries of L'Observatoire Cetelem, which exhibit similar views on environmental issues. Thus, Belgian ecologists saw their representation increase by 50% in the last election, while in France the number of representatives doubled. In the latter, a number of major cities (including Lyon, Bordeaux and Grenoble) are now run by the Greens. In Germany, they have held positions of responsibility for several years now.

Fig. 18 / Context

Number of Green seats in the European Parliament after the 2014 and 2019 elections
Source: European Parliament.

	Number of Green seats 2014 / 2019 / Total number of seats	% of Green seats	Percentage change 2014-2019
Germany	13/96 25/96	14% 26%	92% ↗
Belgium	2/21 3/21	10% 14%	50% ↗
Spain	4/54 2/54	7% 4%	-50% ↘
France	6/74 12/74	8% 16%	100% ↗
Italy	0/73 0/73	0% 0%	0% →
Netherlands	2/21 3/21	10% 14%	50% ↗
Poland	0/51 0/51	0% 0%	0% →
Portugal	0/21 1/21	0% 5%	SO -
Total in the countries surveyed	27/411 46/411	7% 11%	70% ↗
Total in the 28 EU countries	50/751 74/751	7% 10%	48% ↗

A DESIRE FOR CARS TO HAVE THEIR STATUS LOWERED FURTHER

Today, the view that cars have too much of a presence comes with the assumption that this presence will fall in the future. 64% of those surveyed (68% in Europe) believe it is desirable or highly desirable for the presence of cars in cities to be reduced, although this does not point to complete intransigeance on the matter **(Fig. 19)**.

Those who state that it is “highly desirable” account for just 19% of the total and tend to be at the higher end of the income spectrum.

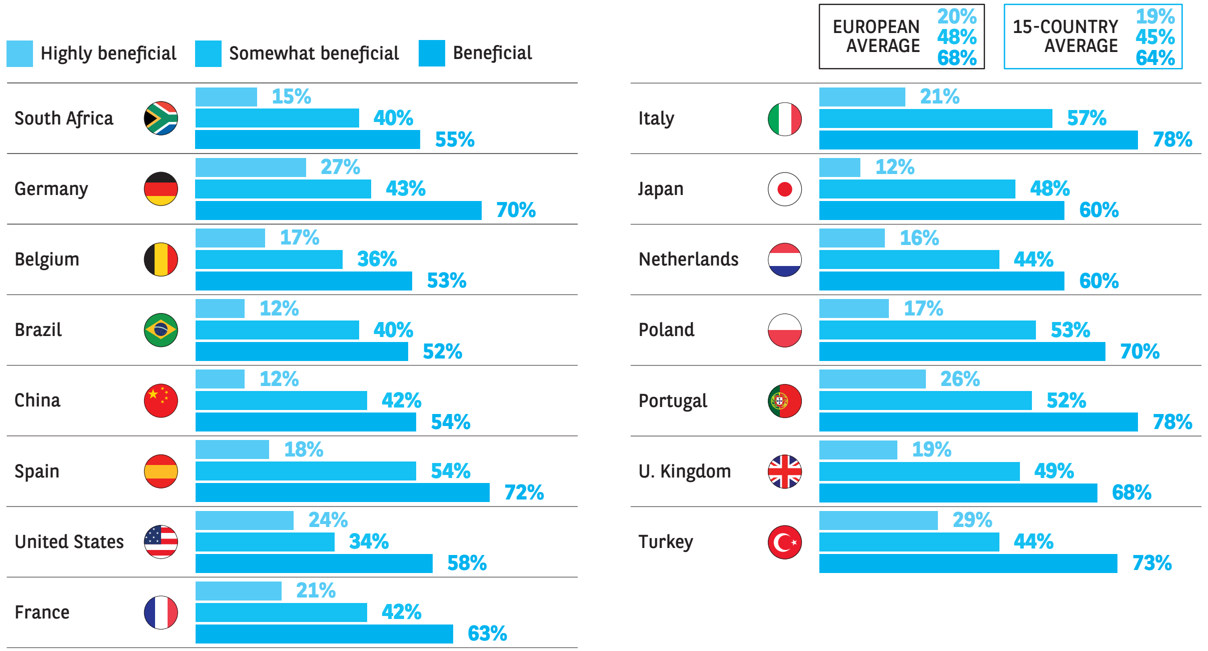
This desirability varies from country to country. While the Italians, Portuguese, Spanish and Turks are the most likely to hold this view, the Brazilians, South Africans, Belgians and Americans are more measured.

Fig. 19

Do you believe it would be beneficial to reduce the space given to cars in cities (lanes, parking spaces, car parks, etc.)?

Select one answer only. Proportion who answered “Beneficial”.

Source: L’Observatoire Cetelem de l’Automobile.



KEY FIGURES

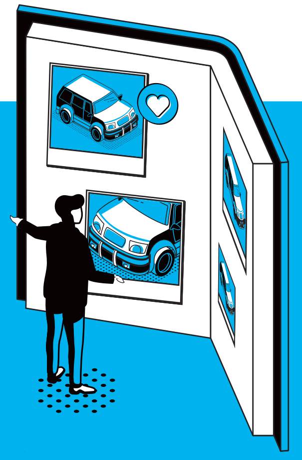
1 in 2 Europeans
believe that the automotive industry is more heavily criticized for its environmental impact than other sectors.

1 in 2 people
say they are interested in cars.

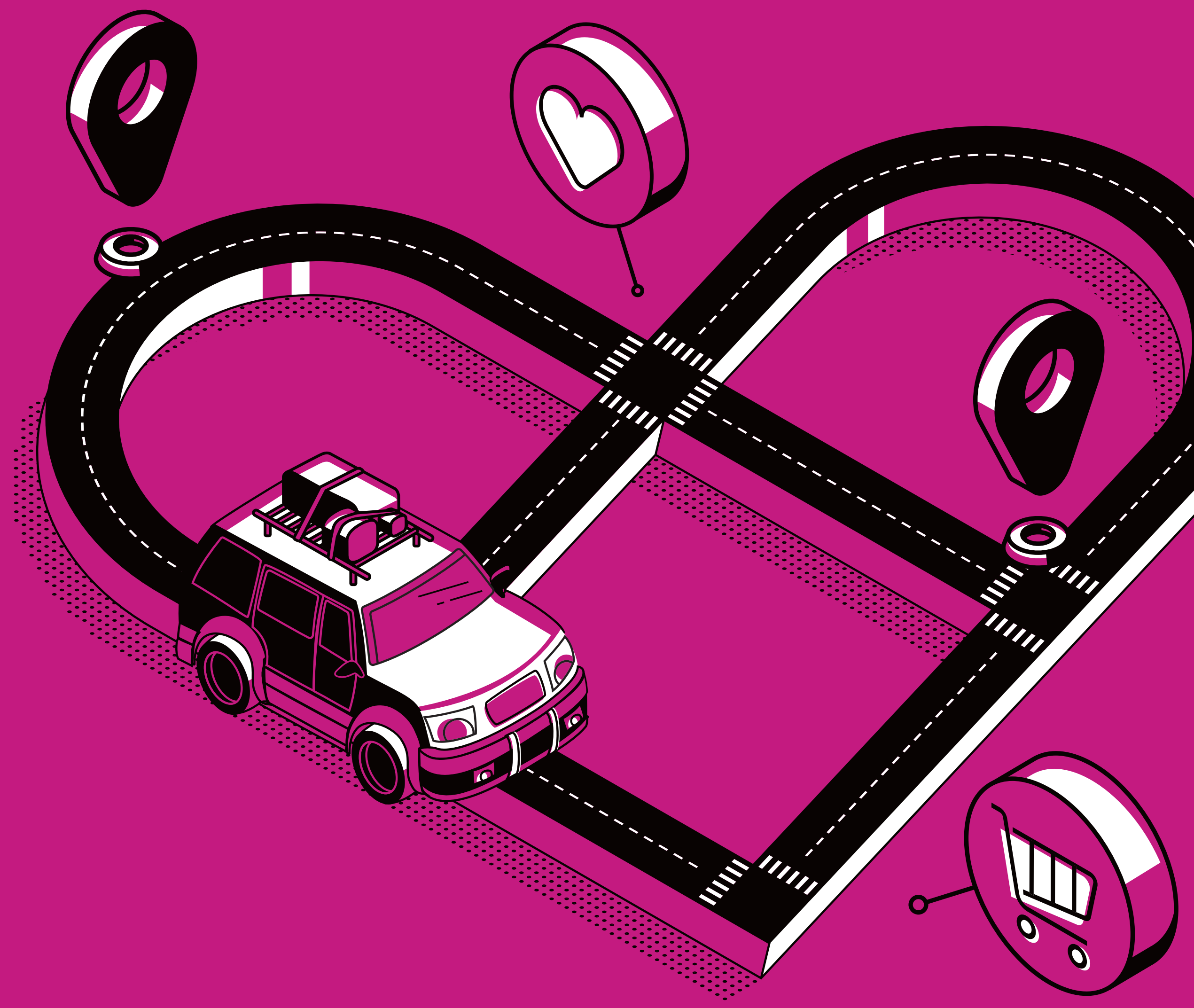
1 in 4 people
say they love cars.

44%
of people state that the health crisis has had an impact on their purchasing intentions.

32%
of people are thinking of buying a vehicle in the next 12 months (down 9% from 2019).



6.6/10
the average score across all the countries when it comes to attachment.



2

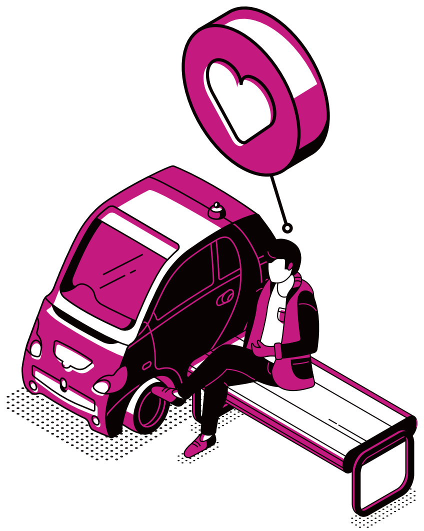
A RELATIONSHIP WE CANNOT LIVE WITHOUT

Despite all the criticism cars receive, the fact that motorists appear to think less fondly of their vehicles nowadays, not to mention an economic and environmental context that seems ominous for the sector, the automobile remains indispensable, unparalleled and timeless. To use a term that is very much in vogue, it continues to display great resilience, and all the more so during the current health crisis. The idea that we will be able to do away with cars, be it today or in the future, is far from evident.

ESSENTIAL, ESPECIALLY FOR THE DAY TO DAY

NEVER WITHOUT IT

In a relationship, just because criticism, resentment and differences of opinion exist, that is not necessarily reason enough to consider living apart. That is what this Observatoire Cetelem teaches us on the topic of cars. Despite their criticisms of cars, nearly 6 out of 10 people cannot see themselves living without one **(Fig. 20)**. However, the view that they are essential has lost ground since the 2017 survey, "*I love my car*". 8 out of 10 respondents held this opinion at the time. But in a climate that has seen car bashing become more fashionable, the score remains relatively high. Two-thirds of French, Belgian, Japanese and South African respondents believe that life without a car is impossible. Conversely, the same proportion of Turks and Poles believe that it is something to aspire to. On this issue, the income factor again creates a great deal of segmentation. 53% of the wealthiest respondents cannot live without a car, compared with just 36% of individuals in the lowest income group.

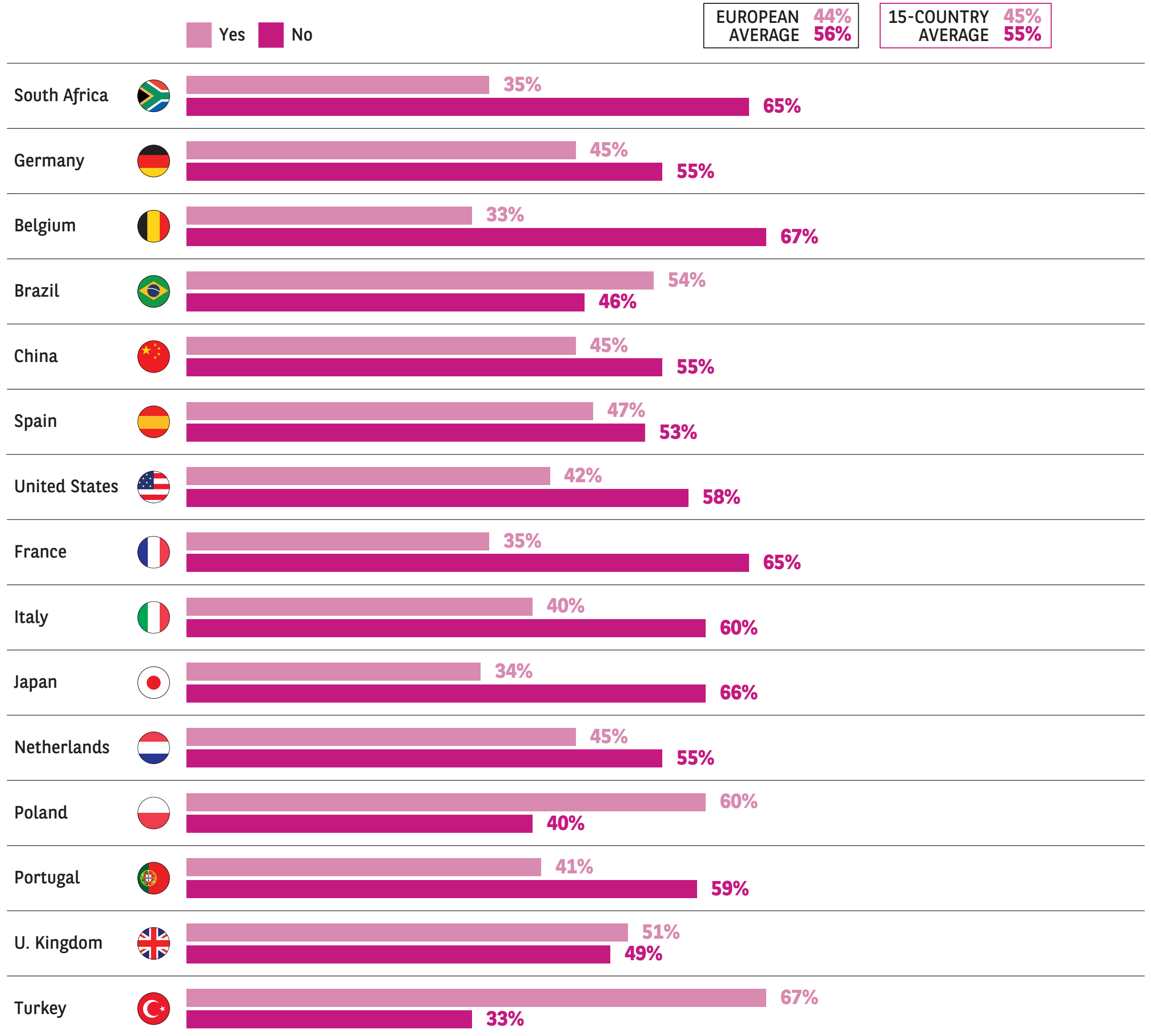


6 OUT OF **10**

PEOPLE **CANNOT IMAGINE LIVING WITHOUT A CAR**
(VS. 8 OUT OF 10 IN 2017)

Fig. 20

Would you be prepared to live without a car?
Select one answer only. Proportion of "Yes" answers.
Source: L'Observatoire Cetelem de l'Automobile.



CAR USE IS STABLE OVERALL, BUT IT IS RISING IN EMERGING NATIONS

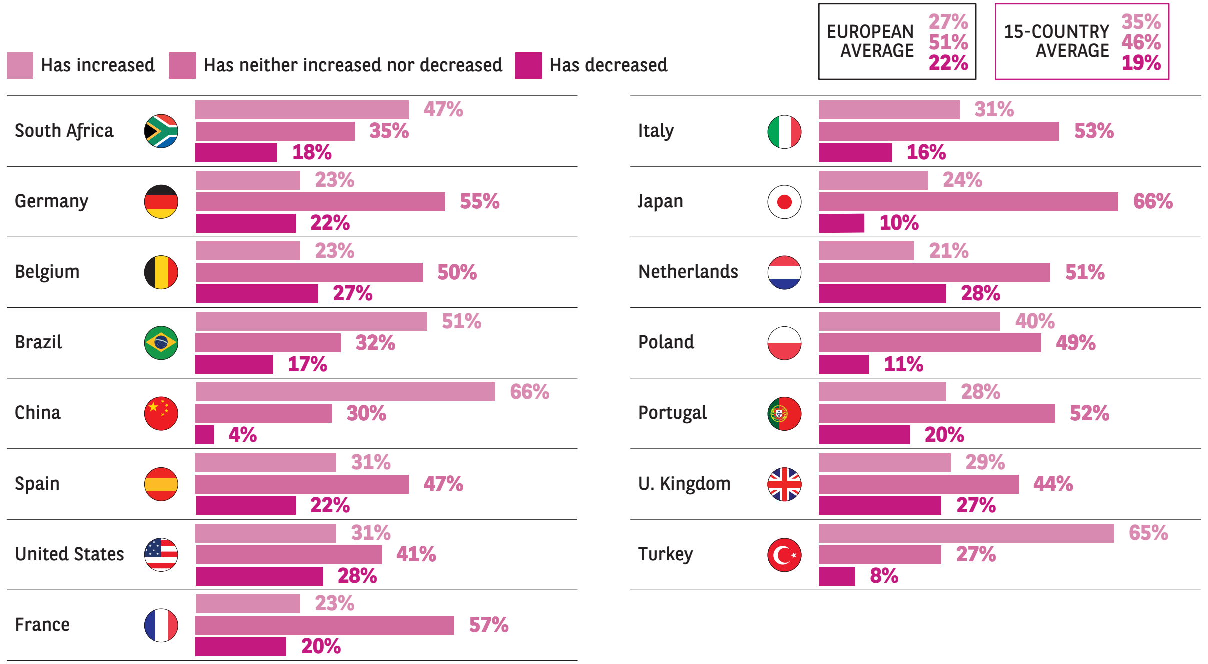
People's relationship with their cars has remained stable. 1 in 2 people believe that they have used their vehicle neither more nor less over the last few years **(Fig. 21)**. However, a detailed analysis shows that there are vast differences from one country to the next. Western countries display the greatest stability, while a significant increase in car use can been observed in the emerging countries, China and Turkey in particular. These two countries appear to have a love-hate relationship with cars, believing that they take up too much space, in every sense of the word, while also seeming incapable of giving them up.

Fig. 21

Over the last few years, would you say that your car use?

Select one answer only.

Source: L'Observatoire Cetelem de l'Automobile.



CARS PRIMARILY FULFIL A PURPOSE

Above all, car use tends to be driven by pragmatism. If motorists are attached to their vehicles, it is chiefly for practical reasons (71%) **(Fig. 22)**. It is interesting to compare this result with that obtained by the 2017 survey, when 9 out 10 respondents lauded cars for their practicality. The French are the most likely to point to practicality (82%), while the Chinese are less convinced (58%).

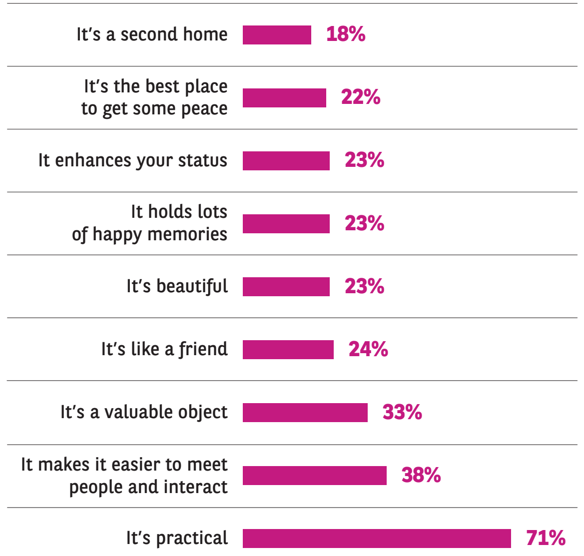
A stronger emphasis is placed on different criteria depending on the country. More than half of German, Polish and Brazilian respondents believe that their cars help them meet people and facilitate interaction. At the two ends of the GDP scale, equal proportions of South Africans and Americans view them as valuable objects. The Chinese are the most likely to see them as both a friend and a place where they can get some peace, suggesting an intimate and personal relationship with their vehicles in a country where collectivism is crucial. The South Africans share many memories with their cars. The Portuguese view them as a way of boosting their image.

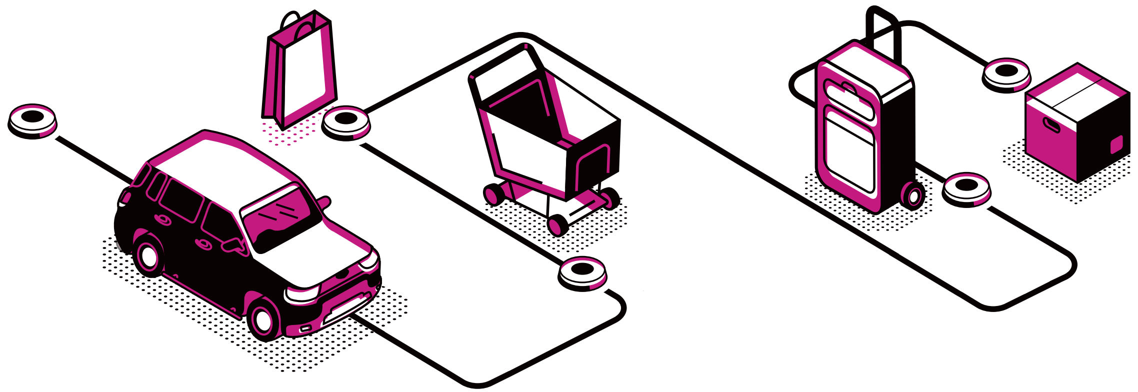
Fig. 22

Why are you attached to your car?

Worldwide figures. Select one or more answers. Answers of those who assigned a score of 5 or more to their attachment to their car.

Source: L'Observatoire Cetelem de l'Automobile.





AN IRREPLACEABLE PART OF EVERYDAY LIFE

Every day, car users are reminded of the services their vehicle provides. Whether it be for commuting, shopping or taking children to school, there is no alternative to cars in the eyes of 85% of respondents, with this view being particularly prevalent in the emerging countries, China and Italy **(Fig. 23)**. Only the Spanish are a little less convinced of their day-to-day practicality (74%). This is such a dominant factor that one could almost forget their various other attributes. The ability to use one's car for long journeys, e.g., during holidays, is only cited by 46% of respondents. The sheer pleasure of driving, meanwhile, is reduced to a measly 16%. Proof, once again, that practical concerns easily trump the notion of enjoyment.

8 OUT OF **10**

PEOPLE CONSIDER **CARS** TO BE **IRREPLACEABLE**

THE COVID CRISIS UNDERLINES THIS DAY-TO-DAY PRACTICALITY

The public health crisis has prompted lockdowns, restricted outings to those that are strictly necessary, caused public transport services to be shut down or reduced drastically, and led to remote working on a massive scale. These new "constraints" have transformed daily life, in some cases radically. Thus, this crisis, together with the changes it has imposed on lifestyles, has reinforced the view that cars are ultimately there for utilitarian reasons.

