

APPENDIX



In your opinion, is your car an SUV?

	I don't know	No	Yes
South Africa	6%	70%	24%
Germany	7%	70%	22%
Belgium	12%	64%	24%
Brazil	18%	56%	26%
China	5%	34%	61%
Spain	25%	45%	31%
United States	3%	53%	44%
France	10%	65%	25%
Italy	4%	70%	25%
Japan	14%	64%	21%
Mexico	28%	35%	37%
Norway	13%	63%	24%
Netherlands	13%	65%	21%
Poland	8%	66%	26%
Portugal	14%	66%	20%
United Kingdom	8%	63%	30%
Turkey	27%	40%	33%
17-COUNTRY AVERAGE	13%	58%	29%

Do you agree or disagree with each of the following statements regarding your vehicle? (1/2)

Percentage of respondents who selected: Somewhat agree or Absolutely agree

	Your vehicle reflects your personality	You are attached to your car	Your vehicle's design makes it stand out from the rest	Your vehicle is comfortable for all occupants	Your vehicle is easy to drive and manoeuvre
South Africa	71%	96%	67%	93%	95%
Germany	63%	94%	55%	89%	95%
Belgium	66%	86%	57%	87%	95%
Brazil	78%	97%	67%	93%	96%
China	86%	93%	82%	91%	94%
Spain	71%	93%	72%	91%	94%
United States	78%	95%	70%	92%	96%
France	67%	82%	56%	87%	94%
Italy	78%	92%	67%	88%	96%
Japan	66%	88%	59%	78%	88%
Mexico	81%	96%	78%	95%	97%
Norway	63%	92%	48%	89%	95%
Netherlands	61%	88%	54%	89%	96%
Poland	68%	95%	57%	91%	95%
Portugal	73%	96%	57%	92%	95%
United Kingdom	68%	94%	56%	92%	92%
Turkey	74%	96%	76%	88%	92%
17-COUNTRY AVERAGE	71%	93%	63%	90%	94%

Do you agree or disagree with each of the following statements regarding your vehicle? (2/2)

Percentage of respondents who selected: Somewhat agree or Absolutely agree

	You feel safe in your vehicle	Your vehicle is spacious	Your vehicle features advanced technology	You see your vehicle purely as a means of transport	You could live without a vehicle
South Africa	95%	83%	68%	61%	44%
Germany	94%	72%	71%	73%	48%
Belgium	94%	75%	66%	84%	39%
Brazil	94%	83%	66%	67%	56%
China	92%	90%	86%	71%	74%
Spain	94%	87%	71%	68%	55%
United States	95%	83%	71%	69%	40%
France	94%	73%	64%	77%	35%
Italy	94%	79%	66%	59%	32%
Japan	91%	69%	62%	54%	40%
Mexico	95%	91%	76%	59%	61%
Norway	93%	81%	59%	78%	38%
Netherlands	96%	79%	61%	90%	43%
Poland	95%	83%	64%	74%	54%
Portugal	97%	84%	63%	74%	48%
United Kingdom	94%	81%	64%	73%	46%
Turkey	92%	84%	77%	59%	48%
17-COUNTRY AVERAGE	94%	81%	68%	70%	47%

What attributes do you believe the ideal car would have? Would it be...? (1/4)

	High-tech, ultra-connected or even autonomous	A car with a small environmental footprint	From a brand that inspires you	A car that enhances your image	As inexpensive as possible to buy and run
South Africa	9%	10%	8%	4%	12%
Germany	3%	11%	8%	1%	18%
Belgium	6%	10%	6%	4%	14%
Brazil	13%	5%	2%	1%	13%
China	15%	8%	6%	7%	13%
Spain	12%	15%	3%	2%	11%
United States	7%	7%	6%	4%	14%
France	7%	12%	4%	3%	19%
Italy	11%	18%	2%	1%	18%
Japan	6%	12%	4%	5%	19%
Mexico	16%	10%	3%	2%	11%
Norway	3%	8%	3%	2%	22%
Netherlands	5%	10%	5%	3%	14%
Poland	9%	8%	4%	2%	14%
Portugal	5%	13%	4%	2%	17%
United Kingdom	5%	11%	4%	5%	16%
Turkey	17%	9%	4%	3%	10%
17-COUNTRY AVERAGE	9%	10%	4%	3%	15%

