

# ANNEXES

## Detailed survey results

**Tabl. 1 ▶ Worldwide registration of new passenger cars and light commercial vehicles**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
World (in millions of units)	64	66	69	65	62	71	75	79	82	86	87

**Tabl. 2 ▶ In your opinion, when the media (TV, press, etc.) and politicians talk about cars, do they speak positively or negatively?**

One answer only % - negative view: sum of "quite negatively" and "very negatively"

**Do you believe this is justified?** One answer only. % negative/justified: in % of total respondents in the country

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Negative view	57%	44%	22%	48%	21%	19%	31%	44%	30%	42%	19%	8%	29%	20%	19%	<b>31%</b>
Justified negative view	30%	18%	12%	20%	10%	7%	9%	16%	8%	19%	12%	5%	14%	10%	10%	<b>14%</b>

**Tabl. 3 ▶ Recently, some car brands have been in the news for failing to comply with the energy and environmental performances stated for their vehicles. Would you say that...**

One answer only (excl. "Don't know")

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
This has not had an impact on your view of these brands	43%	51%	40%	43%	38%	59%	46%	42%	38%	41%	41%	45%	45%	46%	52%	<b>44%</b>
This has had a negative impact on your view of these brands	57%	49%	60%	57%	62%	41%	54%	58%	62%	59%	59%	55%	55%	54%	48%	<b>56%</b>

**Tabl. 4 ▶ Recently, some car brands have been in the news for failing to comply with the energy and environmental performances stated for their vehicles. Would you say that...**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
This means that you have avoided/will avoid these brands when you next buy a car	50%	41%	56%	48%	64%	40%	49%	49%	51%	51%	57%	63%	57%	61%	48%	<b>52%</b>
This has had no impact on the brand you choose when you next buy a car	50%	59%	44%	52%	36%	60%	51%	51%	49%	49%	43%	37%	43%	39%	52%	<b>48%</b>

**Tabl. 5 ▶ What image do you have of cars in general?**

One answer only

	15-country average
Very good	23%
Quite good	66%
Quite bad	9%
Very bad	1%

**Tabl. 6 ▶ I love to drive**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Agree	81%	89%	83%	81%	83%	91%	91%	75%	66%	69%	88%	95%	93%	95%	89%	<b>84%</b>
Disagree	19%	12%	17%	19%	17%	9%	9%	25%	34%	31%	13%	5%	7%	5%	11%	<b>16%</b>

**Tabl. 7 ▶ General speaking, compared to 20 years ago, cars today...**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Capture people's imagination more than they did 20 years ago	30%	26%	43%	29%	38%	36%	51%	31%	21%	22%	59%	69%	53%	73%	67%	<b>42%</b>
Capture people's imagination as much as they did 20 years ago	90%	86%	96%	85%	87%	92%	95%	92%	66%	88%	95%	91%	95%	94%	97%	<b>90%</b>

**Tabl. 8 ▶ Number of visitors to the leading motor shows**

	Frankfurt	Paris	Geneva	Detroit	Shanghai	Istanbul
2012		1 231 416		770 932		
2013	900 000		690 000	795 416	813 000	44 000
2014		1 253 513	670 000	803 451		
2015	931 700		682 191	808 775	928 000	44 469
2016			687 000	815 575		

**Tabl. 9 ▶ Stock market value of the 10 most powerful car brands**

	Base 100 = 2016
2007	115
2008	123
2009	96
2010	82
2011	88
2012	81
2013	86
2014	100
2015	103
2016	100

**Tabl. 10 ▶ I am really tempted by some of the new models of car launched on the market**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Agree	53%	71%	70%	71%	74%	73%	79%	58%	36%	60%	91%	86%	89%	88%	89%	<b>72%</b>
Disagree	47%	29%	30%	29%	26%	27%	21%	42%	64%	40%	9%	14%	11%	12%	11%	<b>28%</b>