Individuals who have used their car less during this period have tended to reduce their daily journeys the least. 37% have driven less to fulfil their day-to-day requirements, compared with a 46% reduction for private journeys and leisure, and 55% at weekends and in the holidays. The same pattern can be observed in every country covered by the survey. Conversely, respondents who state that they have been using their vehicle more say that they have done so to meet their day-to-day needs (25% vs. 22% in the case of private journeys and leisure, and 16% in the case of weekends and holidays) **(Fig. 24)**. Turkey and China stand apart in this respect, with respondents reporting that they have significantly increased their car use during the health crisis, primarily to meet their day-to-day needs (60% and 51%).

Fig. 23

What are the main purposes for which you use your car(s)?

Select a maximum of two answers.

Source: L'Observatoire Cetelem de l'Automobile.

	You use your car for your daily journeys: to go to work, to do your shopping, to transport your children, etc.	You use your car to make long journeys such as going on holiday, going away for the weekend, etc.	You use your car simply for the pleasure of driving	You carpool as a driver
South Africa	91%	38%	18%	10%
Germany	83%	52%	16%	3%
Belgium	85%	49%	13%	4%
Brazil	91%	39%	17%	8%
China	93%	58%	13%	8%
Spain	74%	46%	11%	6%
United States	87%	38%	22%	6%
France	85%	51%	13%	8%
Italy	90%	45%	12%	2%
Japan	86%	53%	10%	12%
Netherlands	74%	46%	27%	5%
Poland	83%	44%	29%	13%
Portugal	85%	40%	7%	9%
U. Kingdom	85%	51%	20%	7%
Turkey	87%	49%	9%	7%
Europe	83%	47%	16%	6%
15-country	85%	46%	16%	7%

Fig. 24

Since the COVID-19 crisis began, would you say that your car use?

Select one answer only.

Source: L'Observatoire Cetelem de l'Automobile.

Proportion who answered "Has decreased" / Proportion who answered "Has increased"

	For daily journeys and commuting to work		For private journeys and leisure (food and other shopping, sporting activities, etc.)		To go away for the weekend and on holiday	
	Has decreased	Has increased	Has decreased	Has increased	Has decreased	Has increased
South Africa	60%	18%	64%	19%	82%	6%
Germany	25%	18%	30%	17%	44%	14%
Belgium	41%	14%	49%	14%	53%	12%
Brazil	44%	30%	56%	25%	75%	11%
China	32%	51%	48%	40%	53%	30%
Spain	37%	21%	45%	22%	51%	18%
United States	38%	24%	50%	20%	53%	17%
France	30%	18%	39%	16%	44%	14%
Italy	40%	25%	46%	25%	52%	19%
Japan	21%	22%	39%	17%	53%	9%
Netherlands	35%	16%	42%	18%	55%	13%
Poland	24%	31%	33%	28%	39%	23%
Portugal	51%	14%	54%	13%	68%	8%
U. Kingdom	48%	24%	53%	20%	59%	15%
Turkey	21%	60%	43%	46%	51%	31%
Europe	37%	20%	43%	19%	52%	15%
15-country	37%	25%	46%	22%	55%	16%

REMOTE WORKING

The health crisis has placed a spotlight on remote working, especially in Western countries. It has transformed what was a growing trend among more and more companies into a real paradigm shift. While it is popular among many employees, this new way of working and organising workforces has not been implemented to the same extent across the board.

In Germany, it is already in place in 80% of companies. In France in 2019, 5.2 million people already worked remotely. In Japan, 33% of companies have deployed a teleworking policy. In the United States, remote working increased five-fold over the five years preceding COVID-19, with 25 to 30% of employees set to adopt the practice by the end of 2021.

Fig. 25 / Context

Prevalence of remote working in the countries covered by the survey in early 2020 (Pre-COVID-19)

Source: McKinsey Global Remote Working Data & Statistics (Updated Q1 2020).

	Proportion of companies with a remote working policy	Proportion of employees who consider remote working to be the new norm
12-COUNTRY AVERAGE	61%	75%
WORLD AVERAGE	62%	62%
South Africa	62%	79%
Germany	80%	68%
Belgium	53%	78%
Brazil	67%	72%
China	51%	77%
Spain	61%	74%
United States	69%	74%
France	60%	68%
Italy	59%	72%
Japan	32%	80%
Netherlands	75%	73%
U. Kingdom	68%	73%

AN ECONOMIC SECTOR WITH GREAT CLOUT

People's "attachment" to cars seems subject to even greater pragmatism, not to say necessity, when we consider the economic importance of the sector in almost all Observatoire Cetelem countries. This can obviously be measured in terms of the number of vehicles sold, which is the tip of the iceberg for consumers/motorists. However, if we look beyond the major assembly lines, the sheer size of the automotive industry becomes clear when we take into account all the subcontractors automakers use, not only upstream, but also downstream, i.e., the domain of dealers, mechanics, rental companies, etc.

There is a saying in French: when the building trade is doing well, everything does well. Similarly, it is tempting to say that when the automotive industry is firing on all cylinders, the rest follows. In the European Union alone, the sector accounts for 8.5% of total industrial output and directly employs 2.7 million people. The industry has an industrial presence in every European country featured in L'Observatoire Cetelem, as it does in all the other nations. This is a stark reminder of the economic importance of the auto industry and, above all, of the social and human consequences of a crisis like the one we are experiencing.

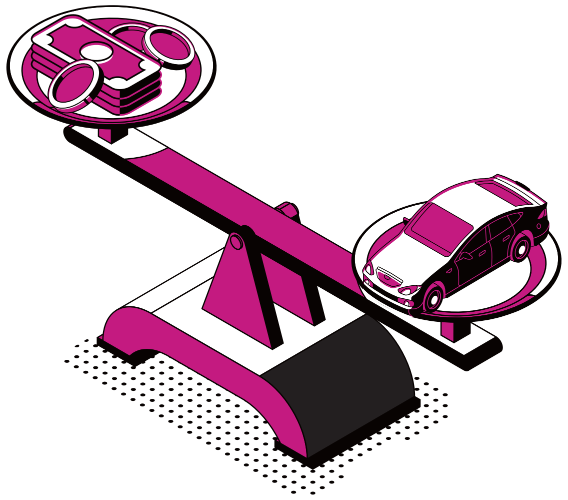
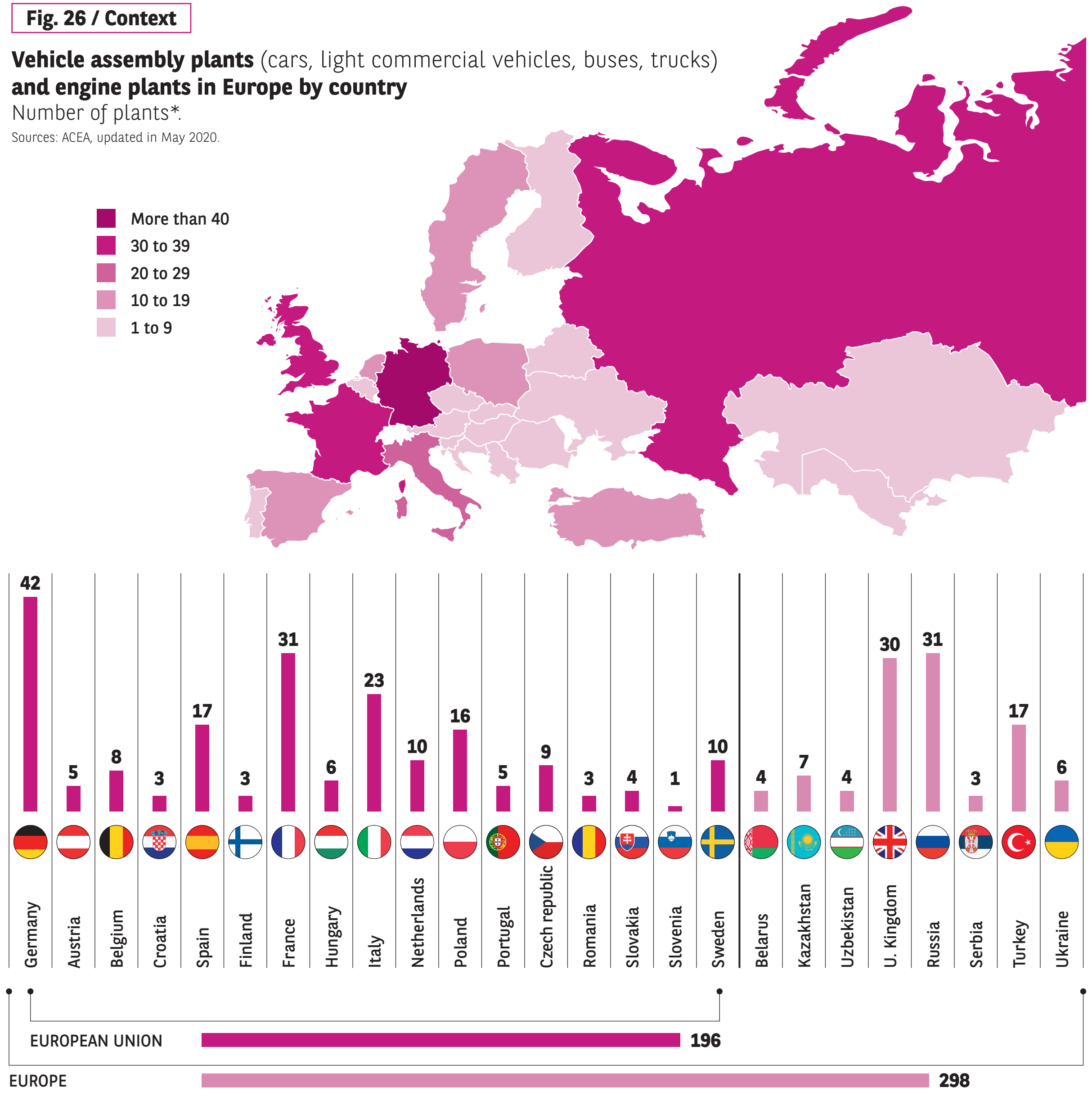


Fig. 26 / Context

Vehicle assembly plants (cars, light commercial vehicles, buses, trucks) **and engine plants in Europe by country**
Number of plants*.
Sources: ACEA, updated in May 2020.



* Automotive suppliers, many manufacturers of vehicles and small engines, and custom bodybuilders are not included in this overview due to complexity. This map includes the engine production sites of most ACEA members, but omits the transmission, bodywork, and other vehicle parts plant.

Fig. 27 / Context

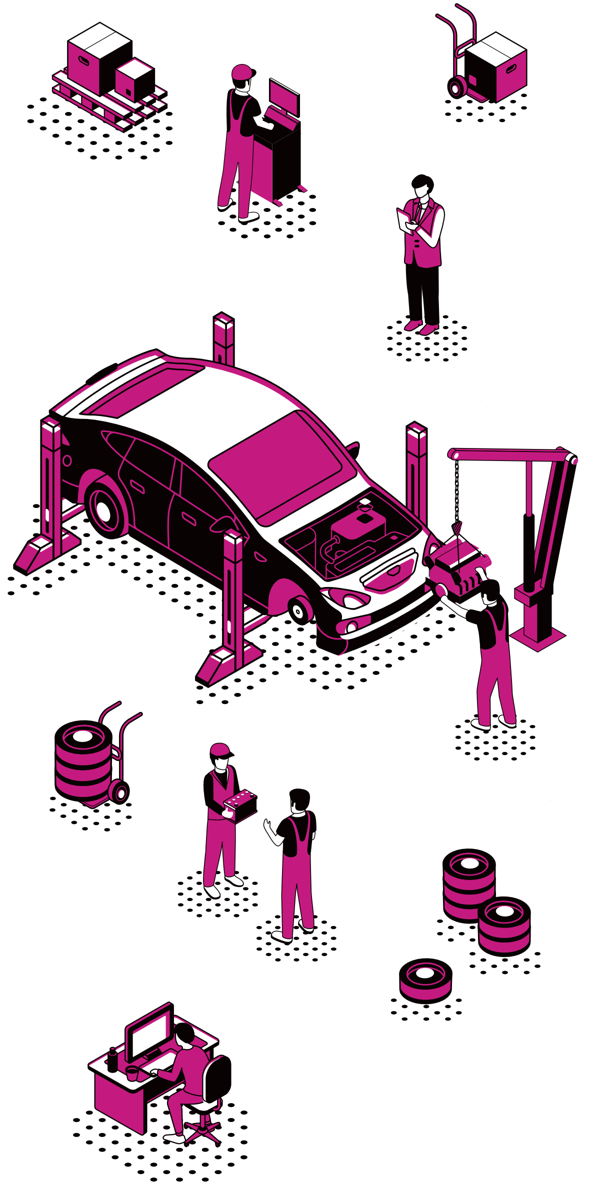
Domestic automotive output in 2019 by country (passenger vehicles + light commercial vehicles)
Number of vehicles sold.
Source: OICA.

	Passenger vehicles	Light commercial vehicles	Total
Belgium	247,020	38,777	285,797
Portugal	282,142	63,562	345,704
South Africa	348,665	283,318	631,983
Poland	434,700	215,164	649,864
Italy	542,007	373,298	915,305
U. Kingdom	1,303,135	78,270	1,381,405
Turkey	982,642	478,602	1,461,244
France	1,675,198	527,262	2,202,460
Spain	2,248,019	574,336	2,822,355
Brazil	2,448,490	496,498	2,944,988
Germany	4,661,328	-	4,661,328
Japan	8,328,756	1,355,542	9,684,298
United States	2,512,780	8,367,239	10,880,019
China	21,360,193	4,360,472	25,720,665
World	67,149,196	24,637,665	91,786,861

Fig. 28 / Context

Automotive jobs as a proportion of all industrial jobs, by country (2018 data)
Does not take into account jobs in non-manufacturing sectors (retail, rental, etc.).
Source: ACEA.

	Proportion (%)
Germany	12%
Spain	8%
Poland	8%
France	7%
U. Kingdom	6%
Belgium	6%
Portugal	6%
Italy	5%
Netherlands	4%
European Union	9%



A PLACE OF REFUGE

While economic and use value alone could explain why it is so difficult for people to live without cars, the health crisis has highlighted other reasons why this might be the case. In the 2017 survey "*I love my car*", 9 out of 10 people associated cars with freedom. This is still the case four years later. 47% even believe that the heath crisis has boosted the incomparable freedom that cars offer **(Fig. 29)**.

So they represent freedom, but they also serve as a place of refuge. Indeed, 76% say that when they are in their car they feel protected from the outside world. Again, this is a feeling that has intensified over the course of the crisis according to 46% of respondents.

The familiar pairing formed by China and Turkey are joined by Poland, Brazil and France in espousing these values of freedom and protection **(Fig. 30)**. The Dutch are the least likely, by some distance, to view their vehicles as a place of refuge, a further sign that cars play a less crucial role in the daily lives of people in the Netherlands.

3 IN 4

PEOPLE FEEL PROTECTED WHEN THEY ARE IN THEIR CAR

Fig. 29

Do the following statements reflect the image you have of your car?
Select one answer per statement. Proportion of "Yes" answers.
Source: L'Observatoire Cetelem de l'Automobile.

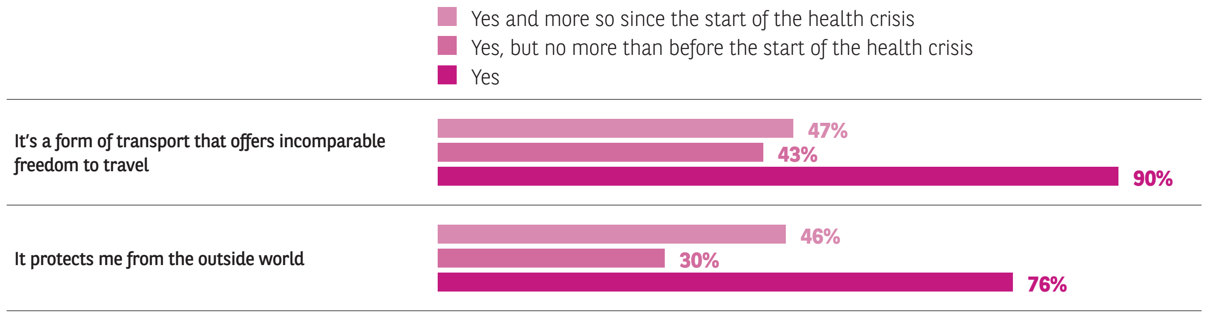
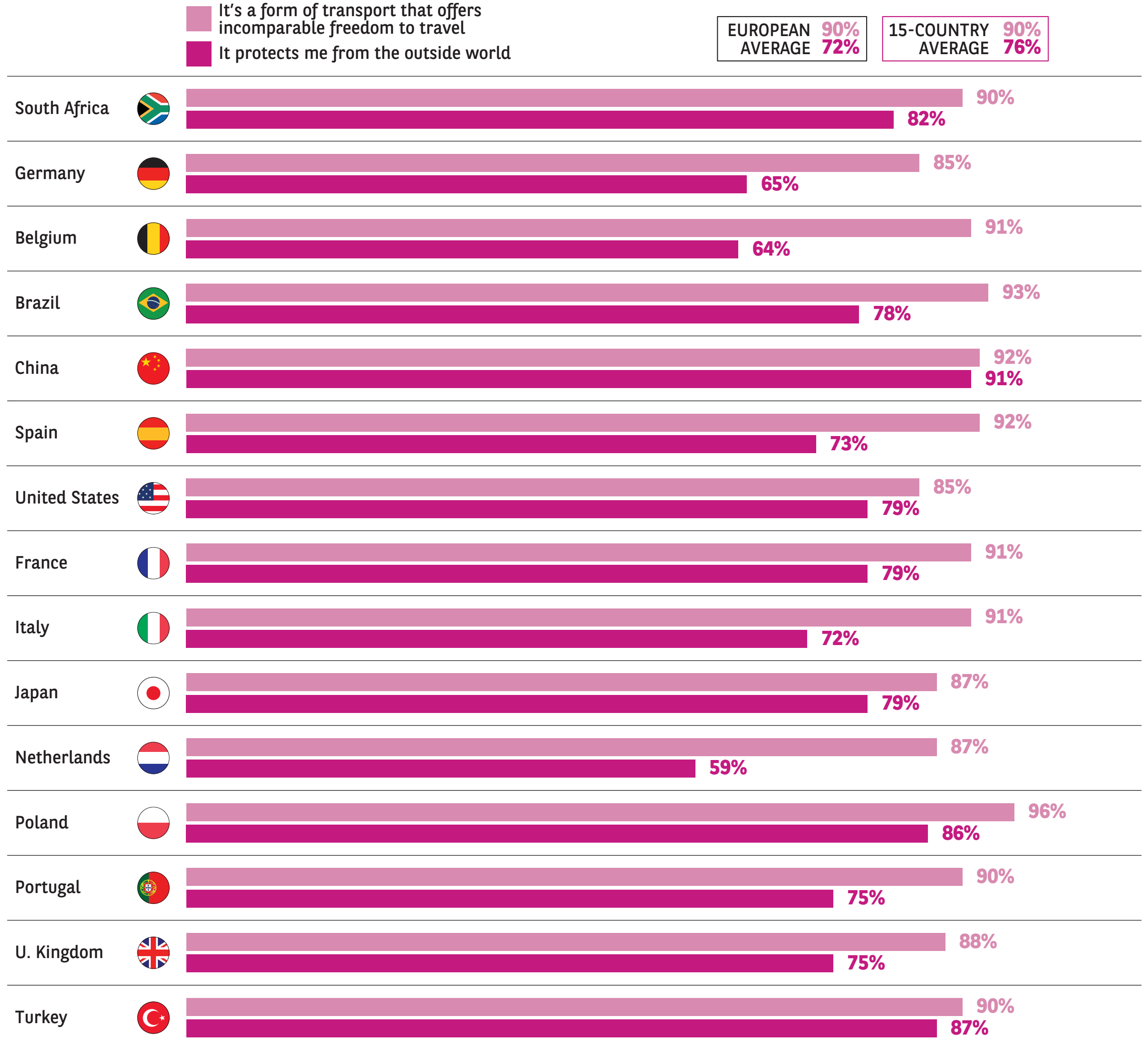


Fig. 30

Do the following statements reflect the image you have of your car?

Select one answer per statement. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.



KEY FIGURES

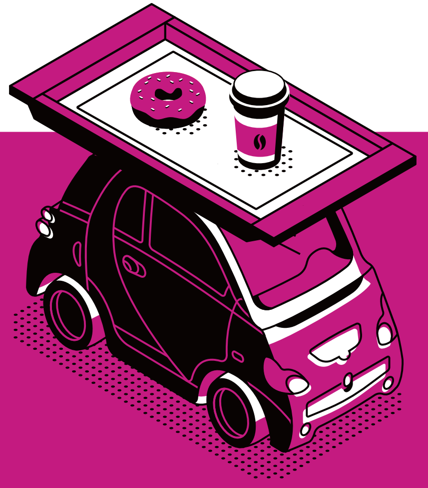
85%
of those surveyed use their car mainly for their day-to-day journeys.

More than
6 out of 10 people
are not prepared to live without a car.

76%
feel protected when they are in their car.

9 out of 10 people
associate cars with freedom.
(like in 2017)

7 out of 10 motorists
are attached to their car mainly for practical reasons.



47%
believe that the health crisis has reinforced the feeling of freedom their car gives them.

3

THE REINVENTION OF A UNION

Derided but irreplaceable Criticised but essential Ostracised but timeless Motorists are in a perpetual love-hate relationship with cars. But like many couples who have gone through difficult times and have always been able to talk their way out of tough situations, it looks as though the pair still have a bright future ahead of them. But this will require the terms and scope of their union to be reinvigorated and a new lifestyle to be adopted.

COMPLEMENTARITY IS THE WATCHWORD

A DESIRE FOR CARS TO COHABIT WITH SUSTAINABLE TRANSPORT SOLUTIONS

As we have seen, the status afforded to cars is being called into question, especially in cities. However, it appears that what people would like is not to remove them from the landscape, but rather to establish an open relationship that leaves room for other, more forward-looking forms of transport, preferably carbon-free. Indeed, 82% of the individuals surveyed believe that we can live with fewer cars and more sustainable transport solutions **(Fig. 31)**. This desire for urban cohabitation, in every sense of the word, is shared in all countries. Once again, this is a topic that brings to light the usual geographic divides. On one side are the strongest proponents of such ideas: the emerging and Mediterranean countries, as well as China. On the other are France, Germany and Belgium, the three countries in which Green parties hold the most power, but where people are less vehement in expressing such convictions, given that this form of cohabitation seems self-evident and has already been partly implemented. Sales of traditional and electric bicycles (e-bikes), which were already booming before the health crisis, in addition to the development of cycle lanes in these countries and others, are proof of this.

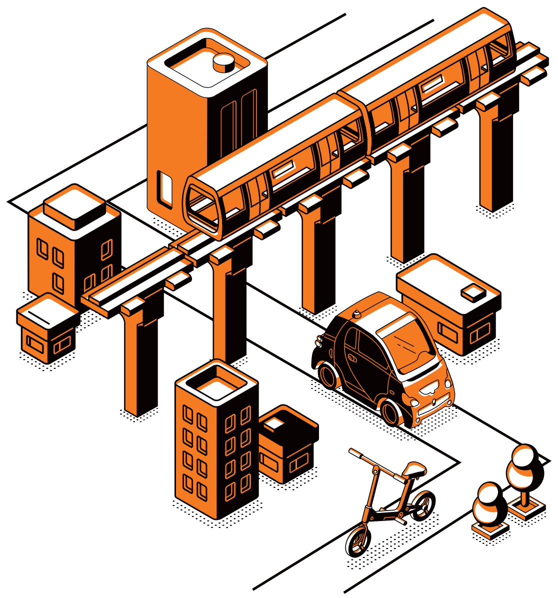


Fig. 31

Are you in favour of or opposed to urban planning that makes more space for sustainable modes of travel (walking, cycling, scooters, etc.), even if it means penalising or restricting the use of cars?
Select one answer only. Proportion "In Favour".
Source: L'Observatoire Cetelem de l'Automobile.