What attributes do you believe the ideal car would have? Would it be...? (2/4)

	Practical for travelling around town	Pleasant to drive on both short and long journeys	A car in which you feel safe	As durable as possible	Powerful
South Africa	7%	23%	49%	13%	14%
Germany	10%	18%	48%	26%	13%
Belgium	10%	23%	39%	21%	7%
Brazil	8%	21%	51%	22%	12%
China	8%	13%	43%	22%	24%
Spain	9%	17%	53%	22%	9%
United States	9%	18%	48%	25%	14%
France	10%	26%	33%	20%	7%
Italy	10%	17%	52%	19%	8%
Japan	13%	14%	46%	18%	6%
Mexico	11%	17%	39%	20%	10%
Norway	8%	29%	46%	22%	7%
Netherlands	8%	21%	49%	17%	8%
Poland	14%	23%	43%	17%	6%
Portugal	7%	22%	49%	16%	2%
United Kingdom	9%	20%	49%	17%	7%
Turkey	13%	20%	50%	10%	16%
17-COUNTRY AVERAGE	10%	20%	46%	19%	10%

What attributes do you believe the ideal car would have? Would it be...? (3/4)

	Comfortable	Sporty	Family oriented, able to transport a few passengers	Practical, utilitarian	High-end
South Africa	27%	4%	20%	15%	2%
Germany	15%	10%	14%	17%	9%
Belgium	34%	9%	18%	20%	6%
Brazil	34%	3%	28%	14%	3%
China	27%	8%	20%	13%	7%
Spain	26%	3%	17%	19%	5%
United States	30%	11%	13%	17%	5%
France	33%	5%	15%	17%	5%
Italy	31%	6%	12%	21%	3%
Japan	21%	5%	10%	19%	4%
Mexico	27%	4%	33%	11%	6%
Norway	15%	4%	12%	24%	9%
Netherlands	28%	8%	12%	24%	3%
Poland	29%	5%	10%	25%	7%
Portugal	36%	3%	23%	21%	2%
United Kingdom	32%	6%	17%	17%	4%
Turkey	24%	9%	17%	12%	6%
17-COUNTRY AVERAGE	28%	6%	17%	18%	5%

What attributes do you believe the ideal car would have? Would it be...? (4/4)

	Suited to off-road use (dirt roads, mountains, steep terrain, etc.)	Fuel efficient	Attractively designed, visually appealing	Trendy	None of these
South Africa	11%	46%	11%	3%	1%
Germany	3%	34%	10%	5%	5%
Belgium	2%	29%	13%	4%	3%
Brazil	10%	48%	7%	0%	0%
China	7%	26%	13%	7%	1%
Spain	5%	36%	11%	7%	1%
United States	7%	27%	11%	6%	2%
France	4%	35%	11%	3%	4%
Italy	4%	34%	9%	5%	2%
Japan	3%	38%	15%	1%	6%
Mexico	4%	41%	16%	12%	1%
Norway	5%	38%	6%	2%	6%
Netherlands	1%	40%	15%	4%	3%
Poland	6%	47%	5%	4%	2%
Portugal	2%	49%	7%	5%	1%
United Kingdom	1%	31%	11%	6%	3%
Turkey	10%	41%	10%	4%	1%
17-COUNTRY AVERAGE	5%	38%	11%	5%	2%

Based on your own understanding, what attributes best characterise an SUV? What defines this kind of vehicle? (1/2)