**Tabl. 11** ▶ Variation in the market share of SUVs as a proportion of new light vehicle registrations

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belgium				8.60%	9.20%	10.30%	12.30%	14.60%	16.50%	20%	22.20%
Germany				8.70%	7.50%	11.90%	13.30%	16.10%	17%	18.60%	19.90%
Spain				9%	10.80%	14%	15.90%	17.30%	18.40%	20.80%	24.60%
France				4.70%	4.60%	6.60%	10.10%	12.40%	16%	20.10%	22.90%
Italy				9.10%	8.70%	10.80%	13.30%	15%	16.50%	20.20%	24.20%
Poland				9%	10.80%	-	16.50%	19.40%	20.90%	22.90%	24.50%
Portugal				3.90%	5.10%	7%	9%	9.10%	11.30%	12.90%	15%
United Kingdom				7.70%	8.50%	11.20%	13.10%	15.10%	17.80%	20.50%	24.10%
Japan				5.80%	4.80%	5.40%	5.90%	5.40%	5.10%	10.80%	11.80%
United States				42%	42.20%	45.30%	46.90%	44.50%	46.30%	48.30%	52.10%
Brazil				4.90%	4.70%	5.10%	7.40%	7.10%	7.70%	8.60%	12.30%
China	4%	4%	5%	7%	7%	10%	12%	14%	17.58%	20.57%	22.09%
Mexico				23.20%	21.40%	20.90%	18.40%	18.50%	20.40%	21.10%	21.30%
Turkey				7.80%	6.40%	8%	9%	10.70%	11.10%	12.10%	14%
South Africa							13.90%	15.50%	16.70%	17.50%	18%

**Tabl. 12** ▶ I am excited by high-end cars (Audi, BMW, Mercedes, Lexus, etc.)

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Agree completely	18%	18%	20%	19%	25%	19%	25%	14%	13%	12%	48%	41%	38%	53%	43%	<b>26%</b>
Agree somewhat	29%	30%	38%	33%	35%	35%	33%	31%	25%	25%	27%	45%	34%	25%	32%	<b>32%</b>

**Tabl. 13** ▶ Popularity index of online searches for premium brands Audi, BMW and Mercedes (Base 100 = 2014)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Belgium	92	94	95	89	88	91	100	110	113
Germany	78	79	75	92	93	97	100	104	107
Spain	109	95	82	85	81	88	100	111	115
France	92	91	87	88	90	93	100	107	108
Italy	113	108	102	96	87	90	100	109	120
Poland	77	76	75	76	77	88	100	108	119
Portugal	96	96	95	85	82	85	100	117	119
United Kingdom	83	79	76	79	81	90	100	107	114
Japan	137	142	156	129	113	100	100	99	93
United States	96	92	93	96	95	98	100	102	102
Brazil	86	84	92	92	87	95	100	115	120
Mexico	99	89	86	82	85	94	100	109	111
Turkey	85	88	90	88	88	95	100	114	116
South Africa	106	109	120	106	105	112	100	109	108
China							100	133	151

**Tabl. 14** ▶ Variation in the market share of premium brands as a proportion of total passenger car registrations

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belgium				20.60%	20.15%	19.90%	20.04%	22.98%	23.28%	24.37%	26.83%
Germany				29.90%	21.70%	28.40%	28.20%	29.30%	29.10%	29%	29.10%
Spain				14.80%	13.40%	13.30%	14.60%	15.40%	15.50%	15.10%	15.20%
France				9.40%	7.20%	8.20%	9%	11%	11%	11.10%	11.80%
Italy				11.50%	10.40%	11.30%	12.60%	13.40%	14.40%	14.30%	14.20%
Poland				6.20%	6.50%	6.70%	7.50%	8.50%	8.80%	9.90%	11%
Portugal				14.50%	15.90%	15%	17.40%	22.90%	23.60%	24.10%	24.20%
United Kingdom				21.20%	20%	21.70%	24.10%	24.90%	24.90%	25.30%	26.90%
Japan				3.40%	3.20%	3.30%	4.70%	4.20%	4.90%	4.80%	5.70%
United States						11.30%					11.80%
Brazil				0.82%	0.96%	1.38%	1.45%	1.03%	1.40%	1.77%	2.79%
China	3.30%	3.90%	4.60%	5.30%	5%	5.80%	7.50%	8.70%	9%	9.70%	10.20%
Mexico				2.34%	2.60%	2.78%	3.29%	3.63%	3.86%	3.90%	3.60%
Turkey				6.70%	7.50%	7.90%	8.80%	9.20%	9.70%	13%	12.90%
South Africa								9.90%	14%	14.10%	13%