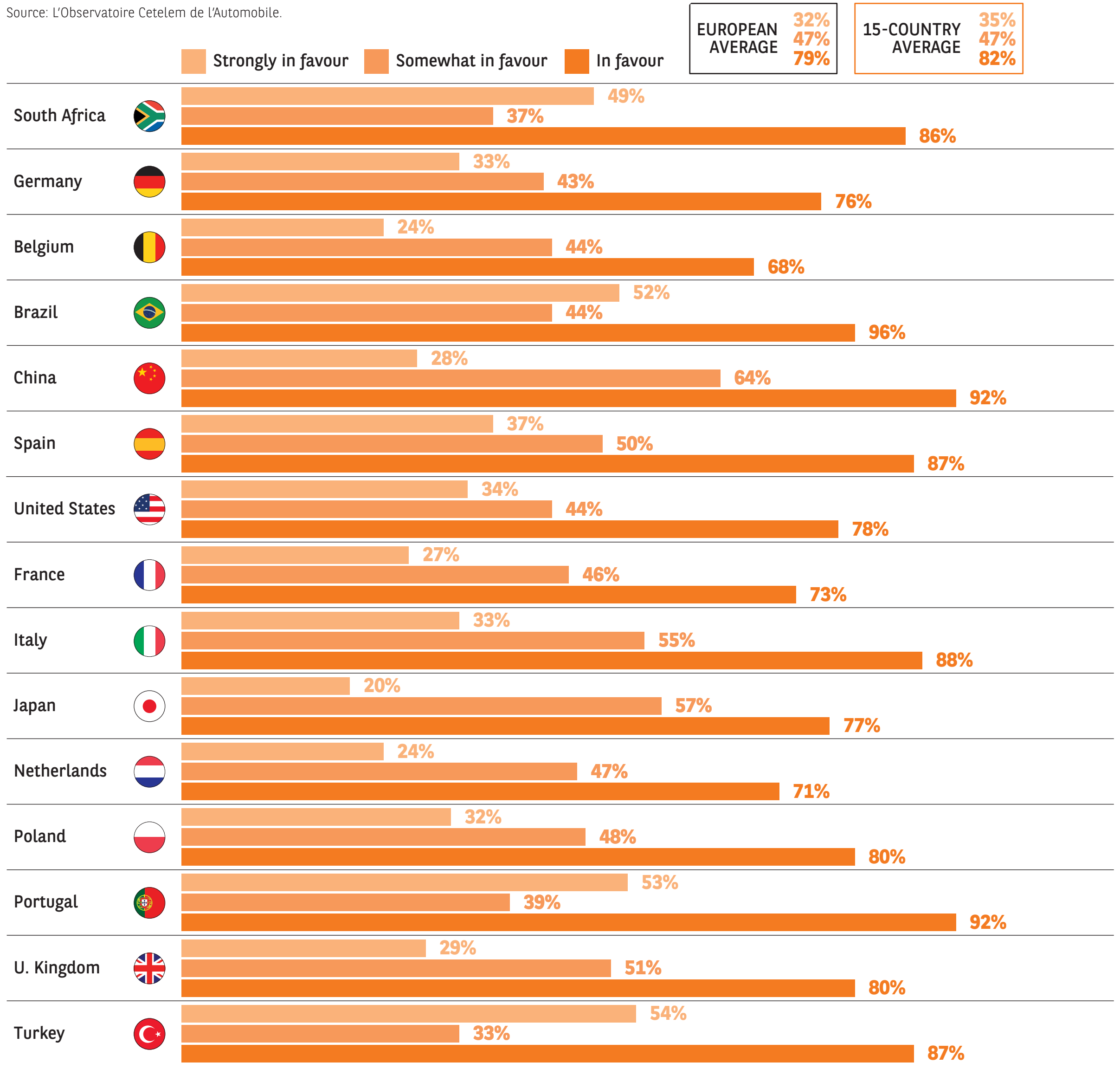


Fig. 32 / Context

Cycling infrastructure developed in response to COVID-19

Sources: (1) Le Parisien, (2) Paris City Hall, (3) Welovecycling, (4) The Boston Globe.

France	Temporary cycle paths set up in several major French cities, including 150 km in Paris and its suburbs(1)
	Paris(2) "RER Vélo" project officially launched: 650 km of cycle paths
Belgium	**Brussels**(3) 40 km of new cycle paths and promotion of bicycle use
Italy	**Milan**(3) Redevelopment of 35 km of public space, creation of new cycle paths and reduction of speed limits
United States	**Boston**(4) Development of temporary cycle paths, with the intention of making them permanent

Fig. 33 / Context

Key figures for the electric bicycle (e-bike) market in Europe

Sources: (1) Confederation of the European Bicycle Industry, (2) Market and Markets, (3) ECF, (4) Shimano.

x2
e-bikes sales in Europe by 2025.(1)

3 million
e-bike sold in Europe in 2019.(2)

17%
share of the bicycle market.(3)

23%
of e-bike sales between 2018 and 2019.(3)

1 in 4 Europeans
would like to buy an e-bike or already own one in 2020.(4)

URBAN TRAFFIC RESTRICTIONS ARE ESSENTIAL, BUT ALSO TOO COMMON

On the question of traffic restrictions, there is a similar degree of ambivalence: car use must be controlled, but not to excess. While 3 in 4 people believe that road space rationing, congestion charges and bans on certain vehicles are essential and useful, more than half also believe that they are too widespread and sufficiently restrictive **(Fig. 35)**. There seems to be a belief that the tipping point between "carrot and stick" is about to be reached and there is no need to go any further. However, this has not prevented some countries from planning a stricter future in which diesel and petrol vehicles will be *persona non grata* in cities.

Fig. 34 / Context

Key figures for low-emission zones

Does not take into account jobs in non-manufacturing sectors (retail, rental, etc.).

Sources: Transport & Environment, ADEME, Financial Times.

+40%
traffic-restricted zones between 2011 and 2020.

Almost 250
zones with traffic restrictions in Europe in April 2020, concentrated in the main cities.

A planned end to the sale of diesel and petrol vehicles

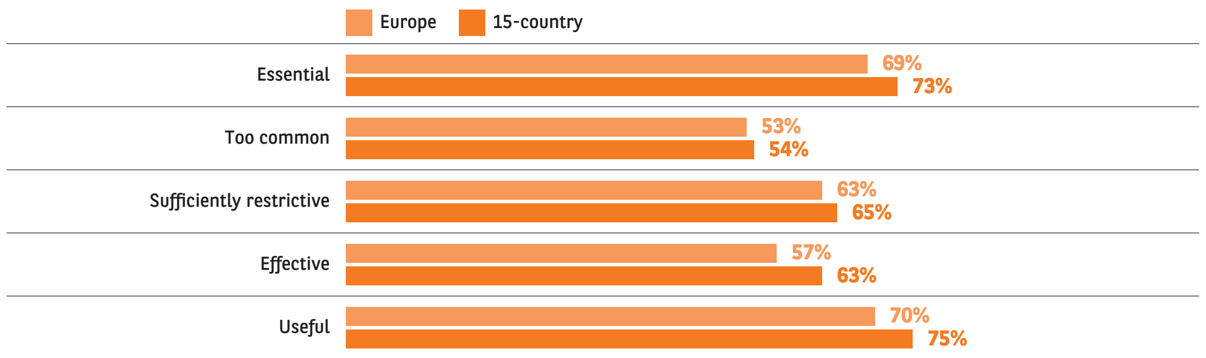
2030	2040	2030
Netherlands	France	United Kingdom

Fig. 35

Do you consider measures to restrict vehicle traffic so as to curb pollution (road space rationing, congestion charges, banning certain vehicles, etc.) to be...

Select one answer only. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.



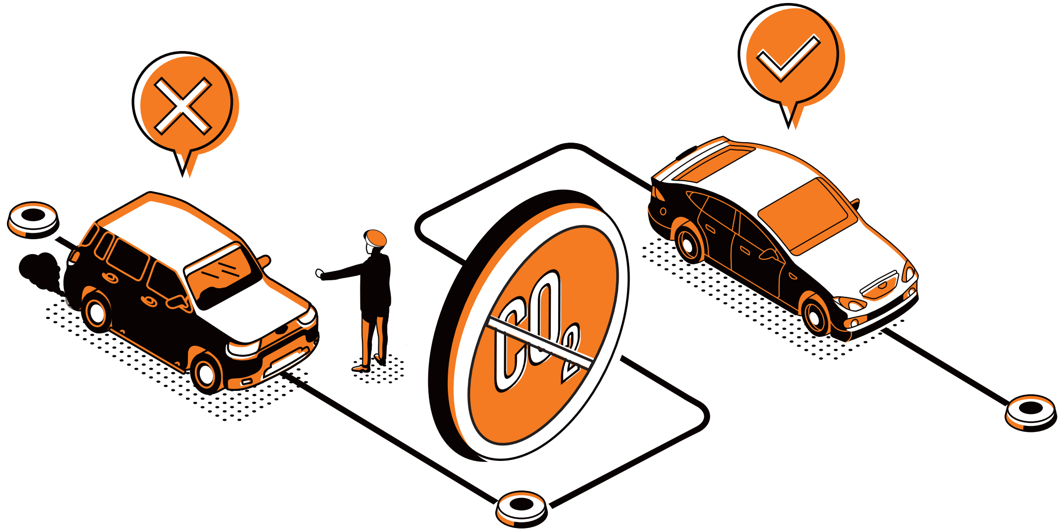
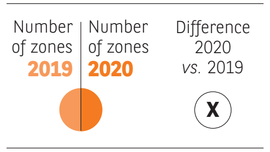
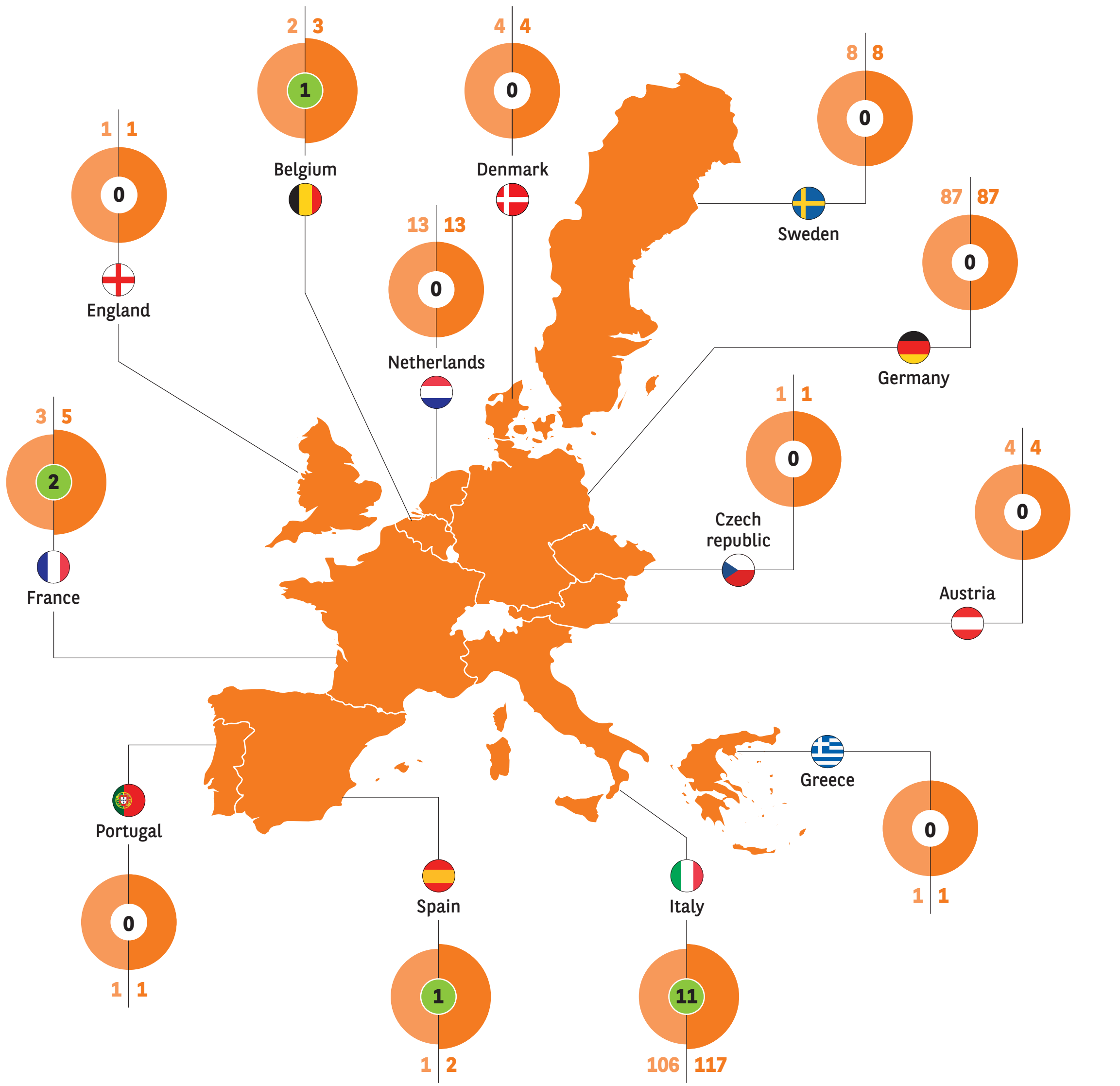


Fig. 36 / Context

Numbers of low-emission zones in European countries

Source: ADEME.





A SHIFT TOWARDS USED CARS

SALES ARE HOLDING UP DESPITE THE CRISIS

Rekindling our relationship with cars also seems dependent on the power of attraction that used vehicles hold now and in the future. On average worldwide, a quarter of upcoming purchases will involve used vehicles. The Portuguese, Poles, South Africans, Dutch and French are the most likely to opt for a second-hand car, with scores of over 30%. Meanwhile, around 90% of Chinese, Spanish and Japanese respondents are not prepared to do so.

Even more interestingly, in many countries during the first few months of the crisis, the used market demonstrated its resilience relative to new-car sales. In their own way, used vehicles are something of a safe haven, sheltered from the crisis and its consequences. In these uncertain times, the end of which is not yet in sight, this shift in the perception of used vehicles is bound to attract many new buyers.

Fig. 37 / Context

Variation in new and used vehicle registrations in the first half of 2020 (% variation between 2019 and 2020)

Sources : CCFA, KBA, ANFIA, ANFAC, GANVAM/IEA, SMMT.

	Used	New
France	-17%	-39%
Germany	-11%	-64%
Italy	-32%	-45%
Spain	-32%	-51%
U. Kingdom	-29%	-49%

THE SECOND-HAND MARKET BOUNCES BACK

Opting for a used vehicle has always been a natural tendency in tough economic times. 2020 is no exception. In pretty much every country, used-car sales have held up better than those of new vehicles.

Older vehicles (more than 10 years old), whose quality and durability have grown steadily in recent years, are the only way for the lowest income households to access a car. The gradual rise in the average age of cars on the road in the United States and Western Europe reminds us that the used market now covers all categories of vehicle.

Moreover, the growing proportion of new vehicles that are acquired by companies, which are keeping their cars for ever shorter periods of time, is providing the used-car market with more and more low-mileage and well-maintained vehicles. The number of leasing contracts that are coming to an end is also on the rise. Indeed, three or four years after having been acquired new, these cars are finding a second home via the second-hand market. This is a boon both for households and dealers. And although used-car prices and profit margins are lower, dealerships do not have to share the proceeds with a manufacturer. Once considered of secondary importance, the used car market is slowly becoming a crucial one for retailers and motorists alike.

A CLEAR ECONOMIC VALUE

At a time when households are under increased financial strain, used vehicles make a significant difference, given that the budgets available for new cars are lower than was previously the case. Thus, the key advantages put forward are a significantly lower purchase price (48%), and the fact that new cars depreciate faster (34%). These financial arguments inevitably enhance the power of attraction of the used market.

THE APPEAL OF CARS UNDER A YEAR OLD

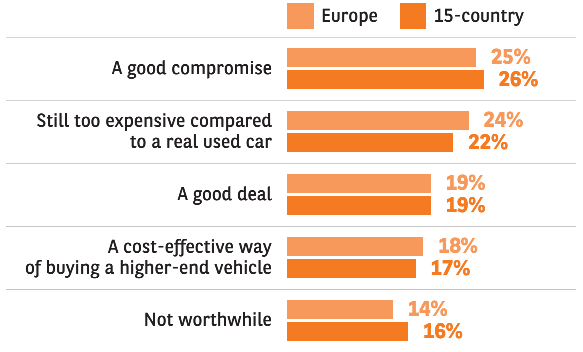
An interesting variation on the used-car theme, cars under a year old make a few winning arguments that many are drawn in by. The number of people who consider them to be a good compromise between new and used vehicles is similar to the proportion who consider them too expensive compared to "real" second-hand cars (26% and 22%, respectively) **(Fig. 38)**. Overall, 1 in 5 people believe them to be an attractive proposition.

Fig. 38

You believe that buying a used car less than one-year old is...

Select one answer only.

Source: L'Observatoire Cetelem de l'Automobile.



BUYING DIFFERENTLY

MULTIPLE PURCHASING CRITERIA FOR A REDUCED BUDGET

During this health crisis, financial aspects have remained a central part of the purchasing process. To cut their vehicle budget, consumers make choices based on numerous criteria, none of which are particularly predominant. At the top of the list are vehicle size, the option of buying a used car and choosing a less prestigious or low-cost brand, all of which post very similar scores (32%, 27% and 26%, respectively) **(Fig. 39)**. These criteria fall in a different order according to income, but the idea of buying a smaller car to reduce the budget takes the top spot overall **(Fig. 40)**.

At the bottom of the list, safety, durability and road handling are the three factors on which people are the least willing to compromise (9%, 10% and 10%, respectively). It is worth noting that giving up on the idea of buying a greener car is only seen as an option by 14% of respondents. This is a topic that is no longer a matter for debate and which opens the way for a new type of relationship, as we will see further on.

OWNERSHIP IS NOT THE PRIORITY

Enjoying a service can trump actual ownership. Being able to use a car without having to think about wear and tear holds a certain appeal. After MaaS (Mobility as a Service), here comes CaaS (Car as a Service), where cars become merely a transport solution devoid of any notion of exclusive ownership and property concerns. And that is without mentioning the many benefits: faster and cheaper access, cost based on usage time or mileage with no investment required, no depreciation to contend with, and more rational sharing of car fleets resulting in a smaller environmental footprint. Having long been the preserve of companies, leasing offers with option to purchase and long-term hire solutions are increasingly winning over households.

Easier and more secure access to motoring for consumers, the advantage of scheduled contract renewal that is almost independent of any economic difficulties that manufacturers and dealers may face... in many ways, leasing looks like something of a panacea for motorists.

AN EMPHASIS ON LOCAL PRODUCTION

Reinvigorating people's fondness for cars also means re-establishing their relationship with their home country. The last Observatoire Cetelem on European consumption highlighted the importance of localism. The automotive industry is no exception. 3 in 4 people state that they would prefer to buy a car manufactured or assembled in their country **(Fig. 41)**. Outside Belgium and the Netherlands, where there are no car assembly plants, the scores are close to or higher than 50%. The Turks display the greatest degree of patriotism, something that is likely to have had some bearing on the creation of the TOGG brand.

Fig. 39

To reduce your vehicle budget, on which vehicle characteristics would you be prepared to compromise?

Worldwide figures. Select a maximum of three answers. Answers of respondents who are planning to buy a car in the next 12 months and whose budget has been cut as a result of the crisis.

Source: L'Observatoire Cetelem de l'Automobile.

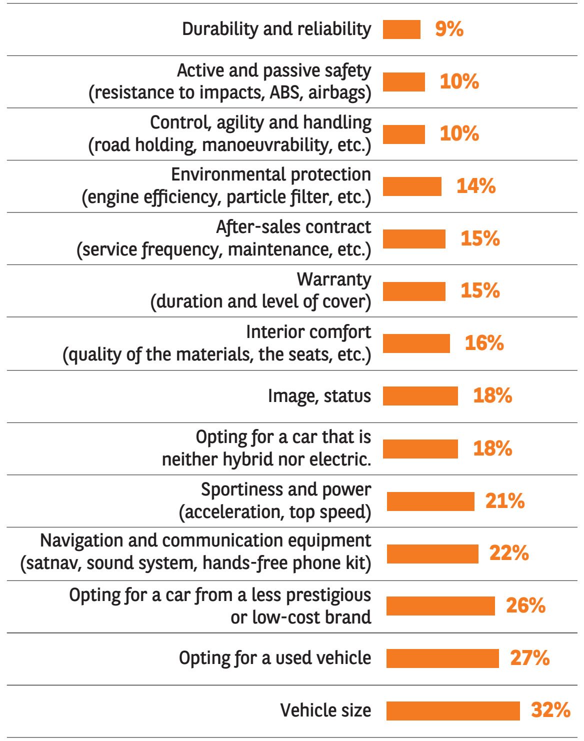


Fig. 40

To reduce your vehicle budget, on which vehicle characteristics would you be prepared to compromise?

Select a maximum of three answers. Top 3 answers according to the income of respondents. Answers of respondents who are planning to buy a car in the next 12 months and whose budget has been cut as a result of the crisis.

Source: L'Observatoire Cetelem de l'Automobile.