	Raised, with a tall body	Fitted with 7 seats	Average sized	A large vehicle overall	A spacious interior	Easy to get into (particularly for children, seniors, the mobility impaired, etc.)
South Africa	41%	25%	12%	18%	48%	23%
Germany	45%	7%	13%	19%	26%	30%
Belgium	35%	8%	14%	25%	26%	20%
Brazil	24%	12%	14%	12%	46%	22%
China	41%	7%	17%	17%	50%	17%
Spain	26%	6%	22%	16%	37%	20%
United States	29%	14%	20%	18%	43%	31%
France	34%	10%	17%	25%	32%	19%
Italy	45%	15%	16%	30%	39%	18%
Japan	32%	6%	5%	14%	25%	17%
Mexico	14%	6%	24%	11%	37%	31%
Norway	34%	4%	16%	11%	19%	23%
Netherlands	37%	9%	14%	21%	28%	31%
Poland	7%	8%	27%	11%	26%	19%
Portugal	35%	9%	18%	19%	45%	18%
United Kingdom	34%	13%	12%	15%	27%	22%
Turkey	33%	5%	8%	17%	29%	16%
17-COUNTRY AVERAGE	32%	10%	16%	18%	34%	22%

**Based on your own understanding, what attributes best characterise an SUV?
What defines this kind of vehicle? (2/2)**

	Equipped with 4-wheel drive	Makes its occupants feel safe	An appealing design that you find attractive	A powerful engine	You don't know what an SUV is (single answer)
South Africa	31%	25%	17%	34%	2%
Germany	20%	24%	15%	25%	12%
Belgium	21%	30%	13%	18%	13%
Brazil	25%	35%	27%	31%	10%
China	25%	37%	29%	31%	4%
Spain	21%	34%	19%	25%	14%
United States	29%	35%	18%	21%	3%
France	21%	30%	15%	16%	13%
Italy	25%	34%	13%	19%	3%
Japan	30%	25%	15%	26%	19%
Mexico	18%	42%	31%	34%	10%
Norway	39%	26%	12%	23%	16%
Netherlands	15%	28%	12%	21%	17%
Poland	18%	37%	18%	17%	19%
Portugal	14%	32%	19%	11%	13%
United Kingdom	27%	22%	11%	16%	15%
Turkey	28%	35%	19%	31%	16%
17-COUNTRY AVERAGE	24%	31%	18%	23%	12%

If you consider these various attributes, do you believe that your car is an SUV?

	I don't know	No	Yes
South Africa	5%	66%	29%
Germany	6%	69%	25%
Belgium	14%	56%	29%
Brazil	11%	58%	31%
China	4%	31%	65%
Spain	20%	41%	39%
United States	4%	49%	46%
France	11%	62%	27%
Italy	4%	68%	27%
Japan	15%	61%	25%
Mexico	16%	35%	50%
Norway	16%	58%	25%
Netherlands	14%	60%	26%
Poland	16%	53%	31%
Portugal	15%	67%	18%
United Kingdom	9%	60%	31%
Turkey	18%	42%	40%
17-COUNTRY AVERAGE	12%	55%	33%

With which car brands do you most associate SUVs? (1/3)

In %.

	ZA	DE	BE	BR	CN	ES	USA	FR	IT	JP	MX	NOR	NL	PL	PT	RU	TUR	17-COUNTRY AVERAGE
Aiways		0	1		2			0					0					1
Alfa Romeo		2	1			3		2	5				3	2	2	1	3	2
Audi	20	23	19	9	19	16	5	14	14	9	14	13	14	12	12	12	13	14
BAIC					4													4
Baojun					6													6
BMW	35	35	23	16	22	18	13	18	27	11	15	17	22	22	24	17	21	21
Brilliance					4													4
Buick					12		4											8
BYD					18													18
Byton		0			3			1				0	0					1
Changan					10													10
Chery					4													4
Chevrolet	9	5	4	24	2	2	31	4	3	3	34	9	5	5	7	5	5	9
Chrysler	4			2			5			3	6							4
Citroen		2	7	6		8		12	2			0	2	2	5	10	4	5
Dacia		8	9			7		13	7				2	5	5	13	5	7
Daihatsu	1									2								2
Dodge	12			5			13			3	7	6						8
Dongfeng					5			0										3
DS	0	0	1	0	6	1		3	1	1		0	0	0	2	0		1
FAW					2													2
Fiat		0	2	10		2	0	2	5	1	1	1	0	2	2	2	4	2
Ford	16	6	9	12	10	13	32	6	9	4	24	8	8	8	8	12	11	12
Foton					2													2
GAC						1												1
Geely					4													4

With which car brands do you most associate SUVs? (2/3)

In %.