**Tabl. 15** ▶ Variation in the market share of hybrid cars as a proportion of total passenger car registrations

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Belgium	0.10%	0.20%	0.20%	0.40%	0.40%	0.70%	1.10%	1%	1.20%	1.70%	1.90%
Germany				0.20%	0.20%	0.40%	0.40%	0.70%	0.90%	1.10%	1.40%
Spain				0.30%	0.50%	0.70%	1.20%	1.20%	1.30%	1.50%	
France					0.40%	0.50%	0.60%	1.50%	2.70%	2.50%	3.30%
Italy				0.16%	0.35%	0.24%	0.29%	0.47%	1.10%	1.60%	1.70%
Portugal				0.80%	0.70%	0.70%	0.60%	1%	1%	1.30%	
United Kingdom				0.70%	0.70%	1.10%	1.20%	1.20%	1.30%	1.50%	1.70%
Japan						11.40%	12.90%	19.70%	20.40%	21.80%	21.30%
United States							2.17%	3.27%	3.49%	3.10%	2.50%
China							0.01%	0.05%	0.06%	0.20%	0.41%

**Tabl. 16** ▶ Popularity index of online searches for the GoogleCar

	2008	2009	2010	2011	2012	2013	2014	2015	2016
GoogleCar	34	44	51	61	69	92	100	96	94

**Tabl. 17** ▶ Popularity index of online searches for the Tesla brand (Base 100 = 2014)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Belgium	15	20	20	27	31	52	100	156	193
Germany	27	35	32	32	38	68	100	151	244
Spain	24	33	29	29	36	53	100	167	247
France	25	30	26	23	33	88	100	121	105
Italy	63	71	58	72	74	80	100	138	230
Poland	25	30	26	23	33	88	100	121	105
Portugal	38	57	46	39	56	78	100	176	321
United Kingdom	36	44	38	37	45	65	100	156	250
Japan	81	136	162	82	70	78	100	109	151
United States	32	32	32	32	43	92	100	113	162
Brazil	52	80	57	53	61	82	100	128	137
Mexico	40	58	56	53	63	82	100	126	202
Turkey	41	58	46	56	68	74	100	143	185
South Africa	95	97	78	71	76	115	100	192	198
China							100	100	129

**Tabl. 18** ▶ Worldwide sales of new passenger cars and light commercial vehicles between 2005 and 2015

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
EU (8 countries)	14.2	14.4	14.5	13.3	13.3	12.5	12.2	11.1	11.1	11.8	12.9
Japan	5.3	5.1	4.8	4.6	4.3	4.6	3.9	5	5	5.1	4.6
United States	16.9	16.5	16.1	13.2	10.4	11.5	12.7	14.4	15.5	16.4	17.4
Brazil	1.6	1.8	2.3	2.7	3	3.3	3.4	3.6	3.6	3.3	2.5
China	5.2	6.6	7.9	8.5	12.6	16.6	17.2	18.2	20.8	22.3	23.7

**Tabl. 19 ▶ If you intend to purchase a car in the next two years, do you plan to spend...**

One answer only - Excl. those not planning to buy a car

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
More than you spent on your current main vehicle?	39%	41%	51%	42%	47%	65%	51%	44%	48%	40%	75%	78%	68%	77%	72%	<b>57%</b>
The same as you spent on your current main vehicle?	48%	51%	38%	45%	42%	30%	34%	49%	47%	49%	21%	20%	28%	18%	20%	<b>35%</b>
Less than you spent on your current main vehicle?	13%	8%	11%	13%	12%	6%	15%	7%	6%	11%	4%	2%	4%	5%	8%	<b>8%</b>