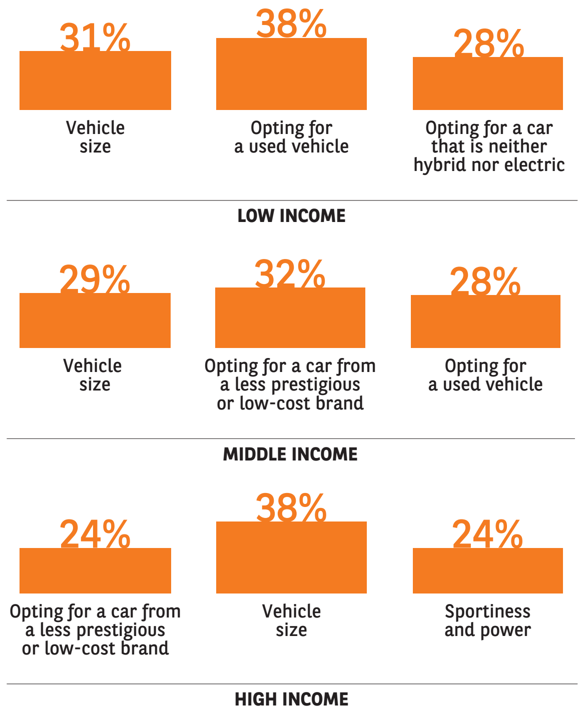
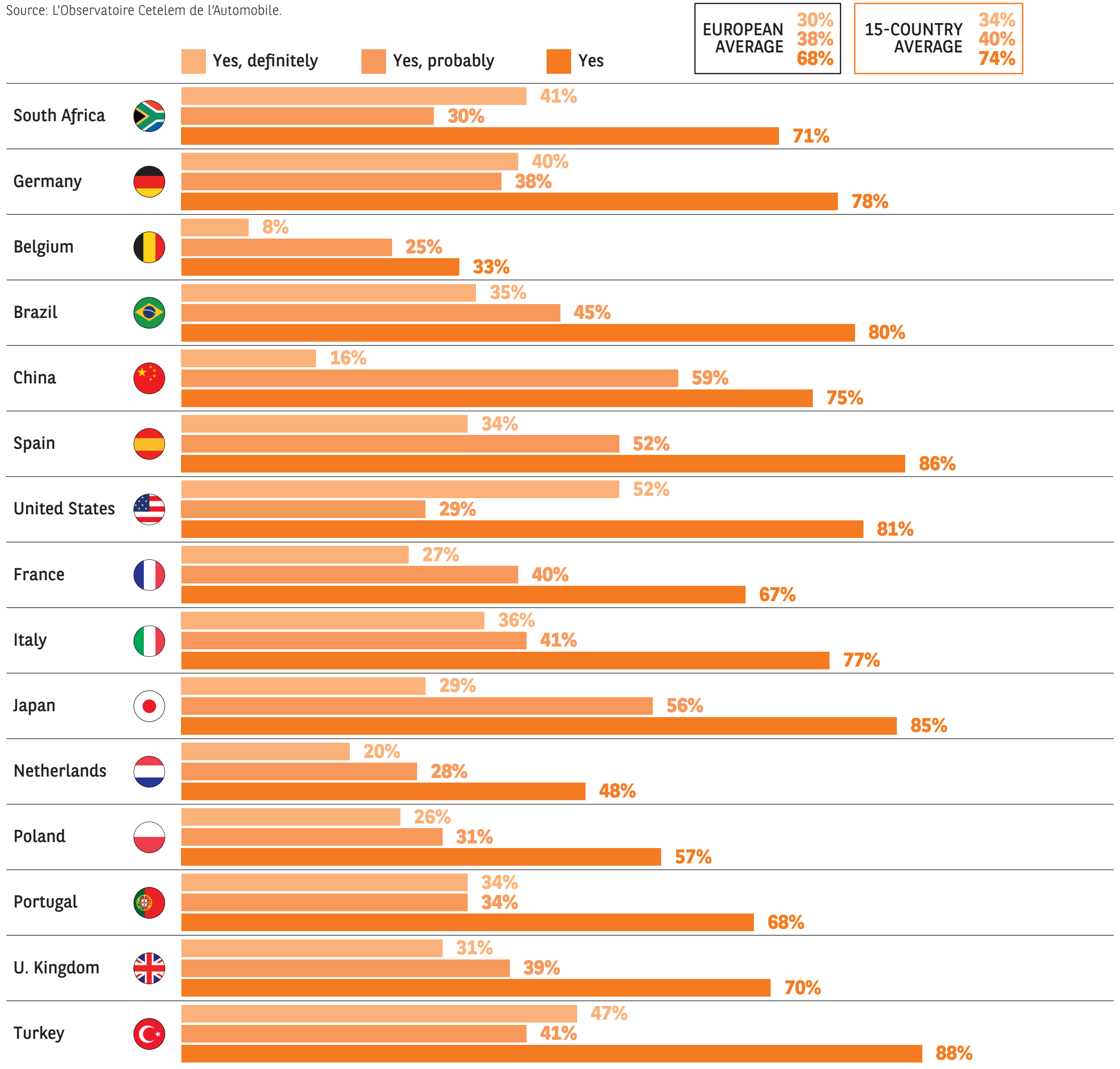


Fig. 41

Are you more likely to buy a car that is manufactured or assembled, wholly or partially, in your home country?

Select one answer only. Proportion of "Yes" answers. Answers of respondents who are planning to buy a car in the next 12 months.

Source: L'Observatoire Cetelem de l'Automobile.

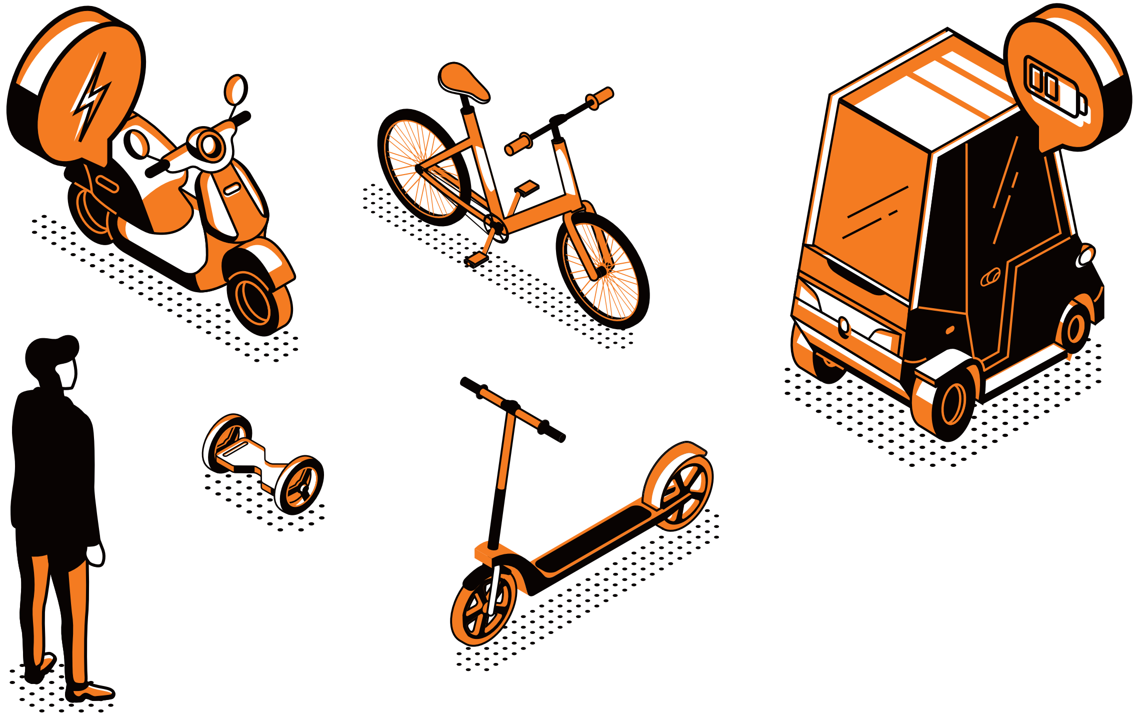


TOGG: TURKEY MARKS ITS TERRITORY

Have you heard of TOGG (Türkiye'nin Otomobili Girisim Grubu)? Possibly not, but the Turks definitely have. Under the impetus of the government and the leadership of President Erdogan, five local companies have formed a consortium to manufacture the first Turkish-built electric cars in Bursa. The government has committed to purchasing 30,000 units of the new vehicles, which were designed by Pininfarina. The brand is looking to conquer the Turkish market as of 2022 with two models, a saloon car and an SUV, before launching them internationally.

A PREFERENCE FOR LESS POLLUTING VEHICLES

The purchasing criteria cited by motorists show that they are not inclined to sacrifice environmental protection. When it comes to acquiring a new vehicle, they take their thinking one step further, stating that they would like the least polluting vehicles to be treated more favourably. This special treatment would mainly involve VAT cuts (81%), preferential road use (67%) and support from local authorities and governments, who should prioritise the purchase of such vehicles (78%).



WELCOME GOVERNMENT SUPPORT

THE SUPPORT ON OFFER MUST HELP THE LOWEST-INCOME HOUSEHOLDS

The last figure cited, which urges local and national authorities to be proactive, illustrates the desire for governments to play an active role in promoting the automotive industry and enhancing its profile.

This is also something they can achieve by offering support to the lowest-income households in the form of grants. 3 in 4 people would be in favour of such an initiative, with essentially the same countries voicing this opinion, i.e., the Mediterranean and emerging nations **(Fig. 42)**. The proportion who are very much in favour exceeds 50% in Turkey, where motorists still have fond memories of the support granted in 2019.

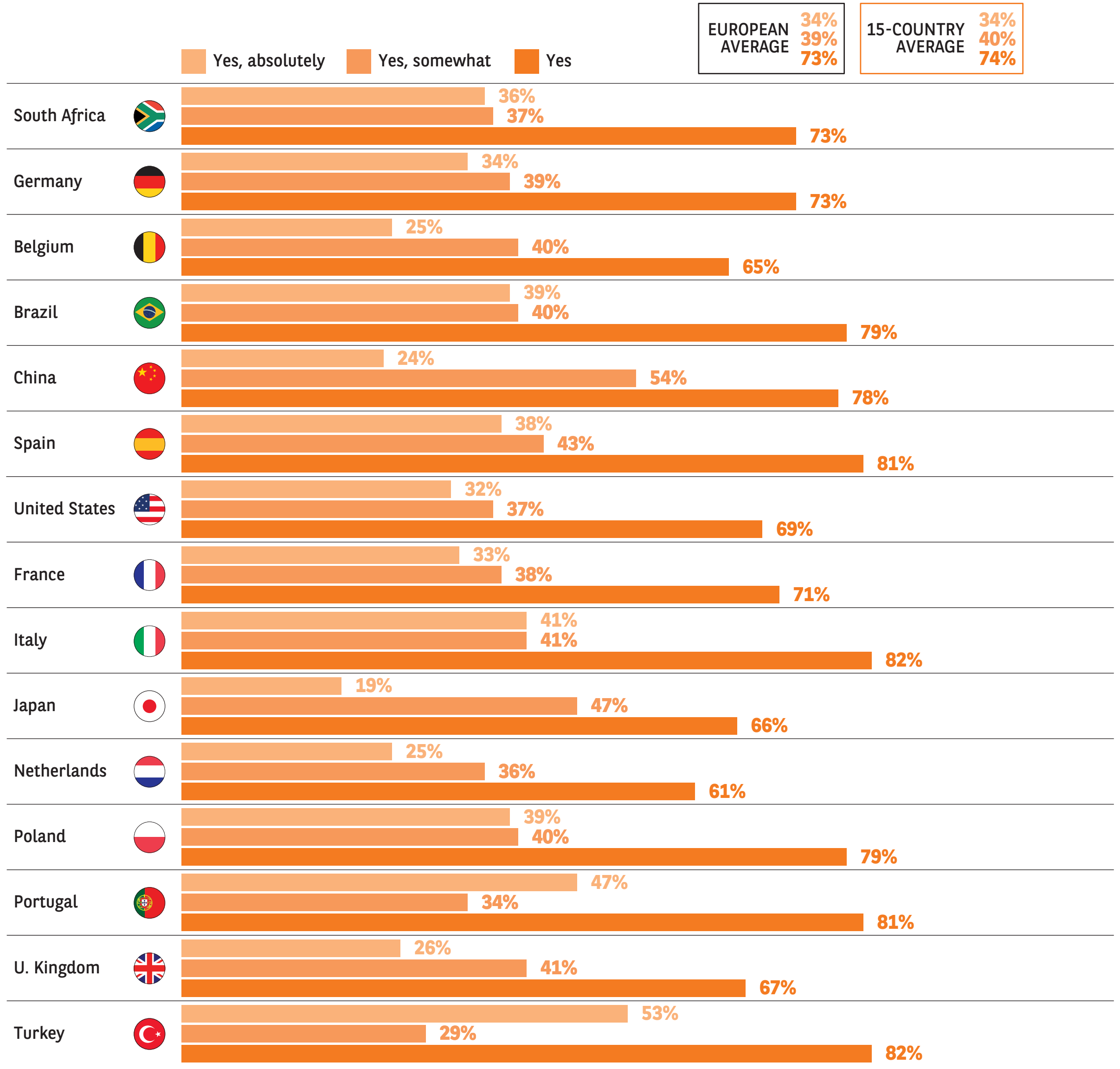
It is not surprising to see that the lowest-income households are the most likely to consider such a measure to be positive.

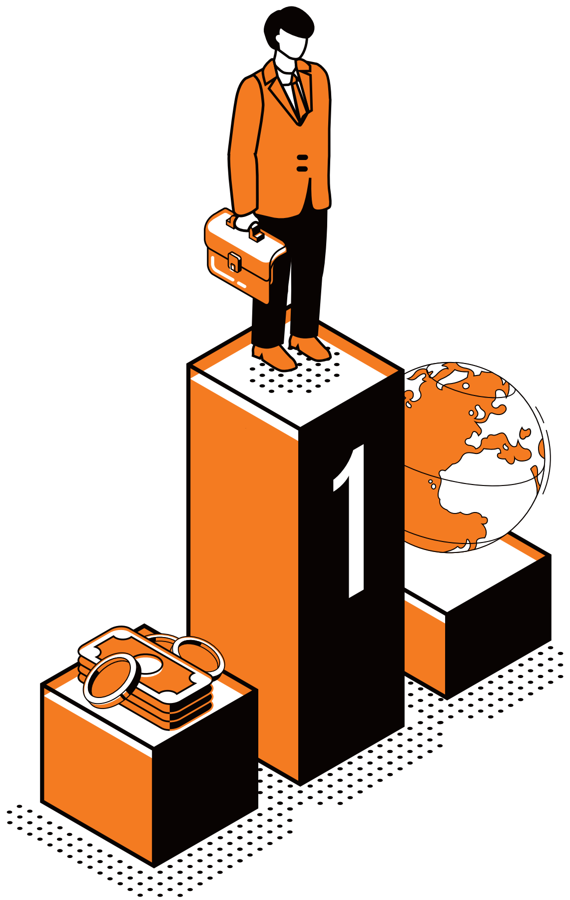
Fig. 42

Should government grants to help people purchase a vehicle be dependent on household income?

Select one answer only. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.





PRIORITY GIVEN TO THE ECONOMY, THE ENVIRONMENT AND LOCALISM

More broadly, with the health crisis having profoundly affected the automotive sector, the idea that governments should provide support and implement far-reaching measures is in no way being called into question. But there is a desire to see some sort of pact between governments and manufacturers that would see support from the former conditioned on the latter's compliance with certain requirements.

The most popular requirement is that all jobs be protected. 84% of people are in favour of such a measure **(Fig. 43)**. This underlines the fact that they are fully aware of the economic and social importance of the car industry. The second most popular requirement in this list confirms this feeling. Indeed, 81% of respondents would like to see brands commit to not increasing their prices.

This does not mean that environmental preservation has been forgotten. Again, 81% of those surveyed would like this to be among the factors on which financial support hinges.

Industrial nationalism is also on the agenda, with reshoring returning to the forefront of the conversation during the COVID-19 crisis. 73% would like vehicles to be manufactured wholly or partially in their home country. 71% would like to see the reshoring of certain production activities.

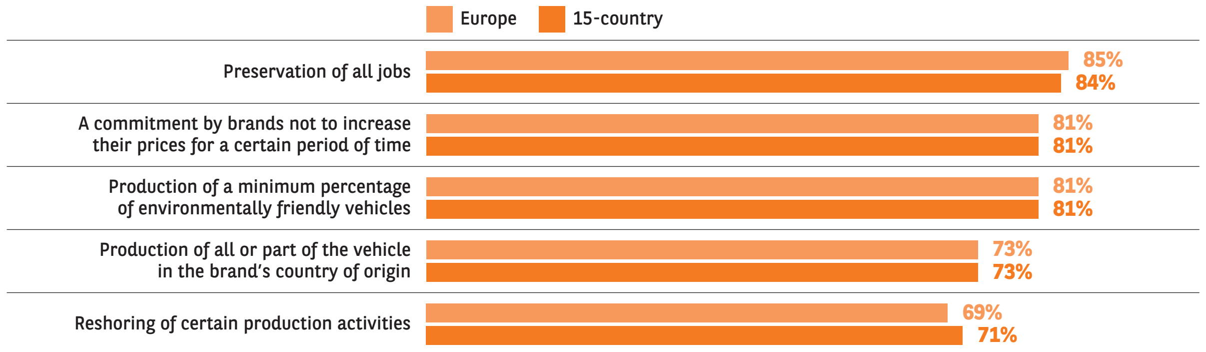
France posts the highest scores on all of these questions. Interestingly, in the United States, which is less Keynesian and more economically liberal, the figures are also very high.

Fig. 43

In your opinion, should all government subsidies to support the automotive industry depend on compliance with the following requirements?

Select one answer per statement. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.



A MORE VIRTUOUS FUTURE

1 IN 2 ARE READY TO BUY A HYBRID OR ELECTRIC VEHICLE

In order to bounce back and enjoy a long and fruitful relationship with motorists, the automotive sector must have no hesitation in going green. Almost half of those surveyed say that their next car will be hybrid or electric **(Fig. 44)**. The Spanish are by far the most enthusiastic about the former, with 42% considering buying such a vehicle. The Chinese and British are the keenest to switch to electric (27% and 28%). The Dutch and South Africans are the most likely to prefer petrol (43% and 44%). The Turks are almost alone in supporting diesel in significant numbers (28%).

A close analysis reveals significant differences between the income groups **(Fig. 45)**. The intentions of the wealthiest individuals are more “eco-compatible” than those on low or middle incomes. Petrol is still the preferred choice of the latter two categories. The higher cost of electric and hybrid vehicles is therefore still a major obstacle.

Fig. 44

What will be the energy source of the next vehicle you plan to buy?
Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.
Source: L'Observatoire Cetelem de l'Automobile.

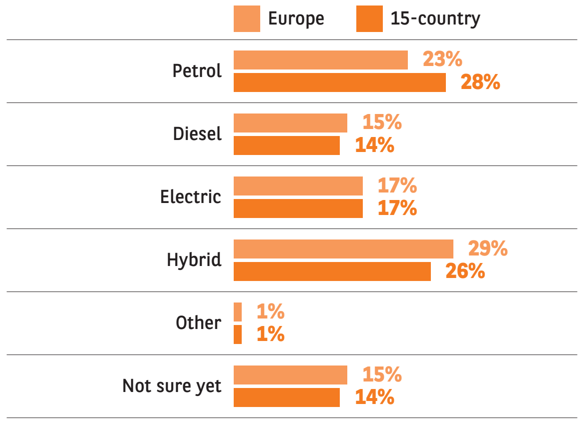
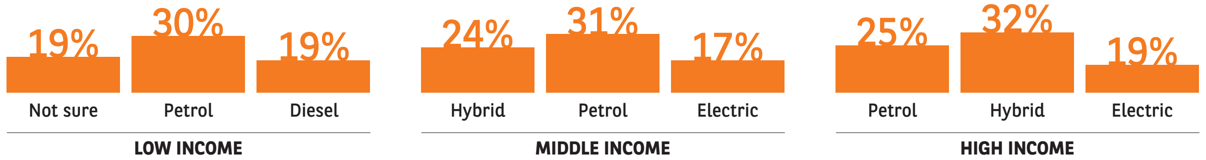


Fig. 45

What will be the energy source of the next vehicle you plan to buy?
Worldwide figures. Select one answer only. Top 3 answers according to the income of respondents.
Source: L'Observatoire Cetelem de l'Automobile.

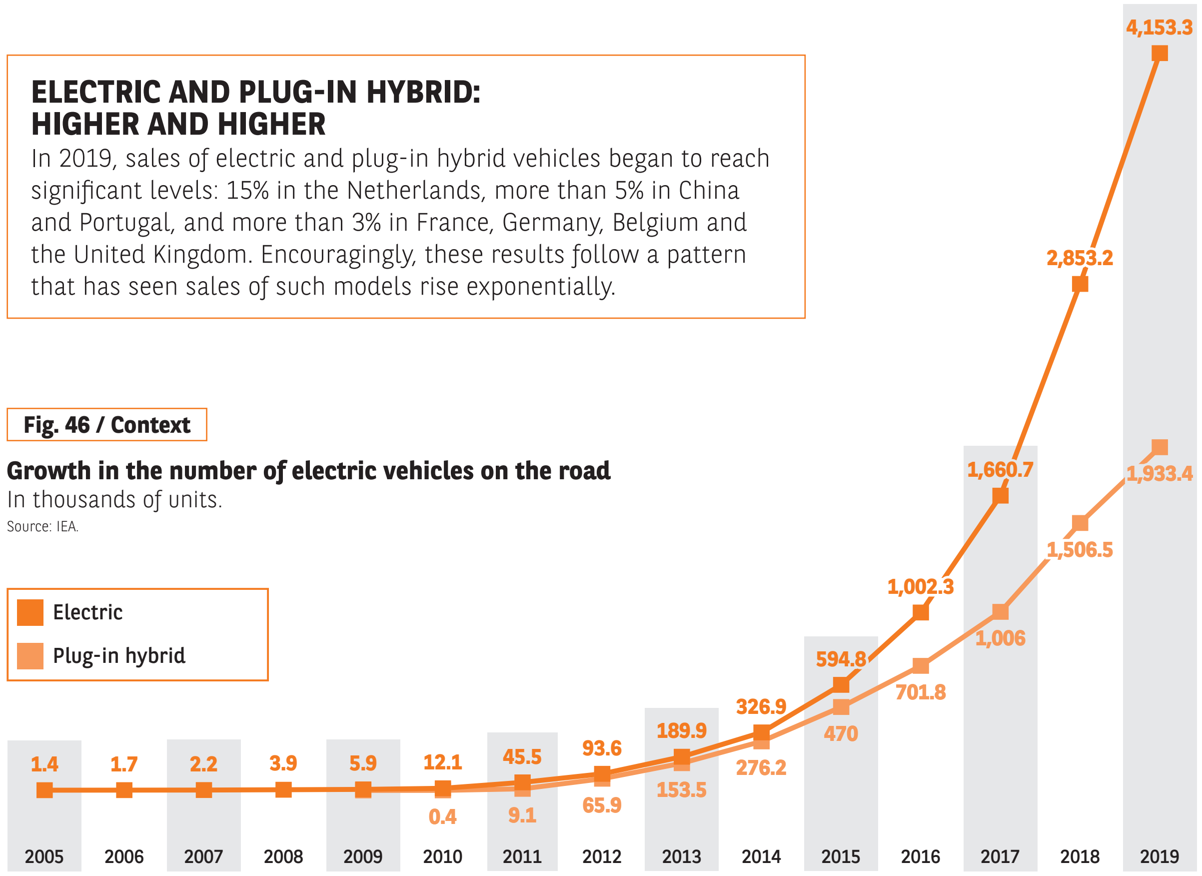


ELECTRIC AND PLUG-IN HYBRID: HIGHER AND HIGHER

In 2019, sales of electric and plug-in hybrid vehicles began to reach significant levels: 15% in the Netherlands, more than 5% in China and Portugal, and more than 3% in France, Germany, Belgium and the United Kingdom. Encouragingly, these results follow a pattern that has seen sales of such models rise exponentially.

Fig. 46 / Context

Growth in the number of electric vehicles on the road
In thousands of units.
Source: IEA.



ELECTRIC CARS: THE ANSWER TO ENVIRONMENTAL PROBLEMS

If we focus on fully-electric cars alone, the majority of people view them as an ideal solution with which to combat a wide range of environmental problems. The issues cited in particular are noise pollution, air pollution and climate change (82, 85%, 79%) **(Fig. 47)**.

CARBON FOOTPRINT: ELECTRICITY WINS OUT

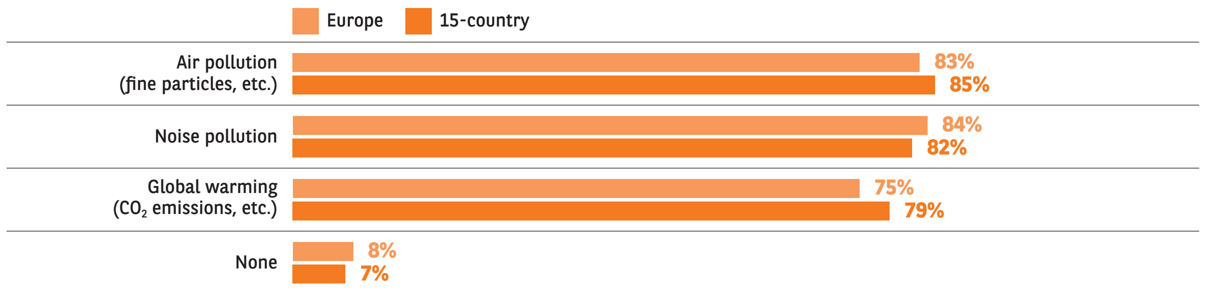
The debate around the carbon footprint of electric cars rumbles on, with critics pointing out, among other issues, that the treatment of battery waste and the depletion of the natural resources needed to manufacture cells are both problematic. Nonetheless, their environmental impact is still smaller than that of comparable diesel or petrol vehicles.