	ZA	DE	BE	BR	CN	ES	USA	FR	IT	JP	MX	NOR	NL	PL	PT	RU	TUR	17-COUNTRY AVERAGE
GM	2			3			6			6	4							4
GMC							16											16
Great Wall					5													5
Haima					2													2
Haval	11				6													8
Honda	4	2	4	24	6	7	16	3	6	16	25	6	2	11	5	6	10	9
Hongqi					2													2
Huansu					0													0
Hyundai	13	8	10	30	3	20	6	10	9	1	9	8	10	10	10	12	14	11
Infiniti	1			0	1		2			1	0							1
Isuzu	8	3	4	1	1	1	2	1	2	2	0	5	4	2	2	4	3	3
JAC					5						0							3
Jeep	37	25	28	34		13	24	14	46	21	16	20	30	26	21	25	25	25
Kia	4	3	6	3	2	9	5	5	5		12	4	5	9	6	7	7	6
Lancia		0	2			1		1	1				1	0	0	1	1	1
Landwind					1													1
Lucid			1		1		0	0				0	0					0
Lynk & Co		0	0		2	0		0	0				0					0
Leopaard					1													1
Lexus	3	1	2	0	3	4	3	2	2	5		2	3	5	1	3	1	3
Lifan					0													0
Maxus			0		1	1						0	0			0		0
Mazda	3	3	1		5	4	3	1	0	9		3	2	5	2	1	1	3
Mercedes-Benz	20	26	12	7	5	9	3	9	14	4	7	13	10	11	14	7	12	11
Mini	0	0	0	0	0	1	0	0	0	1	1	1	0	0	0	0	1	0
Mitsubishi	4	3	3	11	1	4	1	3	6	8	4	14	7	6	7	9	3	6
MG	0	0	0		2	0		0	0		0	1	0		0	1	0	0

With which car brands do you most associate SUVs? (3/3)

In %.

	ZA	DE	BE	BR	CN	ES	USA	FR	IT	JP	MX	NOR	NL	PL	PT	RU	TUR	17-COUNTRY AVERAGE
NIO		0			0							0	0					0
Nissan	6	5	8	8	2	18	8	10	16	15	22	8	8	11	19	9	18	11
Opel	1	3	3			4		3	3			2	3	4	3	0	3	3
Peugeot		0	7	4		9		21	5		4	2	5	2	12	1	7	6
Porsche	5	5	4	1	1	2	2	2	3	1	2	2	3	3	2	2	5	3
Renault	3	2	3	10		8	0	17	4		3	1	4	3	11	2	2	5
Roewe					0													0
Seres					1													1
Seat		1	0	0		6		1	0		1	0	0	1	3	1	1	1
Skoda		2	2		0	2		2	2			3	2	4	2	2	2	2
Smart		0	0	0	1	0	0	0	0		1		0	0	1	1	0	0
Soueast					0													0
Subaru	3	2	0	2	1	1	10	1	4	9	1	7	2	4	2	4	2	3
Suzuki	3	2	3		1	5	1	2	9	4		7	2	5	3	5	4	4
Tesla	1	1	1	1	0	1	2	1	1	1	2	2	2	0	1	1	1	1
Toyota	26	5	7	20	10	16	19	11	17	35	18	21	9	18	8	7	13	15
Vauxhall																6		6
Venucia					1													1
Volkswagen	11	12	11	14	3	7	2	9	7	3	14	8	11	9	8	8	15	9
Volvo	3	4	7	7	4	4	2	2	4	4	1		7	8	9	5	9	5
Wuling					1													1
Xpeng					1							0						0
Zhonghua					1													1
Zotye					0													0
Other	2	10	9	2	8	9	2	11	4	16	3	15	12	8	9	16	6	8

Do you consider SUVs to be... (1/3)