**Tabl. 20 ▶ I would be prepared to spend more than is reasonable to buy myself a very nice car**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Agree	31%	39%	43%	29%	38%	62%	40%	42%	38%	36%	66%	93%	56%	71%	52%	<b>47%</b>
Disagree	69%	61%	57%	71%	62%	38%	60%	58%	62%	65%	35%	7%	44%	29%	48%	<b>53%</b>

**Tabl. 21 ▶ I may not own a car in the future**

%: sum of "agree somewhat" and "agree completely" - One answer only

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
I may not own a car in the future	73%	83%	79%	76%	78%	76%	81%	80%	66%	83%	83%	93%	83%	80%	88%	<b>80%</b>

**Tabl. 22 ▶ What are you planning to do with your main car in the next two years?**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
Keep it	53%	53%	43%	46%	44%	35%	66%	44%	55%	61%	16%	43%	27%	29%	45%	<b>44%</b>
Replace it with another car	33%	33%	46%	38%	45%	49%	27%	41%	20%	22%	76%	54%	67%	54%	47%	<b>43%</b>
Replace it with a motorised two/three-wheeler	3%	2%	1%	1%	1%	2%	0%	1%	0%	1%	1%	0%	2%	2%	0%	<b>1%</b>
Sell it without replacing it	1%	1%	0%	1%	1%	1%	0%	0%	1%	1%	2%	0%	1%	3%	1%	<b>1%</b>
Don't know	11%	11%	10%	14%	9%	14%	7%	14%	24%	16%	5%	3%	4%	12%	6%	<b>11%</b>

**Tabl. 23 ▶ I may not use a car in the future**

%: sum of "disagree somewhat" and "disagree completely" - One answer only

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
I may not use a car in the future	78%	84%	81%	80%	81%	79%	85%	82%	69%	85%	88%	94%	84%	84%	91%	<b>83%</b>

**Tabl. 24 ▶ In the months and years to come, are you planning to use your car...**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
More often than today	12%	13%	25%	13%	21%	22%	14%	12%	14%	13%	30%	41%	28%	34%	20%	<b>20%</b>
As often as today	78%	83%	72%	77%	73%	74%	81%	81%	76%	79%	57%	56%	60%	58%	64%	<b>72%</b>
Less often than today	11%	4%	4%	10%	6%	4%	5%	7%	10%	8%	13%	4%	12%	8%	16%	<b>8%</b>

**Tabl. 25 ▶ In your opinion, in ten years' time the role of cars in our society will be...**

	BE	DE	ES	FR	IT	PL	PT	UK	JP	US	BR	CN	MX	TR	ZA	15-country average
More important than today	20%	19%	28%	21%	23%	23%	20%	16%	18%	15%	32%	55%	39%	49%	34%	<b>27%</b>
As important as today	68%	67%	58%	61%	61%	66%	62%	70%	57%	70%	51%	32%	46%	40%	50%	<b>58%</b>
Less important than today	12%	14%	14%	19%	16%	10%	18%	13%	25%	15%	17%	13%	15%	11%	16%	<b>15%</b>

**Tabl. 26 ▶ Worldwide sales of new passenger cars and light commercial vehicles between 2005 and 2015; 2020 forecasts and average annual growth rate 2015-2020**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2020
EU (8 countries)	14.2	14.4	14.5	13.3	13.3	12.5	12.2	11.1	11.1	11.8	12.9	13.7
Japan	5.3	5.1	4.8	4.6	4.3	4.6	3.9	5	5	5.1	4.6	4.4
United States	16.9	16.5	16.1	13.2	10.4	11.5	12.7	14.4	15.5	16.4	17.4	17.9
Brazil	1.6	1.8	2.3	2.7	3	3.3	3.4	3.6	3.6	3.3	2.5	2.1
China	5.2	6.6	7.9	8.5	12.6	16.6	17.2	18.2	20.8	22.3	23.7	29.1