Fig. 47

Do you believe that electric cars could be a solution to the following problems?

Select one or more answers. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.



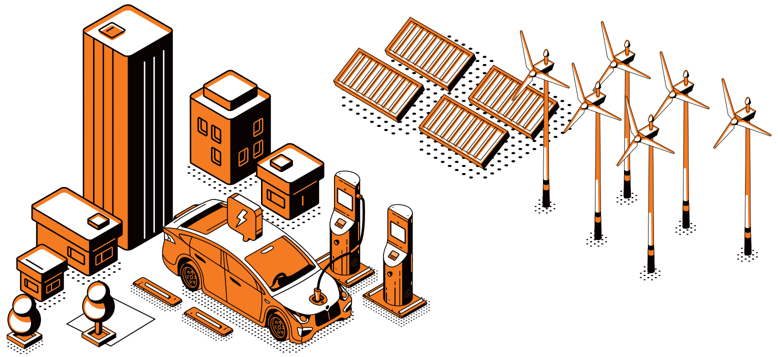
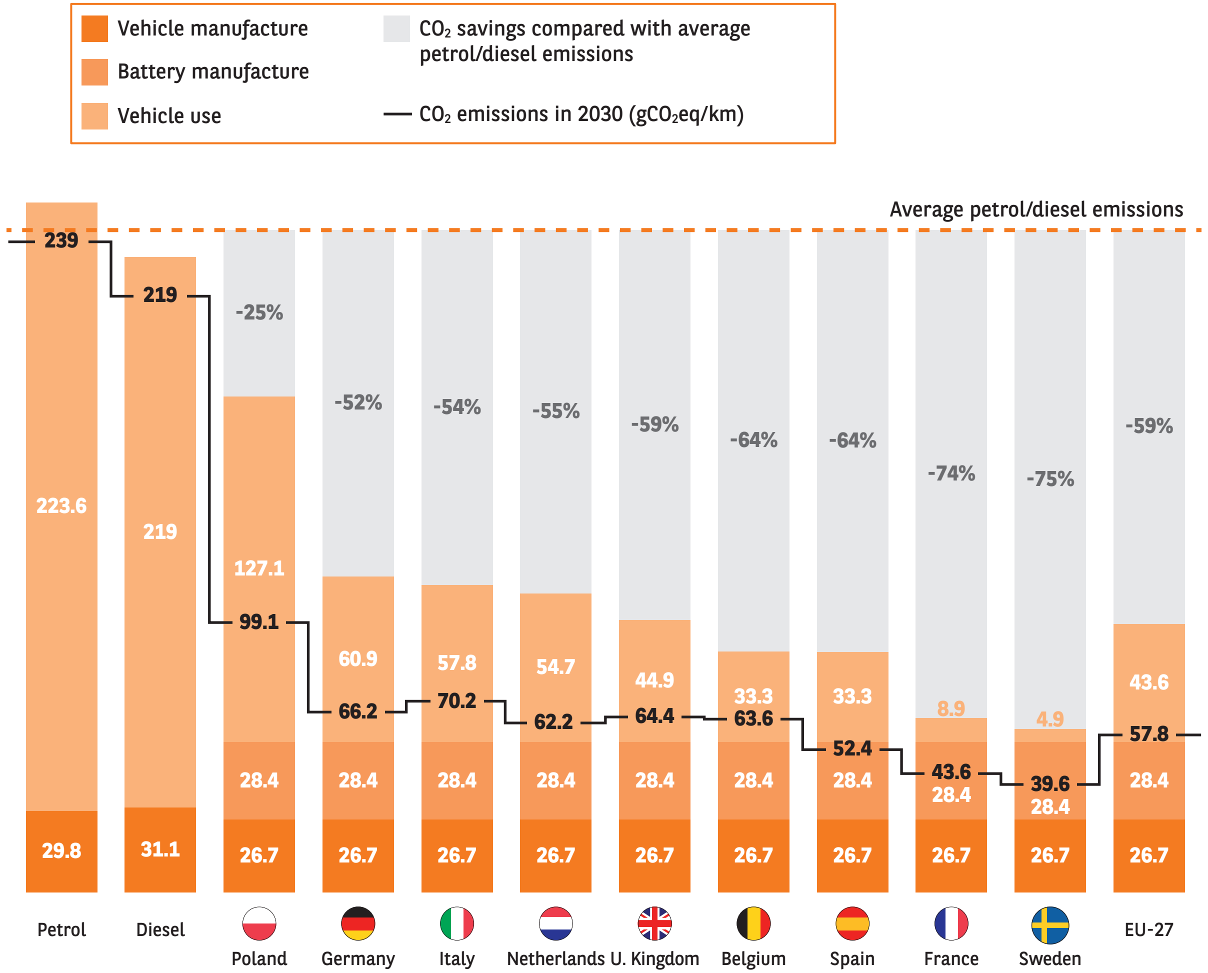


Fig. 48 / Context

Carbon footprint of electric vehicles in each European country

Calculation assumption: 225,000 km travelled by each vehicle.

Source: Transport & Environment (How Clean are Electric Cars tool).



AN EXPECTATION THAT GOVERNMENTS AND ENERGY INDUSTRIES WILL TAKE US TO THE NEXT LEVEL

As we have seen, people are looking to governments to support the automotive industry, but not at any price. The same goes for expanding the network of charging stations, which is currently an Achilles heel for the development of this technology, together with the cost and range of vehicles.
1 in 3 people believe it is up to the authorities to drive this growth **(Fig. 49)**. However, various other stakeholders are also expected to help pick up the reins. Almost the same proportion believe that companies from the energy sector must contribute. The rationale may be that these firms should start giving back what they have taken from the planet to help ensure a more sustainable future.

Those in more "economically liberal" countries, like the United States and Brazil, tend to expect less from governments in this area, although the UK swims against this tide. There is a broader consensus regarding the efforts expected from energy companies, with Brazil and South Africa leading these demands.

ELECTRIC: THE FUTURE OF MOTORING

A final leap forward was apparently needed for electric cars to be considered the auto industry's guiding light towards a bright future. Today, this leap has resolutely been made. 3 in 4 state that these vehicles will secure the sector's future **(Fig. 51)**. Electric power is largely viewed as the only magic wand available. On this question, which is fundamentally tied to government environmental policies, we find the same difference of opinion already observed in many areas. Indeed, while the emerging countries and China passionately believe in the idea, France, Germany and Belgium are a little less convinced.

Fig. 49

To make the use of electric cars more practical, would you say that the charging network should be developed primarily by...

Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.

Source: L'Observatoire Cetelem de l'Automobile.

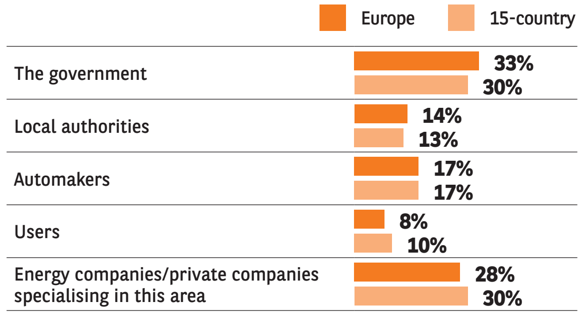


Fig. 50 / Context

Number of electric vehicles per public charging station in Europe in 2019

Rounded data.

Sources: Recharge EU: Transport & Environment (Analyses based on Plugsurfing, Openchargemap and EAFO).

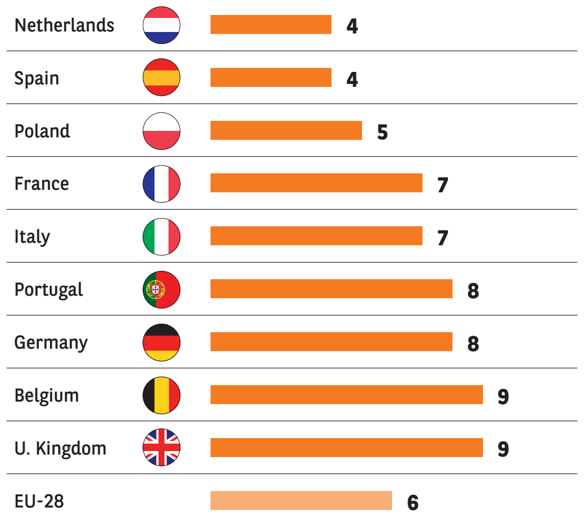
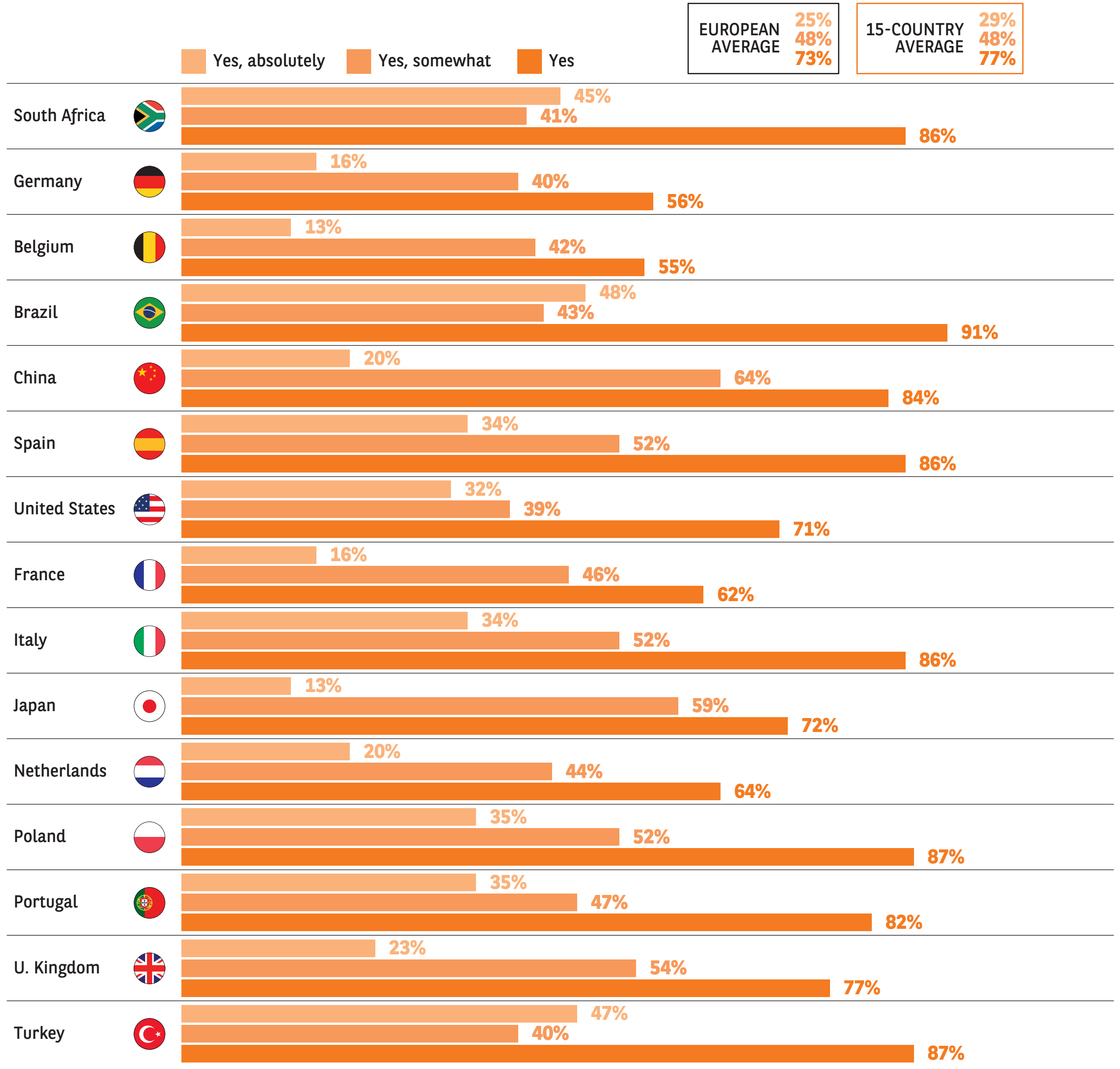


Fig. 51

Do you believe electric vehicles are a way of securing the future of the automotive industry?

Select one answer only. Proportion of "Yes" answers.

Source: L'Observatoire Cetelem de l'Automobile.



MANUFACTURERS ARE PLUGGING IN TO ELECTRICITY

People's faith in the ability of electric cars to save the automotive industry is also measured in terms of hard cash and the strategic commitment required from manufacturers across the globe. Countless new models are set to hit the market over the coming months and years. And given the levels of investment announced, this is surely just the beginning.

Fig. 52 / Context

Plans by automakers to invest in hybrid and electric

Sources: Zonebourse, Electrek, Slashgear / Les échos, Nikkei.com, CBNC, Bangkokpost, Agenceecofin, VW/emobilitaet

Group / Manufacturer	Investment location	Project	Estimated value
Volkswagen	World, primarily China	Investments in e-mobility until 2025 Around 70 pure electric vehicles planned by 2030 In 2025, the Volkswagen brand aims to sell more than one million electric vehicles per year worldwide	**€35bn**
Tesla	World	At Battery Day, the company announced its intention to increase its battery production capacity from 200 GWh to 3 TWh between 2023 and 2030 (x15) No figures have yet been announced, but by way of comparison the Tesla/Panasonic Giga Nevada plant built in 2014 cost an estimated $5 billion and produces batteries with a total capacity of 50 GWh/year Panasonic: continued joint investment with TESLA: $100m invested	**No figures announced**
General Motors	United States	Increase in local EV production Part of a $4.5 billion investment project in 3 American EV plants	**€2.2bn**
Ford	Canada	Investment in EV production facilities	**$1.35bn**
PSA / Fiat Chrysler	Canada	Investment in EV production facilities	**$1.1bn**
Hyundai	Singapour	Investment in EV production facilities	**$295m**

KEY FIGURES

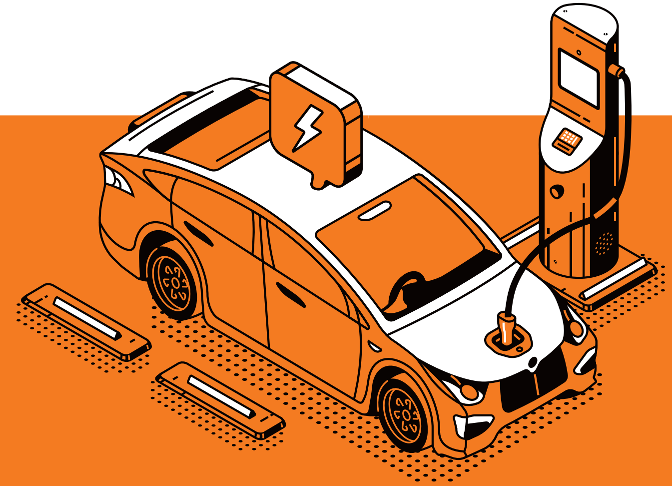
1 in 4 cars purchased will be second-hand.

More than **1 in 2 people** state that their next vehicle will be hybrid or electric.

3 in 4 people believe that electric cars are the future of the auto industry.

More than **8 out of 10 people** believe it is possible to make more space for sustainable modes of transport.

3 in 4 people state that they would prefer to buy a car manufactured or assembled in their country.



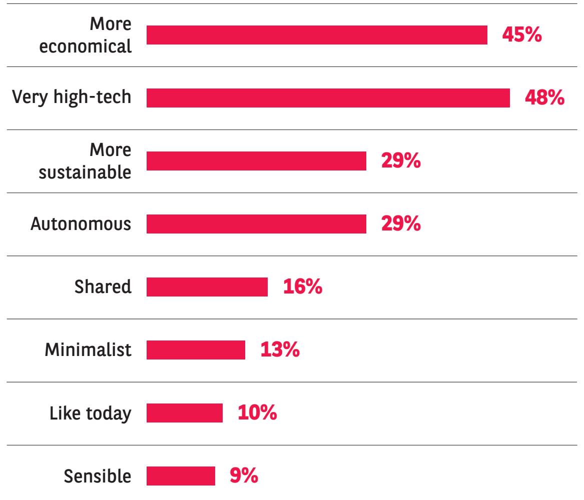
EPILOGUE

So, is a divorce impossible? Looking at the results of this 2021 edition of L'Observatoire Cetelem, everything points to this being the case. The final answer obtained from respondents suggests that the auto industry's resurgence will look nothing like its previous glories. The cars of the future must bear little resemblance to those of today if they are to find favour among consumers. What people dream of are ultra high-tech vehicles that will be more economical and more sustainable **(Fig. 53)**. And they will love them for it.

While cars continue to divide opinion, the sector also remains divided about its own future.
On the one hand, we are seeing a proliferation of new safety, communication and entertainment features, as well as increasingly sophisticated powertrain and pollution control technologies, which have led to cars becoming larger and heavier. Thus, SUVs and premium models have tended to account for a growing proportion of global sales.
On the other hand, as our findings suggest, used vehicles are proving more and more popular.
The low-cost market ceased to be a niche segment a long time ago. Lightweight motorised four-wheelers are becoming more common on our streets.
Debates that pit ecology against the economy often result in Manichean discussions around radically contrasting arguments.
But in real life, the issue is often less clear cut. Mobility, automobility and cars will continue to inhabit a more nuanced reality, even in a post-COVID-19 world.

Fig. 53

What do you imagine cars will be like in 5 to 10 years' time?
Select one answer only
Source: L'Observatoire Cetelem de l'Automobile.



COUNTRY FACT SHEETS

SOUTH AFRICA • GERMANY • BELGIUM • BRAZIL • CHINA • SPAIN• UNITED STATES • FRANCE
ITALY • JAPAN • NETHERLANDS • POLAND • PORTUGAL • UNITED KINGDOM • TURKEY

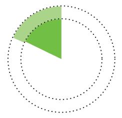
South Africa

South Africa | 15-country average

The prevalence of cars

2015 motorisation rate[1]

176 vehicles per 1,000 inhabitants *(World: 182)*



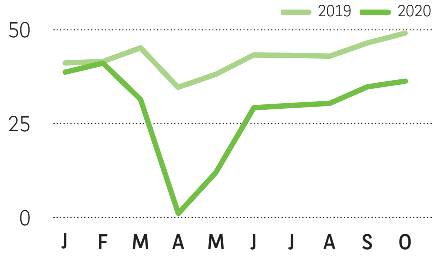
2019 Automotive Output[1] **0.6** million vehicles *(ranked 12th/15*)*

EV market share 0,1% | 2,5%

Proportion who like and love cars 69% | 52%

Purchasing intentions in the next 12 months **42%** vs. 62% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **0,53** | 2020 **0,36** *(-33%)* | 2021 **0,41** *(+15%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 77% | 72%

Agree with taxes on polluting vehicles: 52% | 61%

Support a reduction in the space set aside for cars in cities: 55% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 35% | 45%

Feel protected when they are in a car: 82% | 76%

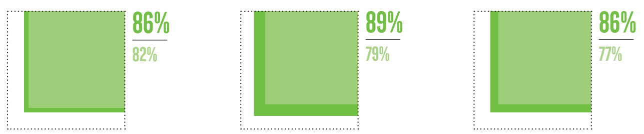
A national relationship

Favour the domestic automotive industry: 71% | 74%

Consider that the government does not support the automotive industry sufficiently: 76% | 61%

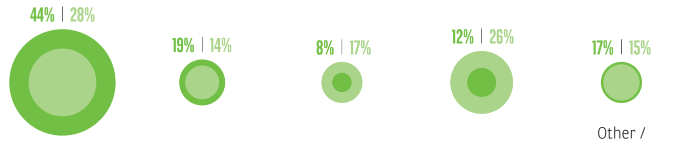
A green and virtuous future?

Proportion of respondents...



Wishing arrangements for soft modes to the detriment of the automobile | Seeing EV as a solution to global warming problems | Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased



SYNTHESIS

South Africa is a car market with great potential: a low motorisation rate, high-quality road infrastructures and a strong relationship with the automobile. The South Africans are also the most likely to view cars as valuable objects. Despite these qualities, the country was already facing economic difficulties before the health crisis, and it could take years to fulfil its potential.

** Countries of L'Observatoire Cetelem.*
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

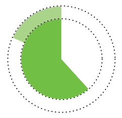
Germany

Germany | 15-country average

The prevalence of cars

2018 motorisation rate[1]

614 vehicles per 1,000 inhabitants *(World: 182)*



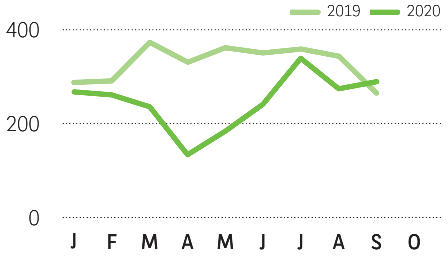
2019 Automotive Output[1] **4.6** millions de vehicles *(ranked 4th/15*)*

EV market share 3% | 2,5%

Proportion who like and love cars 43% | 52%

Purchasing intentions in the next 12 months **23%** vs. 34% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **4,01** | 2020 **3,13** *(-22%)* | 2021 **3,41** *(+9%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 55% | 72%

Agree with taxes on polluting vehicles: 62% | 61%

Support a reduction in the space set aside for cars in cities: 70% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 45% | 45%

Feel protected when they are in a car: 65% | 76%

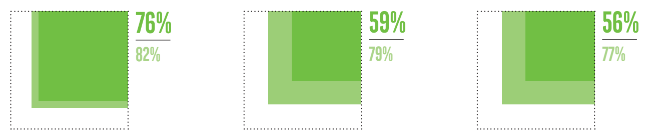
A national relationship

Favour the domestic automotive industry: 78% | 74%

Consider that the government does not support the automotive industry sufficiently: 49% | 61%

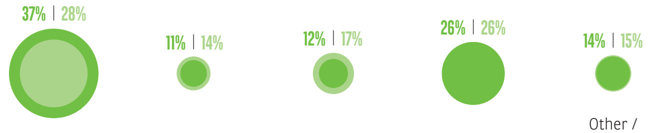
A green and virtuous future?

Proportion of respondents...



Wishing arrangements for soft modes to the detriment of the automobile | Seeing EV as a solution to global warming problems | Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased



SYNTHESIS

Germany's motoring tradition is reflected in the answers of its citizens: fewer Germans believe the criticisms directed at cars to be justified and they are less likely to consider electric vehicles to be a way of securing the future of the automotive sector. However, the Germans would also like to see the presence of cars in cities reduced and sustainable transport solutions developed instead.