	High-tech, ultra-connected or even autonomous	A car with a small environmental footprint	From a brand that inspires you	A car that enhances your image	As inexpensive as possible to buy and run	Practical for travelling around town
South Africa	10%	2%	5%	4%	2%	6%
Germany	5%	3%	4%	5%	4%	5%
Belgium	8%	4%	3%	3%	4%	3%
Brazil	18%	2%	3%	3%	3%	5%
China	10%	6%	6%	7%	10%	11%
Spain	13%	8%	2%	4%	3%	7%
United States	6%	3%	5%	4%	7%	11%
France	7%	3%	3%	3%	4%	5%
Italy	11%	5%	3%	5%	4%	5%
Japan	7%	4%	2%	4%	3%	6%
Mexico	16%	5%	3%	3%	4%	12%
Norway	4%	4%	3%	2%	3%	3%
Netherlands	7%	3%	3%	3%	2%	2%
Poland	10%	4%	3%	4%	3%	9%
Portugal	9%	5%	2%	2%	3%	6%
United Kingdom	6%	3%	3%	5%	3%	3%
Turkey	12%	5%	5%	6%	5%	8%
17-COUNTRY AVERAGE	9%	4%	3%	4%	4%	6%

Do you consider SUVs to be... (2/3)

	Pleasant to drive on both short and long journeys	A car in which you feel safe	As durable as possible	Powerful	Comfortable	Sporty	Family oriented, able to transport a few passengers
South Africa	24%	26%	9%	25%	28%	13%	48%
Germany	13%	21%	6%	33%	21%	9%	23%
Belgium	13%	25%	8%	22%	23%	11%	27%
Brazil	23%	27%	9%	22%	33%	16%	31%
China	16%	28%	20%	22%	17%	18%	22%
Spain	15%	29%	9%	20%	19%	7%	24%
United States	17%	35%	11%	16%	30%	8%	29%
France	15%	23%	6%	14%	26%	6%	26%
Italy	8%	35%	6%	22%	28%	13%	29%
Japan	10%	14%	6%	34%	13%	14%	13%
Mexico	17%	26%	10%	22%	25%	13%	40%
Norway	19%	25%	4%	33%	12%	9%	20%
Netherlands	15%	27%	5%	31%	22%	10%	33%
Poland	13%	17%	22%	28%	23%	5%	23%
Portugal	18%	26%	6%	15%	31%	10%	41%
United Kingdom	15%	21%	7%	19%	20%	7%	29%
Turkey	14%	38%	11%	29%	25%	12%	15%
17-COUNTRY AVERAGE	16%	26%	9%	24%	23%	11%	28%

Do you consider SUVs to be... (3/3)

	Practical, utilitarian	High-end	Suited to off-road use (dirt roads, mountains, steep terrain, etc.)	Fuel efficient	Attractively designed, visually appealing	Trendy	None of these (single answer)
South Africa	13%	7%	35%	6%	11%	7%	3%
Germany	12%	10%	35%	4%	6%	6%	12%
Belgium	16%	11%	22%	5%	8%	12%	9%
Brazil	11%	23%	24%	5%	16%	6%	2%
China	15%	5%	21%	10%	10%	7%	7%
Spain	16%	9%	29%	10%	15%	12%	7%
United States	20%	6%	16%	8%	8%	8%	10%
France	19%	13%	18%	6%	12%	18%	12%
Italy	12%	17%	41%	4%	12%	7%	3%
Japan	19%	6%	38%	7%	9%	8%	14%
Mexico	12%	11%	16%	13%	19%	16%	2%
Norway	23%	9%	32%	4%	5%	3%	17%
Netherlands	19%	7%	23%	5%	8%	6%	11%
Poland	20%	13%	29%	6%	7%	10%	5%
Portugal	18%	5%	23%	8%	10%	11%	6%
United Kingdom	18%	7%	23%	7%	6%	9%	15%
Turkey	10%	13%	28%	10%	11%	9%	4%
17-COUNTRY AVERAGE	16%	10%	27%	7%	10%	9%	8%

Do you believe that SUVs offer good value for money?