** Countries of L'Observatoire Cetelem.*
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

Belgium

■ Belgium ■ 15-country average

The prevalence of cars

2018 motorisation rate[1]

589 vehicles per 1,000 inhabitants *(World: 182)*

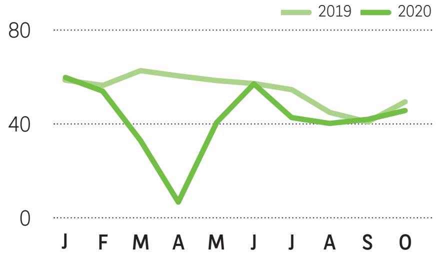
2019 Automotive Output[1] **0,3** million vehicles *(ranked 14th/15*)*

EV market share 3,3% | 2,5%

Proportion who like and love cars 46% | 52%

Purchasing intentions in the next 12 months **15%** vs. 24% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **0,64** | 2020 **0,49** *(-23%)* | 2021 **0,55** *(+10%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 63% | 72%

Agree with taxes on polluting vehicles: 61% | 61%

Support a reduction in the space set aside for cars in cities: 53% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 33% | 45%

Feel protected when they are in a car: 64% | 76%

A national relationship

Favour the domestic automotive industry: 33% | 74%

Consider that the government does not support the automotive industry sufficiently: 58% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 68% | 82%

Seeing EV as a solution to global warming problems: 61% | 79%

Seeing EV as a way to secure the future of the automotive industry: 55% | 77%

Energy source of the next vehicle purchased

Petrol	Diesel	Electric	Hybrid	Other / Not sure yet
26% | 28%	19% | 14%	15% | 17%	23% | 26%	17% | 15%

SYNTHESIS

Belgium is one of the European countries in which electric vehicles are making real inroads, with a significant market share and strong purchasing intentions. Paradoxically, the Belgians are among those who are the least likely to consider electric vehicles as a solution to environmental problems, while also being less inclined than citizens of other countries to support the development of sustainable modes of travel to the detriment of cars.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

Brazil

■ Brazil ■ 15-country average

The prevalence of cars

2015 motorisation rate[1]

206 vehicles per 1,000 inhabitants *(World: 182)*

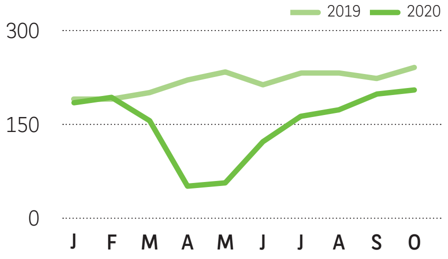
2019 Automotive Output[1] **2,9** millions de vehicles *(ranked 5th/15*)*

EV market share 0,1% | 2,5%

Proportion who like and love cars 80% | 52%

Purchasing intentions in the next 12 months **51%** vs. 68% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **2,79** | 2020 **1,92** *(-31%)* | 2021 **2,31** *(+20%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 87% | 72%

Agree with taxes on polluting vehicles: 54% | 61%

Support a reduction in the space set aside for cars in cities: 52% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 54% | 45%

Feel protected when they are in a car: 78% | 76%

A national relationship

Favour the domestic automotive industry: 80% | 74%

Consider that the government does not support the automotive industry sufficiently: 81% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 96% | 82%

Seeing EV as a solution to global warming problems: 94% | 79%

Seeing EV as a way to secure the future of the automotive industry: 91% | 77%

Energy source of the next vehicle purchased

Petrol	Diesel	Electric	Hybrid	Other / Not sure yet
33% | 28%	7% | 14%	8% | 17%	29% | 26%	23% | 15%

SYNTHESIS

Brazil has the highest proportion of respondents who like or love cars. However, the Brazilians are also the most likely to believe that criticisms of cars are justified. They see electric cars as a solution to environmental problems, but that is not yet translating into sales. On top of the global health crisis, Brazil is going through an economic and political crisis, which explains why intentions to buy a vehicle dropped between 2019 and 2020.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

China

China | 15-country average

The prevalence of cars

2015 motorisation rate[1]

118 vehicles per 1,000 inhabitants *(World: 182)*

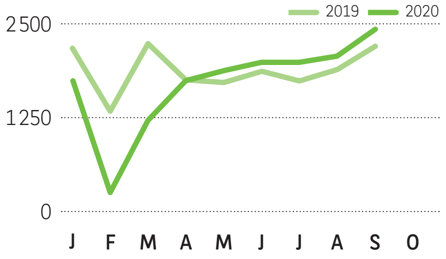
2019 Automotive Output[1] 25,7 millions de vehicles *(ranked 1st/15*)*

EV market share 4,9% | 2,5%

Proportion who like and love cars 49% | 52%

Purchasing intentions in the next 12 months 43% vs. 43% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 25,8 | 2020 23,4 *(-9%)* | 2021 25,8 *(+10%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 80% | 72%

Agree with taxes on polluting vehicles: 79% | 61%

Support a reduction in the space set aside for cars in cities: 54% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 45% | 45%

Feel protected when they are in a car: 91% | 76%

A national relationship

Favour the domestic automotive industry: 75% | 74%

Consider that the government does not support the automotive industry sufficiently: 59% | 61%

A green and virtuous future?

Proportion of respondents...

92% | 82% Wishing arrangements for soft modes to the detriment of the automobile

81% | 79% Seeing EV as a solution to global warming problems

84% | 77% Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased

Petrol 36% | 28%

Diesel 0% | 14%

Electric 28% | 17%

Hybrid 31% | 26%

Other / Not sure yet 5% | 15%

SYNTHESIS

China has taken on the role of champion of the auto industry. The Chinese market has been less severely affected by Covid-19 and is expected to make up the deficit by 2021, with purchasing intentions in 2021 comparable to last year. The intentions of the Chinese when it comes to cars are unambiguous: they want polluting vehicles to be taxed more and see the future of motoring as electric.

* Countries of L'Observatoire Cetelem.
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

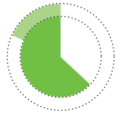
Spain

Spain | 15-country average

The prevalence of cars

2018 motorisation rate[1]

629 vehicles per 1,000 inhabitants *(World: 182)*



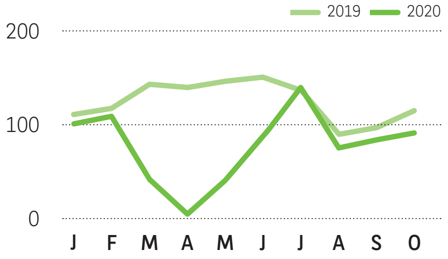
2019 Automotive Output[1] 2,8 millions de vehicles *(ranked 6th/15*)*

EV market share 1,4% | 2,5%

Proportion who like and love cars 61% | 52%

Purchasing intentions in the next 12 months 33% vs. 46% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 1,50 | 2020 0,96 *(-36%)* | 2021 1,12 *(+16%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 82% | 72%

Agree with taxes on polluting vehicles: 58% | 61%

Support a reduction in the space set aside for cars in cities: 72% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 47% | 45%

Feel protected when they are in a car: 73% | 76%

A national relationship

Favour the domestic automotive industry: 86% | 74%

Consider that the government does not support the automotive industry sufficiently: 78% | 61%

A green and virtuous future?

Proportion of respondents...

87% | 82% Wishing arrangements for soft modes to the detriment of the automobile

90% | 79% Seeing EV as a solution to global warming problems

86% | 77% Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased

Petrol 9% | 28%

Diesel 15% | 14%

Electric 17% | 17%

Hybrid 42% | 26%

Other / Not sure yet 17% | 15%

SYNTHESIS

Spain's car market was the most severely impacted by Covid-19 in 2020. This is a country whose automotive industry is highly developed and whose citizens are more passionate about cars than the overall average. Yet, the Spanish believe that the criticisms levelled at cars are justified and are in favour of reducing their presence in cities, much like their Portuguese neighbours.

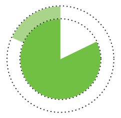
* Countries of L'Observatoire Cetelem.
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

United States

United States | 15-country average

The prevalence of cars

2015 motorisation rate[1]



821 vehicles per 1,000 inhabitants *(World: 182)*

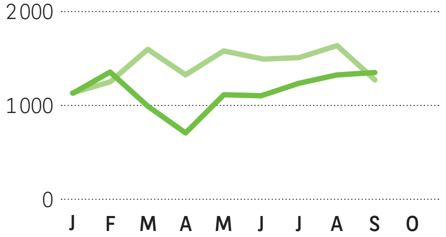
2019 Automotive Output[1] 10,9 millions de vehicles *(ranked 2nd/15*)*

EV market share 2,1% | 2,5%

Proportion who like and love cars 61% | 52%

Purchasing intentions in the next 12 months 37% vs. 48% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 17,5 | 2020 14,3 *(-18%)* | 2021 15,6 *(+9%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 68% | 72%

Agree with taxes on polluting vehicles: 50% | 61%

Support a reduction in the space set aside for cars in cities: 58% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 42% | 45%

Feel protected when they are in a car: 79% | 76%

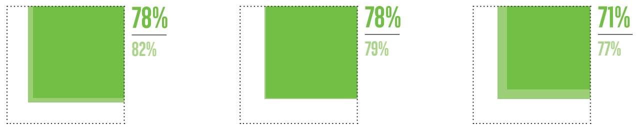
A national relationship

Favour the domestic automotive industry: 81% | 74%

Consider that the government does not support the automotive industry sufficiently: 45% | 61%

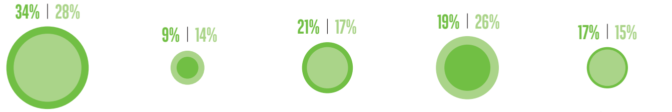
A green and virtuous future?

Proportion of respondents...



Wishing arrangements for soft modes to the detriment of the automobile | Seeing EV as a solution to global warming problems | Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased



SYNTHESIS

The United States will still be the land of the automobile in 2021: the impact of the health crisis on purchasing intentions has been relatively moderate and Americans will continue to prioritise their industry in 2021. Away from the clichés, the majority of Americans want to reduce the presence of cars in cities, while the proportion of respondents who are prepared to live without a car is in line with the global average.

** Countries of L'Observatoire Cetelem.*
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

France

France | 15-country average

The prevalence of cars

2018 motorisation rate[1]

596 vehicles per 1,000 inhabitants *(World: 182)*

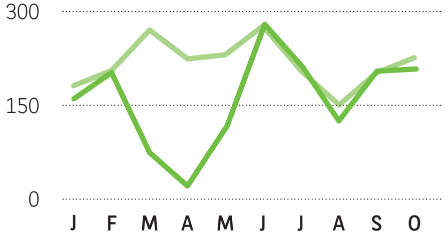
2019 Automotive Output[1] 2,2 millions de vehicles *(ranked 7th/15*)*

EV market share 2,8% | 2,5%

Proportion who like and love cars 50% | 52%

Purchasing intentions in the next 12 months 26% vs. 36% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 2,76 | 2020 2,00 *(-27%)* | 2021 2,30 *(+15%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 60% | 72%

Agree with taxes on polluting vehicles: 64% | 61%

Support a reduction in the space set aside for cars in cities: 63% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 35% | 45%

Feel protected when they are in a car: 79% | 76%

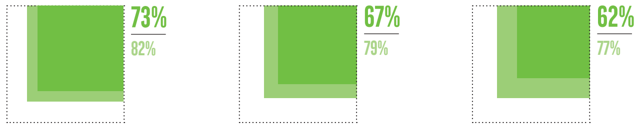
A national relationship

Favour the domestic automotive industry: 67% | 74%

Consider that the government does not support the automotive industry sufficiently: 50% | 61%

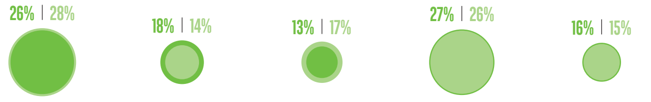
A green and virtuous future?

Proportion of respondents...



Wishing arrangements for soft modes to the detriment of the automobile | Seeing EV as a solution to global warming problems | Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased



SYNTHESIS

In France, the status afforded to cars is declining sharply, even though many are not yet willing to live without their vehicle. They are less likely than other respondents to feel that the criticisms aimed at cars are justified. Despite the high penetration rate of French brands in the European electric vehicle market, purchasing intentions for such vehicles remain below the global average.

** Countries of L'Observatoire Cetelem.*
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

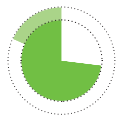
Italy

Italy | 15-country average

The prevalence of cars

2018 motorisation rate[1]

730 vehicles per 1,000 inhabitants *(World: 182)*



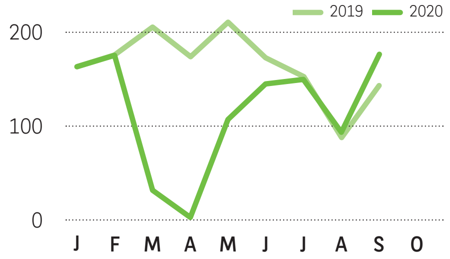
2019 Automotive Output[1] 0,9 million vehicles *(ranked 10th/15*)*

EV market share 0,9% | 2,5%

Proportion who like and love cars 48% | 52%

Purchasing intentions in the next 12 months 46% vs. 54% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 2,13 | 2020 1,42 *(-33%)* | 2021 1,68 *(+18%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 79% | 72%

Agree with taxes on polluting vehicles: 66% | 61%

Support a reduction in the space set aside for cars in cities: 78% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 40% | 45%

Feel protected when they are in a car: 72% | 76%

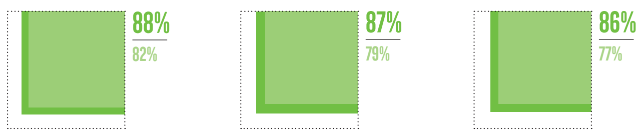
A national relationship

Favour the domestic automotive industry: 77% | 74%

Consider that the government does not support the automotive industry sufficiently: 58% | 61%

A green and virtuous future?

Proportion of respondents...

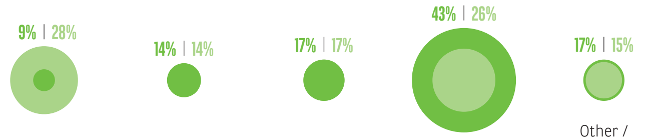


Wishing arrangements for soft modes to the detriment of the automobile: 88% | 82%

Seeing EV as a solution to global warming problems: 87% | 79%

Seeing EV as a way to secure the future of the automotive industry: 86% | 77%

Energy source of the next vehicle purchased



Petrol: 9% | 28%

Diesel: 14% | 14%

Electric: 17% | 17%

Hybrid: 43% | 26%

Other / Not sure yet: 17% | 15%

SYNTHESIS

While Italy is one of the countries where motoring is viewed as a pleasure and where the motorisation rate is among the highest, the Italians are relatively dispassionate about motoring. They tend to be in favour of reducing the presence of cars in cities and understand the criticisms levelled at this mode of transport. However, the country is slightly behind its European neighbours when it comes to the proportion of electric vehicles on its roads.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

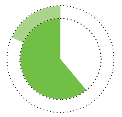
Japan

Japan | 15-country average

The prevalence of cars

2015 motorisation rate[1]

609 vehicles per 1,000 inhabitants *(World: 182)*



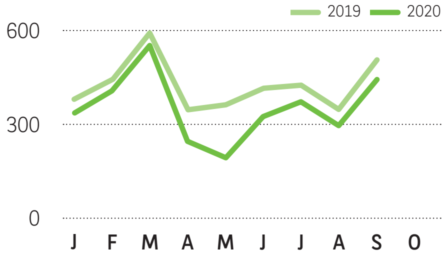
2019 Automotive Output[1] 9,7 millions de vehicles *(ranked 3rd/15*)*

EV market share 0,9% | 2,5%

Proportion who like and love cars 33% | 52%

Purchasing intentions in the next 12 months 18% vs. 26% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 5,20 | 2020 4,36 *(-16%)* | 2021 4,71 *(+8%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 70% | 72%

Agree with taxes on polluting vehicles: 60% | 61%

Support a reduction in the space set aside for cars in cities: 60% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 34% | 45%

Feel protected when they are in a car: 79% | 76%

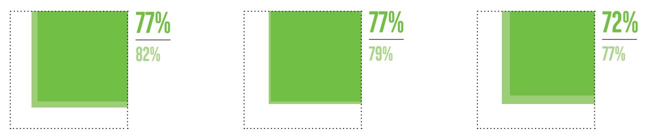
A national relationship

Favour the domestic automotive industry: 85% | 74%

Consider that the government does not support the automotive industry sufficiently: 34% | 61%

A green and virtuous future?

Proportion of respondents...

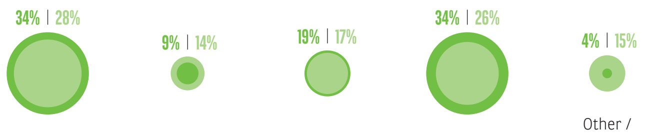


Wishing arrangements for soft modes to the detriment of the automobile: 77% | 82%

Seeing EV as a solution to global warming problems: 77% | 79%

Seeing EV as a way to secure the future of the automotive industry: 72% | 77%

Energy source of the next vehicle purchased



Petrol: 34% | 28%

Diesel: 9% | 14%

Electric: 19% | 17%

Hybrid: 34% | 26%

Other / Not sure yet: 4% | 15%

SYNTHESIS

While they are fairly reluctant to relinquish their cars, the Japanese do not see them as objects of desire but as utilitarian items. The country's automotive industry is highly developed and well supported by its inhabitants. Purchasing intentions for electric and hybrid vehicles are significantly higher than in other countries.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

Netherlands

Netherlands | 15-country average

The prevalence of cars

2018 motorisation rate[1]

580 vehicles per 1,000 inhabitants *(World: 182)*

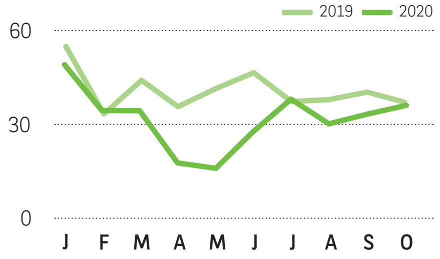
2019 Automotive Output[1] **0,3** million vehicles *(ranked 15th/15*)*

EV market share 15% | 2,5%

Proportion who like and love cars 42% | 52%

Purchasing intentions in the next 12 months **18%** vs. 31% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **0,53** | 2020 **0,41** *(-23%)* | 2021 **0,46** *(+10%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 66% | 72%

Agree with taxes on polluting vehicles: 59% | 61%

Support a reduction in the space set aside for cars in cities: 60% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 45% | 45%

Feel protected when they are in a car: 59% | 76%

A national relationship

Favour the domestic automotive industry: 48% | 74%

Consider that the government does not support the automotive industry sufficiently: 56% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 71% | 82%

Seeing EV as a solution to global warming problems: 66% | 79%

Seeing EV as a way to secure the future of the automotive industry: 64% | 77%

Energy source of the next vehicle purchased

Petrol: 43% | 28%

Diesel: 13% | 14%

Electric: 23% | 17%

Hybrid: 14% | 26%

Other / Not sure yet: 7% | 15%

SYNTHESIS

The land of bicycles already places a strong emphasis on sustainable modes of travel. Thus, the Dutch are less inclined to further reduce the presence of cars so as to develop these alternative forms of transport. The market share of electric vehicles is higher in the country than in any of the others surveyed, but purchasing intentions for electric vehicles are no higher there than elsewhere. The Netherlands can point to the fact that it has one of the most developed charging networks in the world: it is home to 25% of Europe's charging points.

* *Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

Poland

Poland | 15-country average

The prevalence of cars

2018 motorisation rate[1]

719 vehicles per 1,000 inhabitants *(World: 182)*

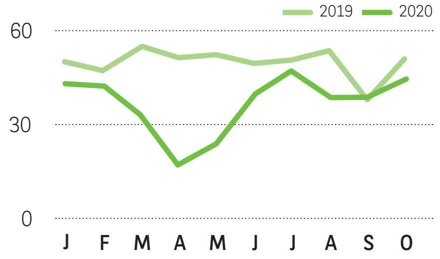
2019 Automotive Output[1] **0.6** million vehicles *(ranked 11th/15*)*

EV market share 0.5% | 2,5%

Proportion who like and love cars 49% | 52%

Purchasing intentions in the next 12 months **31%** vs. 44% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 **0,66** | 2020 **0,49** *(-25%)* | 2021 **0,56** *(+15%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 67% | 72%

Agree with taxes on polluting vehicles: 58% | 61%

Support a reduction in the space set aside for cars in cities: 70% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 60% | 45%

Feel protected when they are in a car: 86% | 76%

A national relationship

Favour the domestic automotive industry: 57% | 74%

Consider that the government does not support the automotive industry sufficiently: 73% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 80% | 82%

Seeing EV as a solution to global warming problems: 83% | 79%

Seeing EV as a way to secure the future of the automotive industry: 87% | 77%

Energy source of the next vehicle purchased

Petrol: 34% | 28%

Diesel: 15% | 14%

Electric: 9% | 17%

Hybrid: 29% | 26%

Other / Not sure yet: 13% | 15%

SYNTHESIS

Although the majority of Poles claim that they are prepared to live without a car, Poland still has one of the highest rates of car ownership in the world, bolstered by a vibrant second-hand market. Poland lags behind the rest of Europe in the development of electric vehicles, both in terms of market share and purchasing intentions.

* *Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

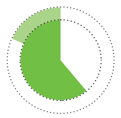
Portugal

Portugal | 15-country average

The prevalence of cars

2018 motorisation rate[1]

610 vehicles per 1,000 inhabitants *(World: 182)*



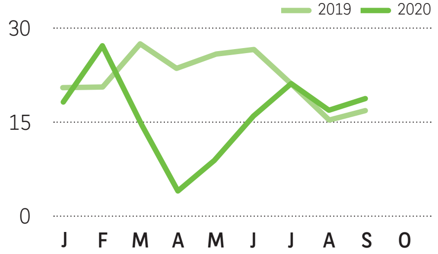
2019 Automotive Output[1] 0,3 million vehicles *(ranked 13th/15*)*

EV market share 5,7% | 2,5%

Proportion who like and love cars 43% | 52%

Purchasing intentions in the next 12 months 23% vs. 35% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 0,27 | 2020 0,18 *(-32%)* | 2021 0,22 *(+18%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 83% | 72%

Agree with taxes on polluting vehicles: 65% | 61%

Support a reduction in the space set aside for cars in cities: 78% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 41% | 45%

Feel protected when they are in a car: 75% | 76%

A national relationship

Favour the domestic automotive industry: 68% | 74%

Consider that the government does not support the automotive industry sufficiently: 73% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 92% | 82%

Seeing EV as a solution to global warming problems: 88% | 79%

Seeing EV as a way to secure the future of the automotive industry: 82% | 77%

Energy source of the next vehicle purchased

Petrol	Diesel	Electric	Hybrid	Other / Not sure yet
16% | 28%	15% | 14%	24% | 17%	18% | 26%	27% | 15%

SYNTHESIS

Portugal is a country in which cars play an important role, as demonstrated by its high motorisation rate. The Portuguese feel that their car raises their status, more so than in any other country. Yet, a majority of respondents would like sustainable forms of transport to be developed to the detriment of cars, because they consider that the latter take up too much space in their towns and cities.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

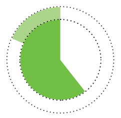
United Kingdom

United Kingdom | 15-country average

The prevalence of cars

2018 motorisation rate[1]

603 vehicles per 1,000 inhabitants *(World: 182)*



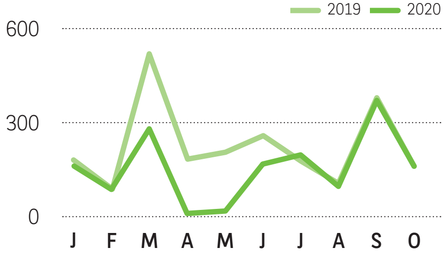
2019 Automotive Output[1] 1,4 million vehicles *(ranked 9th/15*)*

EV market share 3,2% | 2,5%

Proportion who like and love cars 48% | 52%

Purchasing intentions in the next 12 months 27% vs. 35% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 2,68 | 2020 1,87 *(-30%)* | 2021 2,08 *(+11%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified: 69% | 72%

Agree with taxes on polluting vehicles: 64% | 61%

Support a reduction in the space set aside for cars in cities: 68% | 64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car: 51% | 45%

Feel protected when they are in a car: 75% | 76%

A national relationship

Favour the domestic automotive industry: 70% | 74%

Consider that the government does not support the automotive industry sufficiently: 56% | 61%

A green and virtuous future?

Proportion of respondents...

Wishing arrangements for soft modes to the detriment of the automobile: 80% | 82%

Seeing EV as a solution to global warming problems: 78% | 79%

Seeing EV as a way to secure the future of the automotive industry: 77% | 77%

Energy source of the next vehicle purchased

Petrol	Diesel	Electric	Hybrid	Other / Not sure yet
28% | 28%	15% | 14%	27% | 17%	19% | 26%	11% | 15%

SYNTHESIS

The Brits are keen to support their automotive industry, as highlighted by purchasing intentions that have not been particularly impacted by the health crisis. The development of electric vehicles has been extremely rapid in the United Kingdom. Compared to its neighbours, the number of electric cars on its roads is growing faster than its charging network. This trend should continue into 2021, with close to 50% of purchasing intentions involving electric or hybrid vehicles.

** Countries of L'Observatoire Cetelem.*

Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

Turkey

Turkey | 15-country average

The prevalence of cars

2015 motorisation rate[1]

195 vehicles per 1,000 inhabitants *(World: 182)*

2019 Automotive Output[1]

1.5 million vehicles *(ranked 8th/15*)*

EV market share

N/A
2,5%

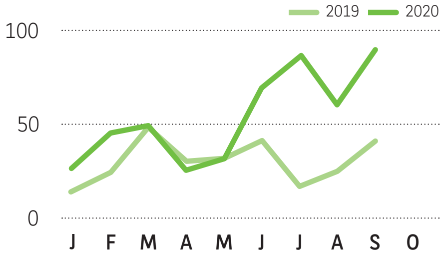
Proportion who like and love cars

65%
52%

Purchasing intentions in the next 12 months

50% vs. 57% the previous year

Monthly variation in new passenger vehicle sales[3]
(In thousands of vehicles)



Market forecast[3] *(In millions of NPV)*

2019 0,49 | 2020 0,69 *(+40%)* | 2021 0,76 *(+10%)*

Cars: an impossible divorce?

Proportion of respondents thinking this divorce...

POSSIBLE

Believe that criticisms of cars are justified
80%
72%

Agree with taxes on polluting vehicles
68%
61%

Support a reduction in the space set aside for cars in cities
73%
64%

IMPOSSIBLE

A personal relationship

Prepared to live without a car
67%
45%

Feel protected when they are in a car
87%
76%

A national relationship

Favour the domestic automotive industry
88%
74%

Consider that the government does not support the automotive industry sufficiently
60%
61%

A green and virtuous future?

Proportion of respondents...

87%
82%
Wishing arrangements for soft modes to the detriment of the automobile

89%
79%
Seeing EV as a solution to global warming problems

87%
77%
Seeing EV as a way to secure the future of the automotive industry

Energy source of the next vehicle purchased

21% | 28%
Petrol

28% | 14%
Diesel

24% | 17%
Electric

15% | 26%
Hybrid

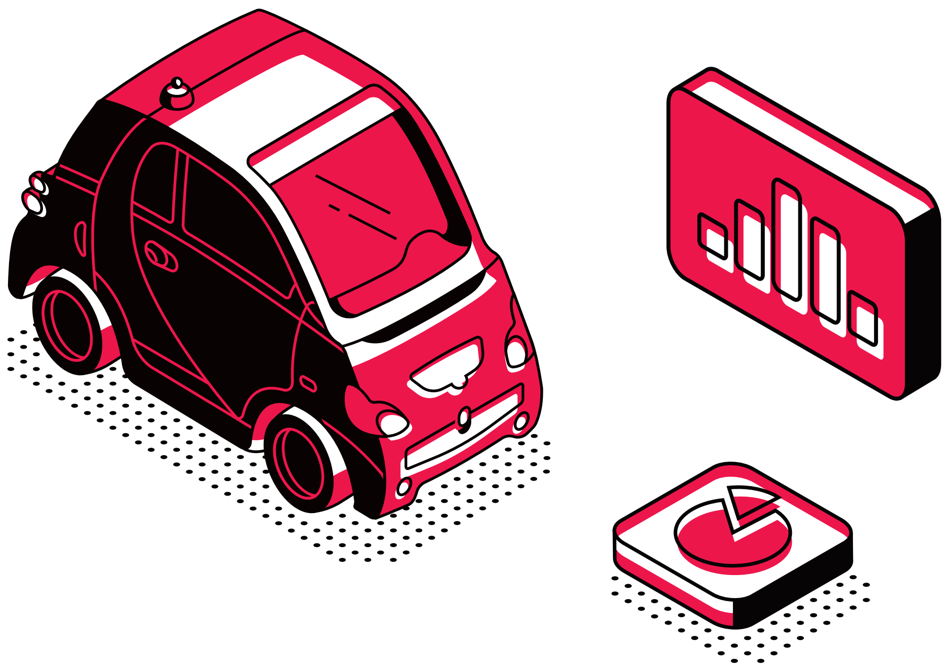
12% | 15%
Other / Not sure yet

SYNTHESIS

Turkey stands apart this year: it is the only country in the world to have seen significant growth in the sector in 2020, having made up ground lost during the 2019 economic crisis, when the market collapsed. While the motorisation rate remains low in Turkey and its auto industry is still developing, its inhabitants already believe that cars have too much of a presence and would like to see this reduced.

* *Countries of L'Observatoire Cetelem.*
Sources: [1] OICA. [2] ACEA (European Countries) / IEA (Others Countries). [3] OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.

ANNEX



Do you plan to buy a car in the next 12 months?
Select one answer only.

	Yes	No	Not sure yet
South Africa	42%	32%	26%
Germany	23%	54%	23%
Belgium	15%	62%	23%
Brazil	51%	25%	24%
China	43%	43%	14%
Spain	33%	37%	30%
United States	37%	43%	20%
France	26%	46%	28%
Italy	46%	28%	26%
Japan	18%	62%	20%
Netherlands	18%	51%	31%
Poland	31%	31%	38%
Portugal	23%	43%	34%
United Kingdom	27%	51%	22%
Turkey	50%	30%	20%
European average	**27%**	**45%**	**28%**
15-country average	**32%**	**43%**	**25%**

Has your intention to buy a car been prompted by the COVID-19 crisis?
Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.

	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	18%	17%	41%	24%
Germany	19%	15%	27%	39%
Belgium	5%	9%	24%	62%
Brazil	23%	24%	26%	27%
China	16%	45%	29%	10%
Spain	14%	33%	30%	23%
United States	35%	23%	20%	22%
France	17%	20%	20%	43%
Italy	12%	23%	28%	37%
Japan	23%	22%	18%	37%
Netherlands	10%	28%	31%	31%
Poland	19%	21%	34%	26%
Portugal	8%	12%	42%	38%
United Kingdom	34%	21%	28%	17%
Turkey	35%	20%	36%	9%
European average	**16%**	**21%**	**29%**	**34%**
15-country average	**21%**	**23%**	**29%**	**27%**

Do you think that the health crisis and its economic consequences will have an impact on how much you spend on your next car?
Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.

	Yes, I will spend more	Yes, I will spend less	No, it will have no impact
South Africa	43%	42%	15%
Germany	28%	28%	44%
Belgium	21%	27%	52%
Brazil	40%	38%	22%
China	32%	36%	32%
Spain	16%	43%	41%
United States	46%	27%	27%
France	24%	32%	44%
Italy	19%	47%	34%
Japan	37%	13%	50%
Netherlands	30%	34%	36%
Poland	26%	40%	34%
Portugal	29%	40%	31%
United Kingdom	39%	33%	28%
Turkey	62%	30%	8%
European average	**25%**	**38%**	**37%**
15-country average	**35%**	**35%**	**30%**

Do you believe that government efforts to support the automotive industry and trade are…
Select one answer only.

	Excessive	Insufficient	Just right
South Africa	10%	76%	14%
Germany	28%	49%	23%
Belgium	15%	58%	27%
Brazil	8%	81%	11%
China	9%	59%	32%
Spain	9%	78%	13%
United States	19%	45%	36%
France	21%	50%	29%
Italy	12%	58%	30%
Japan	26%	34%	40%
Netherlands	12%	56%	32%
Poland	11%	73%	16%
Portugal	7%	73%	20%
United Kingdom	11%	56%	33%
Turkey	29%	60%	11%
European average	**14%**	**61%**	**25%**
15-country average	**15%**	**61%**	**24%**

To your knowledge, has your government launched a plan to support the automotive industry?
Select one answer only.

	Yes	No	You don't know
South Africa	11%	52%	37%
Germany	24%	29%	47%
Belgium	10%	36%	54%
Brazil	15%	38%	47%
China	53%	13%	34%
Spain	34%	17%	49%
United States	20%	34%	46%
France	50%	16%	34%
Italy	55%	12%	33%
Japan	17%	28%	55%
Netherlands	21%	25%	54%
Poland	17%	36%	47%
Portugal	33%	16%	51%
United Kingdom	18%	33%	49%
Turkey	41%	29%	30%
European average	**29%**	**24%**	**47%**
15-country average	**28%**	**28%**	**44%**

Would you say that the criticisms levelled at cars are justified?
Select one answer only.

	Completely justified	Somewhat justified	Somewhat unjustified	Completely unjustified
South Africa	17%	60%	17%	6%
Germany	16%	39%	33%	12%
Belgium	13%	50%	29%	8%
Brazil	26%	61%	11%	2%
China	7%	73%	19%	1%
Spain	26%	56%	14%	4%
United States	21%	47%	22%	10%
France	14%	46%	30%	10%
Italy	19%	60%	17%	4%
Japan	10%	60%	25%	5%
Netherlands	11%	55%	26%	8%
Poland	18%	49%	29%	4%
Portugal	19%	64%	14%	3%
United Kingdom	20%	49%	24%	7%
Turkey	28%	52%	15%	5%
European average	**17%**	**52%**	**24%**	**7%**
15-country average	**17%**	**55%**	**22%**	**6%**

Do you believe that the automotive industry receives more or less criticism for its environmental impact than other sectors (agriculture, construction, energy, textiles, etc.)?
Select one answer only.

	More criticism	Less criticism	Neither more nor less criticism
South Africa	29%	31%	40%
Germany	44%	19%	37%
Belgium	55%	14%	31%
Brazil	39%	23%	38%
China	26%	25%	49%
Spain	63%	13%	24%
United States	39%	17%	44%
France	52%	12%	36%
Italy	59%	16%	25%
Japan	30%	20%	50%
Netherlands	37%	26%	37%
Poland	47%	20%	33%
Portugal	53%	13%	34%
United Kingdom	47%	16%	37%
Turkey	44%	29%	27%
European average	**51%**	**16%**	**33%**
15-country average	**44%**	**20%**	**36%**

Do you believe that the least environmentally friendly vehicles (4x4s, SUVs, large saloons, sports cars, etc.) should be subject to the following restrictions?
Select one answer per statement. Recap of respondents who answered “Yes, absolutely” and “Yes, somewhat”. The other possible answers were “No, not really” and “No, not at all”.

	CO_2 emissions limits	Power limits	Higher tax	Limits on the numbers of vehicles produced	Bans on their use in cities	No part exchange available when they are purchased	Bans on advertising	None
South Africa	74%	54%	52%	53%	44%	42%	27%	13%
Germany	77%	61%	62%	54%	59%	42%	44%	12%
Belgium	79%	60%	61%	53%	48%	42%	42%	13%
Brazil	87%	59%	54%	62%	49%	54%	42%	7%
China	88%	76%	79%	77%	63%	61%	60%	2%
Spain	85%	68%	58%	62%	63%	43%	41%	9%
United States	67%	53%	50%	52%	48%	45%	41%	23%
France	80%	69%	64%	63%	56%	49%	51%	11%
Italy	86%	67%	66%	58%	62%	50%	41%	6%
Japan	75%	60%	60%	58%	49%	46%	43%	16%
Netherlands	73%	52%	59%	53%	52%	40%	39%	17%
Poland	79%	60%	58%	60%	51%	46%	44%	15%
Portugal	87%	63%	65%	61%	56%	40%	42%	8%
United Kingdom	76%	64%	64%	63%	56%	48%	46%	14%
Turkey	87%	69%	68%	63%	62%	59%	57%	5%
European average	**80%**	**63%**	**62%**	**58%**	**56%**	**44%**	**43%**	**12%**
15-country average	**80%**	**62%**	**61%**	**59%**	**55%**	**47%**	**44%**	**11%**

When it comes to cars, would you say that you...
Select one answer only.

	Love them	Like them	Are somewhat interested	Are not interested
South Africa	40%	29%	29%	2%
Germany	27%	16%	43%	14%
Belgium	18%	28%	35%	19%
Brazil	48%	32%	16%	4%
China	13%	36%	31%	20%
Spain	27%	34%	32%	7%
United States	36%	25%	27%	12%
France	17%	33%	31%	19%
Italy	4%	44%	41%	11%
Japan	14%	19%	39%	28%
Netherlands	23%	19%	41%	17%
Poland	24%	25%	41%	10%
Portugal	22%	21%	48%	9%
United Kingdom	23%	25%	34%	18%
Turkey	43%	22%	25%	10%
European average	**21%**	**27%**	**38%**	**14%**
15-country average	**25%**	**27%**	**34%**	**14%**

How attached are you to the following items?
Select one answer per statement. Score between 1 (not at all attached) and 10 (very attached).

	Your mobile phone	Your car	Your home	Your laptop computer
South Africa	8.52	6.87	8.41	7.00
Germany	6.31	6.10	8.02	5.84
Belgium	7.29	6.70	8.35	6.84
Brazil	8.24	6.89	8.45	6.87
China	8.07	6.07	8.25	5.88
Spain	7.39	7.29	8.56	6.96
United States	7.65	6.76	7.46	6.06
France	6.98	6.55	7.92	6.55
Italy	7.51	7.27	8.40	7.08
Japan	6.17	5.76	7.08	5.10
Netherlands	7.21	6.52	8.23	6.47
Poland	8.04	6.88	8.58	7.32
Portugal	7.39	7.12	8.51	7.05
United Kingdom	6.72	6.01	7.63	5.98
Turkey	7.77	6.56	8.10	6.67
European average	**7.20**	**6.72**	**8.24**	**6.68**
15-country average	**7.42**	**6.62**	**8.13**	**6.51**

Do you believe that too much or not enough importance is placed on cars in today's world?
Select one answer only.

	Too much importance	Not enough importance	Neither too much nor not enough importance
South Africa	69%	6%	25%
Germany	42%	7%	51%
Belgium	49%	9%	42%
Brazil	71%	8%	21%
China	57%	13%	30%
Spain	48%	9%	43%
United States	47%	13%	40%
France	46%	7%	47%
Italy	59%	12%	29%
Japan	65%	17%	18%
Netherlands	42%	13%	45%
Poland	58%	11%	31%
Portugal	73%	4%	23%
United Kingdom	39%	17%	44%
Turkey	77%	13%	10%
European average	**51%**	**10%**	**39%**
15-country average	**56%**	**11%**	**33%**

Do you believe that the space given to cars in cities (lanes, parking spaces, car parks, etc.) is…
Select one answer only.

	Being reduced	Being increased	Stabilising
South Africa	12%	70%	18%
Germany	49%	20%	31%
Belgium	48%	31%	21%
Brazil	45%	37%	18%
China	8%	61%	31%
Spain	32%	27%	41%
United States	27%	45%	28%
France	58%	19%	23%
Italy	23%	41%	36%
Japan	41%	22%	37%
Netherlands	35%	37%	28%
Poland	15%	64%	21%
Portugal	28%	48%	24%
United Kingdom	33%	43%	24%
Turkey	22%	65%	13%
European average	**35%**	**37%**	**28%**
15-country average	**32%**	**42%**	**26%**

Do you believe it would be beneficial to reduce the space given to cars in cities (lanes, parking spaces, car parks, etc.)?
Select one answer only.

	Highly beneficial	Somewhat beneficial	Not very beneficial	Not at all beneficial
South Africa	15%	40%	33%	12%
Germany	27%	43%	20%	10%
Belgium	17%	36%	34%	13%
Brazil	12%	40%	30%	18%
China	12%	42%	34%	12%
Spain	18%	54%	23%	5%
United States	24%	34%	30%	12%
France	21%	42%	25%	12%
Italy	21%	57%	17%	5%
Japan	12%	48%	31%	9%
Netherlands	16%	44%	33%	7%
Poland	17%	53%	22%	8%
Portugal	26%	52%	17%	5%
United Kingdom	19%	49%	25%	7%
Turkey	29%	44%	19%	8%
European average	**20%**	**48%**	**24%**	**8%**
15-country average	**19%**	**45%**	**26%**	**10%**

Would you be prepared to live without a car?
Select one answer only.

	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	9%	26%	39%	26%
Germany	22%	23%	40%	15%
Belgium	13%	20%	37%	30%
Brazil	18%	36%	28%	18%
China	12%	33%	38%	17%
Spain	14%	33%	43%	10%
United States	20%	22%	30%	28%
France	14%	21%	35%	30%
Italy	9%	31%	33%	27%
Japan	10%	24%	30%	36%
Netherlands	18%	27%	38%	17%
Poland	26%	34%	31%	9%
Portugal	12%	29%	38%	21%
United Kingdom	23%	28%	30%	19%
Turkey	23%	44%	25%	8%
European average	**17%**	**27%**	**36%**	**20%**
15-country average	**16%**	**29%**	**34%**	**21%**

Over the last few years, would you say that your car use...
Select one answer only.

	Has increased	Has neither increased nor decreased	Has decreased
South Africa	47%	35%	18%
Germany	23%	55%	22%
Belgium	23%	50%	27%
Brazil	51%	32%	17%
China	66%	30%	4%
Spain	31%	47%	22%
United States	31%	41%	28%
France	23%	57%	20%
Italy	31%	53%	16%
Japan	24%	66%	10%
Netherlands	21%	51%	28%
Poland	40%	49%	11%
Portugal	28%	52%	20%
United Kingdom	29%	44%	27%
Turkey	65%	27%	8%
European average	**27%**	**51%**	**22%**
15-country average	**35%**	**46%**	**19%**

Why are you attached to your car?
Many possible responses. Answers of those who assigned a score of 5 or more to their attachment to their car.

	It's practical	It makes it easier to meet people and interact	It's a valuable object	It's beautiful	It's the best place to get some peace	It's like a friend	It holds lots of happy memories	It enhances your status	It's a second home
South Africa	70%	33%	67%	38%	32%	35%	44%	38%	24%
Germany	69%	52%	31%	31%	20%	23%	18%	12%	14%
Belgium	80%	33%	27%	17%	13%	11%	12%	11%	14%
Brazil	70%	53%	41%	21%	19%	20%	22%	32%	19%
China	57%	40%	21%	22%	41%	50%	30%	34%	29%
Spain	73%	50%	22%	27%	18%	20%	20%	18%	16%
United States	66%	23%	52%	28%	32%	32%	28%	27%	20%
France	82%	19%	24%	23%	19%	11%	15%	9%	13%
Italy	78%	26%	16%	18%	22%	29%	20%	13%	21%
Japan	62%	37%	21%	10%	15%	17%	34%	17%	20%
Netherlands	70%	43%	28%	17%	14%	11%	14%	16%	7%
Poland	81%	55%	31%	18%	18%	24%	26%	25%	21%
Portugal	77%	41%	34%	17%	11%	14%	17%	47%	13%
United Kingdom	64%	31%	45%	20%	24%	29%	19%	16%	12%
Turkey	60%	35%	39%	39%	32%	42%	26%	25%	28%
European average	**75%**	**39%**	**28%**	**21%**	**18%**	**19%**	**18%**	**19%**	**15%**
15-country average	**71%**	**38%**	**33%**	**23%**	**22%**	**24%**	**23%**	**23%**	**18%**

What are the main purposes for which you use your car(s)?
Select a maximum of two answers.

	You use your car for your daily journeys: to go to work, to do your shopping, to transport your children, etc.	You use your car to make long journeys such as going on holiday, going away for the weekend, etc.	You use your car simply for the pleasure of driving	You carpool as a driver	Other
South Africa	91%	38%	18%	10%	2%
Germany	83%	52%	16%	3%	3%
Belgium	85%	49%	13%	4%	4%
Brazil	91%	39%	17%	8%	2%
China	93%	58%	13%	8%	1%
Spain	74%	46%	11%	6%	3%
United States	87%	38%	22%	6%	2%
France	85%	51%	13%	8%	1%
Italy	90%	45%	12%	2%	1%
Japan	86%	53%	10%	12%	1%
Netherlands	74%	46%	27%	5%	2%
Poland	83%	44%	29%	13%	3%
Portugal	85%	40%	7%	9%	4%
United Kingdom	85%	51%	20%	7%	2%
Turkey	87%	49%	9%	7%	2%
European average	**83%**	**47%**	**16%**	**6%**	**2%**
15-country average	**85%**	**46%**	**16%**	**7%**	**2%**

Since the COVID-19 crisis began, would you say that your car use...
Many possible responses. Answers of those who assigned a score of 5 or more to their attachment to their car.

	For daily journeys and commuting to work			For private journeys and leisure (food and other shopping, sporting activities, etc.)			To go away for the weekend and on holiday		
	Has increased	Has decreased	Has neither increased nor decreased	Has increased	Has decreased	Has neither increased nor decreased	Has increased	Has decreased	Has neither increased nor decreased
South Africa	19%	60%	21%	19%	65%	16%	6%	82%	12%
Germany	18%	25%	57%	17%	30%	53%	14%	44%	42%
Belgium	14%	41%	45%	14%	49%	37%	12%	53%	35%
Brazil	31%	44%	25%	25%	56%	19%	11%	75%	14%
China	51%	32%	17%	40%	48%	12%	30%	53%	17%
Spain	21%	37%	42%	22%	45%	33%	18%	51%	31%
United States	24%	38%	38%	20%	50%	30%	17%	53%	30%
France	18%	31%	51%	16%	39%	45%	14%	44%	42%
Italy	26%	40%	34%	25%	46%	29%	18%	52%	30%
Japan	22%	20%	58%	17%	39%	44%	9%	53%	38%
Netherlands	16%	35%	49%	18%	42%	40%	13%	55%	32%
Poland	31%	23%	46%	28%	33%	39%	23%	39%	38%
Portugal	14%	52%	34%	13%	54%	33%	8%	68%	24%
United Kingdom	25%	48%	27%	20%	53%	27%	15%	59%	26%
Turkey	60%	21%	19%	46%	43%	11%	30%	51%	19%
European average	**20%**	**37%**	**43%**	**19%**	**44%**	**37%**	**15%**	**52%**	**33%**
15-country average	**25%**	**37%**	**38%**	**22%**	**46%**	**32%**	**16%**	**55%**	**29%**

Do the following statements reflect the image you have of your car? 1/2
Select one answer per statement.

	It's a place to relax			It's just another form of transport		
	Yes and more so since the start of the health crisis	Yes, but no more than before the start of the health crisis	No	Yes and more so since the start of the health crisis	Yes, but no more than before the start of the health crisis	No
South Africa	44%	30%	26%	49%	38%	13%
Germany	34%	23%	43%	33%	32%	35%
Belgium	23%	29%	48%	24%	50%	26%
Brazil	34%	30%	36%	30%	30%	40%
China	53%	31%	16%	27%	27%	46%
Spain	28%	32%	40%	31%	39%	30%
United States	38%	34%	28%	38%	48%	14%
France	27%	34%	39%	28%	46%	26%
Italy	34%	30%	36%	29%	36%	35%
Japan	28%	54%	18%	31%	60%	9%
Netherlands	23%	40%	37%	27%	52%	21%
Poland	27%	56%	17%	27%	53%	20%
Portugal	24%	35%	41%	30%	41%	29%
United Kingdom	33%	35%	32%	35%	44%	21%
Turkey	61%	29%	10%	34%	34%	32%
European average	**28%**	**35%**	**37%**	**29%**	**44%**	**27%**
15-country average	**34%**	**35%**	**31%**	**31%**	**42%**	**27%**

Do the following statements reflect the image you have of your car? 2/2
Select one answer per statement.

	It protects me from the outside world			It's a form of transport that offers incomparable freedom to travel		
	Yes and more so since the start of the health crisis	Yes, but no more than before the start of the health crisis	No	Yes and more so since the start of the health crisis	Yes, but no more than before the start of the health crisis	No
South Africa	55%	27%	18%	51%	39%	10%
Germany	49%	16%	35%	51%	34%	15%
Belgium	33%	31%	36%	39%	52%	9%
Brazil	52%	26%	22%	56%	37%	7%
China	64%	27%	9%	61%	31%	8%
Spain	48%	25%	27%	48%	44%	8%
United States	43%	36%	21%	38%	47%	15%
France	45%	34%	21%	44%	47%	9%
Italy	45%	27%	28%	49%	42%	9%
Japan	33%	46%	21%	32%	55%	13%
Netherlands	30%	29%	41%	36%	51%	13%
Poland	49%	37%	14%	43%	53%	4%
Portugal	47%	28%	25%	45%	45%	10%
United Kingdom	46%	29%	25%	46%	42%	12%
Turkey	61%	26%	13%	64%	26%	10%
European average	**44%**	**28%**	**28%**	**45%**	**45%**	**10%**
15-country average	**46%**	**30%**	**24%**	**47%**	**43%**	**10%**

Are you in favour of or opposed to urban planning that makes more space for sustainable modes of travel and pedestrians (walking, cycling, scooters, etc.), even if it means penalising or restricting the use of cars?
Select one answer only.

	Strongly in favour	Somewhat in favour	Somewhat opposed	Strongly opposed
South Africa	49%	37%	11%	3%
Germany	33%	43%	16%	8%
Belgium	24%	44%	22%	10%
Brazil	52%	44%	4%	0%
China	28%	64%	8%	0%
Spain	37%	50%	9%	4%
United States	34%	44%	14%	8%
France	27%	46%	19%	8%
Italy	33%	55%	10%	2%
Japan	20%	57%	18%	5%
Netherlands	24%	47%	20%	9%
Poland	32%	48%	16%	4%
Portugal	53%	39%	6%	2%
United Kingdom	29%	51%	16%	4%
Turkey	54%	33%	10%	3%
European average	**32%**	**47%**	**15%**	**6%**
15-country average	**35%**	**47%**	**13%**	**5%**

Do you consider measures to restrict vehicle traffic so as to curb pollution (road space rationing, congestion charges, banning certain vehicles, etc.) to be... 1/3
Select one answer only.

	Essential				Too common			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	43%	41%	15%	1%	17%	42%	36%	5%
Germany	25%	33%	29%	13%	17%	37%	33%	13%
Belgium	18%	40%	30%	12%	22%	36%	34%	8%
Brazil	35%	43%	15%	7%	15%	35%	34%	16%
China	31%	51%	17%	1%	12%	39%	39%	10%
Spain	32%	44%	21%	3%	13%	34%	44%	9%
United States	34%	40%	20%	6%	24%	35%	33%	8%
France	25%	40%	25%	10%	22%	33%	35%	10%
Italy	31%	44%	18%	7%	16%	34%	36%	14%
Japan	19%	56%	19%	6%	12%	39%	41%	8%
Netherlands	21%	42%	28%	9%	15%	40%	37%	8%
Poland	33%	47%	14%	6%	19%	36%	37%	8%
Portugal	36%	39%	21%	4%	16%	26%	45%	13%
United Kingdom	27%	42%	25%	6%	20%	39%	34%	7%
Turkey	56%	31%	11%	2%	32%	32%	31%	5%
European average	**27%**	**41%**	**24%**	**8%**	**18%**	**35%**	**37%**	**10%**
15-country average	**31%**	**42%**	**21%**	**6%**	**18%**	**36%**	**37%**	**9%**

Do you consider measures to restrict vehicle traffic so as to curb pollution (road space rationing, congestion charges, banning certain vehicles, etc.) to be... 2/3
Select one answer only.

	Sufficiently restrictive				Effective			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	19%	42%	34%	5%	26%	39%	29%	6%
Germany	18%	33%	38%	11%	17%	28%	42%	13%
Belgium	21%	44%	30%	5%	8%	38%	41%	13%
Brazil	14%	50%	29%	7%	24%	41%	29%	6%
China	24%	44%	27%	5%	32%	51%	15%	2%
Spain	15%	46%	33%	6%	19%	47%	31%	3%
United States	28%	39%	26%	7%	29%	40%	25%	6%
France	25%	47%	22%	6%	13%	36%	39%	12%
Italy	17%	53%	23%	7%	19%	45%	28%	8%
Japan	19%	59%	18%	4%	18%	59%	19%	4%
Netherlands	14%	47%	33%	6%	9%	47%	36%	8%
Poland	17%	47%	31%	5%	16%	49%	28%	7%
Portugal	13%	44%	38%	5%	15%	39%	39%	7%
United Kingdom	21%	43%	32%	4%	19%	46%	29%	6%
Turkey	32%	39%	24%	5%	42%	30%	25%	3%
European average	**18%**	**45%**	**31%**	**6%**	**15%**	**42%**	**35%**	**8%**
15-country average	**20%**	**45%**	**29%**	**6%**	**21%**	**42%**	**30%**	**7%**

Do you consider measures to restrict vehicle traffic so as to curb pollution (road space rationing, congestion charges, banning certain vehicles, etc.) to be... 3/3
Select one answer only.

	Useful			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	37%	40%	20%	3%
Germany	23%	35%	30%	12%
Belgium	17%	41%	30%	12%
Brazil	42%	42%	12%	4%
China	35%	51%	13%	1%
Spain	26%	51%	21%	2%
United States	32%	45%	17%	6%
France	24%	44%	23%	9%
Italy	29%	44%	20%	7%
Japan	18%	59%	19%	4%
Netherlands	19%	48%	25%	8%
Poland	29%	53%	13%	5%
Portugal	38%	38%	21%	3%
United Kingdom	20%	51%	22%	7%
Turkey	52%	34%	11%	3%
European average	**25%**	**45%**	**23%**	**7%**
15-country average	**29%**	**45%**	**20%**	**6%**

You believe that buying a used car less than one-year old is...
Select one answer only.

	A good compromise	Still too expensive compared to a real used car	A good deal	A cost-effective way of buying a higher-end vehicle	Not worthwhile
South Africa	32%	18%	22%	18%	10%
Germany	26%	25%	19%	11%	19%
Belgium	23%	24%	17%	18%	18%
Brazil	30%	15%	25%	16%	14%
China	33%	14%	14%	9%	30%
Spain	26%	19%	26%	14%	15%
United States	23%	18%	28%	15%	16%
France	30%	26%	20%	14%	10%
Italy	38%	21%	14%	16%	11%
Japan	20%	21%	14%	9%	36%
Netherlands	14%	30%	12%	28%	16%
Poland	26%	33%	18%	16%	7%
Portugal	20%	19%	23%	29%	9%
United Kingdom	23%	24%	18%	19%	16%
Turkey	20%	21%	18%	25%	16%
European average	**25%**	**24%**	**19%**	**18%**	**14%**
15-country average	**26%**	**22%**	**19%**	**17%**	**16%**

To reduce your vehicle budget, on which vehicle characteristics would you be prepared to compromise? 1/2
Select a maximum of three answers. Answers of respondents who are planning to buy a car in the next 12 months and whose budget has been cut as a result of the crisis.

	Vehicle size	Opting for a used vehicle	Opting for a car from a less prestigious or low-cost brand	Image, status	Sportiness and power (acceleration, top speed)	Navigation and communication equipment (satnav, sound system, hands-free phone kit)	Opting for a car that is neither hybrid nor electric
South Africa	41%	44%	34%	26%	22%	18%	16%
Germany	19%	19%	29%	9%	25%	6%	27%
Belgium	23%	27%	34%	8%	23%	40%	18%
Brazil	28%	24%	25%	12%	18%	28%	13%
China	27%	7%	25%	16%	15%	23%	14%
Spain	32%	25%	28%	23%	27%	21%	20%
United States	37%	39%	16%	12%	14%	21%	32%
France	30%	29%	26%	27%	19%	15%	20%
Italy	38%	22%	32%	13%	31%	17%	10%
Japan	36%	6%	41%	18%	13%	0%	22%
Netherlands	24%	39%	22%	7%	4%	23%	27%
Poland	30%	34%	29%	21%	15%	24%	27%
Portugal	40%	26%	20%	25%	21%	30%	17%
United Kingdom	27%	29%	28%	11%	11%	24%	20%
Turkey	34%	29%	10%	31%	29%	24%	18%
European average	**31%**	**27%**	**28%**	**17%**	**22%**	**21%**	**19%**
15-country average	**32%**	**27%**	**26%**	**18%**	**21%**	**22%**	**18%**

To reduce your vehicle budget, on which vehicle characteristics would you be prepared to compromise? 2/2
Select a maximum of three answers. Answers of respondents who are planning to buy a car in the next 12 months and whose budget has been cut as a result of the crisis.

	Interior comfort (quality of the materials, the seats, etc.)	Warranty (duration and level of cover)	After-sales contract (service frequency, maintenance, etc.)	Environmental protection (engine efficiency, particle filter, etc.)	Durability and reliability	Control, agility and handling (road holding, manoeuvrability, etc.)	Active and passive safety (resistance to impacts, ABS, airbags)
South Africa	14%	15%	11%	11%	5%	5%	7%
Germany	18%	10%	16%	28%	22%	3%	12%
Belgium	10%	19%	8%	18%	12%	4%	4%
Brazil	20%	15%	22%	15%	9%	9%	19%
China	27%	16%	16%	20%	11%	17%	12%
Spain	9%	26%	14%	13%	7%	6%	12%
United States	13%	12%	21%	3%	5%	11%	5%
France	16%	17%	15%	11%	9%	8%	8%
Italy	19%	10%	9%	10%	14%	12%	7%
Japan	0%	11%	30%	17%	8%	11%	21%
Netherlands	9%	21%	13%	13%	3%	21%	4%
Poland	22%	15%	15%	17%	6%	7%	5%
Portugal	13%	9%	16%	21%	3%	9%	5%
United Kingdom	9%	7%	4%	10%	15%	15%	15%
Turkey	17%	20%	19%	11%	10%	7%	6%
European average	**15%**	**14%**	**12%**	**15%**	**10%**	**10%**	**8%**
15-country average	**16%**	**15%**	**15%**	**14%**	**9%**	**10%**	**10%**

Are you more likely to buy a car that is manufactured or assembled, wholly or partially, in your home country?
Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.

	Yes, definitely	Yes, probably	No, probably not	No, definitely not	You don't know
South Africa	41%	30%	17%	4%	8%
Germany	40%	38%	14%	0%	8%
Belgium	8%	25%	22%	16%	29%
Brazil	35%	45%	5%	3%	12%
China	16%	59%	18%	4%	3%
Spain	34%	52%	7%	0%	7%
United States	52%	29%	9%	2%	8%
France	27%	40%	11%	4%	18%
Italy	36%	41%	9%	3%	11%
Japan	29%	56%	11%	1%	3%
Netherlands	20%	28%	29%	15%	8%
Poland	26%	31%	19%	7%	17%
Portugal	34%	34%	20%	7%	5%
United Kingdom	31%	39%	15%	4%	11%
Turkey	47%	41%	9%	2%	1%
European average	**30%**	**38%**	**15%**	**5%**	**12%**
15-country average	**34%**	**40%**	**13%**	**4%**	**9%**

Should government grants to help people purchase a vehicle be dependent on household income?
Select one answer only.

	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	36%	37%	19%	8%
Germany	34%	39%	19%	8%
Belgium	25%	40%	23%	12%
Brazil	39%	40%	14%	7%
China	24%	54%	19%	3%
Spain	38%	43%	15%	4%
United States	32%	37%	18%	13%
France	33%	38%	18%	11%
Italy	41%	41%	11%	7%
Japan	19%	47%	25%	9%
Netherlands	25%	36%	23%	16%
Poland	39%	40%	14%	7%
Portugal	47%	34%	13%	6%
United Kingdom	26%	41%	23%	10%
Turkey	53%	29%	10%	8%
European average	**34%**	**39%**	**18%**	**9%**
15-country average	**34%**	**40%**	**18%**	**8%**

In your opinion, should all government subsidies to support the automotive industry depend on compliance with the following requirements? 1/3
Select one answer per statement.

	Preservation of all jobs				Production of all or part of the vehicle in the brand's country of origin			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	48%	35%	13%	4%	35%	35%	24%	6%
Germany	41%	37%	15%	7%	27%	45%	20%	8%
Belgium	43%	42%	13%	2%	22%	44%	28%	6%
Brazil	61%	31%	7%	1%	32%	38%	23%	7%
China	24%	53%	21%	2%	31%	46%	21%	2%
Spain	54%	34%	11%	1%	32%	42%	24%	2%
United States	39%	37%	18%	6%	31%	43%	20%	6%
France	48%	40%	9%	3%	40%	45%	12%	3%
Italy	57%	34%	8%	1%	45%	39%	15%	1%
Japan	20%	54%	22%	4%	14%	54%	28%	4%
Netherlands	35%	45%	17%	3%	20%	44%	31%	5%
Poland	52%	37%	9%	2%	28%	49%	18%	5%
Portugal	57%	33%	8%	2%	28%	34%	27%	11%
United Kingdom	34%	47%	16%	3%	29%	46%	22%	3%
Turkey	61%	27%	10%	2%	37%	36%	21%	6%
European average	**46%**	**39%**	**12%**	**3%**	**30%**	**43%**	**22%**	**5%**
15-country average	**45%**	**39%**	**13%**	**3%**	**30%**	**43%**	**22%**	**5%**

In your opinion, should all government subsidies to support the automotive industry depend on compliance with the following requirements? 2/3

Select one answer per statement.

	Reshoring of certain production activities				Production of a minimum percentage of environmentally friendly vehicles			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	31%	42%	24%	3%	47%	39%	12%	2%
Germany	18%	34%	33%	15%	32%	41%	18%	9%
Belgium	24%	41%	30%	5%	32%	49%	15%	4%
Brazil	30%	48%	18%	4%	59%	31%	7%	3%
China	24%	54%	21%	1%	35%	50%	14%	1%
Spain	29%	53%	16%	2%	44%	42%	13%	1%
United States	32%	38%	23%	7%	38%	38%	18%	6%
France	43%	40%	13%	4%	38%	48%	11%	3%
Italy	20%	41%	25%	14%	39%	45%	12%	4%
Japan	15%	50%	31%	4%	22%	57%	17%	4%
Netherlands	17%	45%	31%	7%	27%	45%	23%	5%
Poland	24%	56%	18%	2%	40%	43%	14%	3%
Portugal	25%	42%	28%	5%	49%	34%	12%	5%
United Kingdom	20%	45%	31%	4%	34%	49%	15%	2%
Turkey	41%	39%	15%	5%	38%	27%	19%	16%
European average	**24%**	**44%**	**25%**	**7%**	**37%**	**44%**	**15%**	**4%**
15-country average	**26%**	**45%**	**24%**	**5%**	**38%**	**42%**	**15%**	**5%**

In your opinion, should all government subsidies to support the automotive industry depend on compliance with the following requirements? 3/3

Select one answer per statement.

	A commitment by brands not to increase their prices for a certain period of time			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	54%	31%	12%	3%
Germany	31%	38%	22%	9%
Belgium	33%	47%	16%	4%
Brazil	57%	30%	10%	3%
China	23%	53%	22%	2%
Spain	49%	38%	11%	2%
United States	37%	40%	17%	6%
France	43%	43%	11%	3%
Italy	53%	38%	8%	1%
Japan	16%	53%	26%	5%
Netherlands	30%	40%	25%	5%
Poland	39%	44%	15%	2%
Portugal	52%	36%	10%	2%
United Kingdom	30%	48%	20%	2%
Turkey	52%	33%	12%	3%
European average	**40%**	**41%**	**16%**	**3%**
15-country average	**40%**	**41%**	**16%**	**3%**

What will be the energy source of the next vehicle you plan to buy?
Select one answer only. Answers of respondents who are planning to buy a car in the next 12 months.

	Petrol	Diesel	Electric	Hybrid	Other	Not sure yet
South Africa	44%	19%	8%	12%	0%	17%
Germany	37%	11%	12%	26%	1%	13%
Belgium	26%	19%	15%	23%	0%	17%
Brazil	33%	7%	8%	29%	4%	19%
China	36%	0%	28%	31%	0%	5%
Spain	9%	15%	17%	42%	1%	16%
United States	34%	9%	21%	19%	1%	16%
France	26%	18%	13%	27%	1%	15%
Italy	9%	14%	17%	43%	1%	16%
Japan	34%	9%	19%	34%	0%	4%
Netherlands	43%	13%	23%	14%	0%	7%
Poland	34%	15%	9%	29%	0%	13%
Portugal	16%	15%	24%	18%	2%	25%
United Kingdom	28%	15%	27%	19%	0%	11%
Turkey	21%	28%	24%	15%	2%	10%
European average	**23%**	**15%**	**17%**	**29%**	**1%**	**15%**
15-country average	**28%**	**14%**	**17%**	**26%**	**1%**	**14%**

Do you believe that electric cars could be a solution to the following problems? 1/2
Select one answer only.

	Air pollution (fine particles, etc.)				Global warming (CO_2 emissions, etc.)			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	64%	25%	9%	2%	55%	34%	9%	2%
Germany	31%	42%	16%	11%	24%	35%	27%	14%
Belgium	33%	41%	18%	8%	23%	38%	27%	12%
Brazil	68%	28%	3%	1%	63%	31%	4%	2%
China	41%	46%	12%	1%	40%	41%	16%	3%
Spain	47%	41%	11%	1%	47%	43%	8%	2%
United States	46%	37%	12%	5%	42%	36%	15%	7%
France	35%	44%	14%	7%	27%	40%	22%	11%
Italy	54%	38%	7%	1%	46%	41%	11%	2%
Japan	28%	55%	12%	5%	23%	54%	17%	6%
Netherlands	34%	42%	17%	7%	29%	37%	25%	9%
Poland	52%	38%	6%	4%	42%	41%	13%	4%
Portugal	61%	31%	5%	3%	60%	29%	8%	3%
United Kingdom	40%	45%	12%	3%	35%	43%	18%	4%
Turkey	65%	28%	5%	2%	60%	29%	8%	3%
European average	**43%**	**40%**	**12%**	**5%**	**37%**	**38%**	**18%**	**7%**
15-country average	**46%**	**39%**	**11%**	**4%**	**41%**	**38%**	**15%**	**6%**

Do you believe that electric cars could be a solution to the following problems? 2/2
Select one answer only.

	Noise pollution			
	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	50%	31%	15%	4%
Germany	36%	41%	14%	9%
Belgium	37%	44%	13%	6%
Brazil	57%	29%	13%	1%
China	32%	46%	19%	3%
Spain	46%	42%	11%	1%
United States	42%	32%	19%	7%
France	40%	43%	12%	5%
Italy	47%	39%	12%	2%
Japan	23%	56%	16%	5%
Netherlands	39%	41%	14%	6%
Poland	51%	37%	9%	3%
Portugal	63%	29%	6%	2%
United Kingdom	39%	40%	19%	2%
Turkey	59%	25%	13%	3%
European average	44%	40%	12%	4%
15-country average	44%	38%	14%	4%

To make the use of electric cars more practical, would you say that the charging network should be developed primarily by...
Select one answer only.

	The government	Local authorities	Automakers	Users	Energy companies/ private companies specialising in this area
South Africa	18%	6%	22%	11%	43%
Germany	32%	19%	20%	5%	24%
Belgium	35%	10%	17%	6%	32%
Brazil	20%	8%	16%	9%	47%
China	33%	19%	15%	7%	26%
Spain	36%	9%	16%	4%	35%
United States	16%	10%	23%	17%	34%
France	34%	17%	20%	7%	22%
Italy	32%	11%	17%	7%	33%
Japan	26%	17%	19%	12%	26%
Netherlands	38%	18%	12%	10%	22%
Poland	29%	9%	24%	9%	29%
Portugal	31%	17%	15%	9%	28%
United Kingdom	34%	13%	13%	17%	23%
Turkey	33%	14%	11%	14%	28%
European average	33%	14%	17%	8%	28%
15-country average	30%	13%	17%	10%	30%

Do you believe electric vehicles are a way of securing the future of the automotive industry?
Select one answer only.

	Yes, absolutely	Yes, somewhat	No, not really	No, not at all
South Africa	45%	41%	12%	2%
Germany	16%	40%	30%	14%
Belgium	13%	42%	33%	12%
Brazil	48%	43%	8%	1%
China	20%	64%	14%	2%
Spain	34%	52%	13%	1%
United States	32%	39%	20%	9%
France	16%	46%	26%	12%
Italy	34%	52%	10%	4%
Japan	13%	59%	24%	4%
Netherlands	20%	44%	27%	9%
Poland	35%	52%	10%	3%
Portugal	35%	47%	15%	3%
United Kingdom	23%	54%	19%	4%
Turkey	47%	40%	11%	2%
European average	**25%**	**48%**	**20%**	**7%**
15-country average	**29%**	**48%**	**18%**	**5%**

What do you imagine cars will be like in 5 to 10 years' time?
Select one answer only.

	More economical	Very high-tech	More sustainable	Autonomous	Shared	Minimalist	Like today	Sensible
South Africa	57%	71%	33%	34%	13%	12%	4%	9%
Germany	30%	48%	15%	22%	18%	11%	21%	8%
Belgium	43%	42%	40%	19%	11%	8%	13%	8%
Brazil	72%	55%	29%	31%	16%	11%	3%	8%
China	56%	49%	47%	20%	40%	31%	3%	14%
Spain	21%	62%	17%	36%	14%	10%	10%	10%
United States	46%	48%	29%	28%	11%	16%	12%	12%
France	51%	35%	32%	26%	9%	7%	14%	15%
Italy	22%	65%	18%	32%	18%	8%	10%	6%
Japan	36%	26%	21%	51%	31%	10%	9%	5%
Netherlands	37%	30%	58%	13%	14%	8%	16%	5%
Poland	52%	53%	17%	19%	8%	12%	9%	7%
Portugal	61%	50%	18%	40%	14%	10%	8%	3%
United Kingdom	51%	45%	23%	23%	8%	14%	11%	8%
Turkey	42%	48%	36%	37%	16%	24%	6%	18%
European average	**41%**	**48%**	**26%**	**25%**	**13%**	**10%**	**12%**	**8%**
15-country average	**45%**	**48%**	**29%**	**29%**	**16%**	**13%**	**10%**	**9%**

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www.consorsfinanz.de

Contact:

presse@consorsfinanz.de

CONSORS FINANZ
BNP PARIBAS

BNP Paribas S.A. Niederlassung Deutschland
Schwanthalerstraße 31, 80336 München