	No, not at all	No, not really	Yes, somewhat	Yes, absolutely	Sub-Total Yes
South Africa	1%	6%	31%	62%	93%
Germany	16%	33%	33%	17%	51%
Belgium	11%	32%	44%	13%	57%
Brazil	5%	17%	40%	38%	78%
China	2%	10%	61%	28%	89%
Spain	5%	21%	49%	24%	74%
United States	3%	13%	42%	42%	84%
France	14%	30%	42%	13%	55%
Italy	4%	33%	49%	14%	63%
Japan	8%	21%	57%	14%	71%
Mexico	2%	8%	48%	42%	90%
Norway	9%	23%	44%	24%	68%
Netherlands	9%	31%	47%	13%	60%
Poland	2%	13%	59%	26%	85%
Portugal	8%	28%	45%	19%	64%
United Kingdom	14%	28%	41%	17%	58%
Turkey	3%	11%	43%	42%	85%
17-COUNTRY AVERAGE	7%	21%	46%	26%	72%

Which of the following criteria most influenced your choice of vehicle? (1/3)

	Purchase price	Usage costs (fuel consumption, maintenance, insurance, etc.)	Comfort	Brand image	Looks, interior/ exterior design	Performance (dynamism, power, road holding, etc.)	The feeling of safety and being protected
South Africa	35%	39%	33%	11%	7%	28%	27%
Germany	44%	25%	15%	6%	16%	17%	25%
Belgium	45%	24%	25%	11%	12%	12%	22%
Brazil	42%	40%	31%	8%	8%	15%	23%
China	11%	20%	24%	12%	17%	22%	43%
Spain	37%	21%	28%	6%	17%	18%	27%
United States	31%	28%	27%	10%	9%	20%	27%
France	43%	27%	32%	10%	15%	13%	21%
Italy	30%	31%	23%	6%	11%	14%	29%
Japan	40%	30%	28%	8%	19%	14%	35%
Mexico	30%	29%	36%	10%	22%	22%	27%
Norway	44%	33%	28%	8%	9%	11%	26%
Netherlands	43%	31%	30%	8%	6%	16%	23%
Poland	40%	35%	21%	6%	12%	15%	28%
Portugal	50%	31%	33%	9%	14%	15%	23%
United Kingdom	39%	36%	31%	7%	8%	12%	23%
Turkey	21%	26%	21%	10%	14%	26%	31%
17-COUNTRY AVERAGE	37%	30%	27%	9%	13%	17%	27%

Which of the following criteria most influenced your choice of vehicle? (2/3)

	Sportiness	Interior space that allows you to transport a few passengers or your family	Interior space with the capacity to transport bulky items	All-terrain/off-road ability	Towing/pulling capacity	Robustness and reliability
South Africa	9%	20%	10%	11%	5%	15%
Germany	12%	17%	13%	3%	3%	27%
Belgium	10%	13%	15%	6%	6%	20%
Brazil	10%	19%	15%	8%	6%	15%
China	16%	19%	11%	10%	9%	24%
Spain	4%	20%	10%	8%	3%	27%
United States	11%	17%	13%	10%	9%	28%
France	5%	15%	14%	5%	4%	24%
Italy	8%	17%	15%	10%	5%	32%
Japan	9%	12%	9%	6%	3%	27%
Mexico	7%	27%	9%	9%	2%	14%
Norway	5%	11%	11%	7%	5%	24%
Netherlands	8%	14%	11%	5%	6%	23%
Poland	4%	14%	11%	14%	5%	28%
Portugal	5%	19%	9%	4%	4%	21%
United Kingdom	5%	14%	13%	7%	5%	19%
Turkey	11%	15%	10%	14%	13%	33%
17-COUNTRY AVERAGE	8%	17%	12%	8%	6%	24%

Which of the following criteria most influenced your choice of vehicle? (3/3)

	Accessibility (ease of access, particularly for children, seniors, the mobility impaired, etc.)	Suitability for use in town	Minimising environmental impact	Estimated resale value	Standing out from the crowd, owning a vehicle that is different
South Africa	9%	12%	7%	7%	5%
Germany	9%	12%	14%	6%	5%
Belgium	10%	12%	7%	7%	6%
Brazil	10%	15%	6%	12%	2%
China	17%	8%	8%	7%	12%
Spain	11%	17%	9%	4%	9%
United States	12%	5%	7%	8%	6%
France	10%	12%	8%	5%	6%
Italy	7%	17%	13%	5%	7%
Japan	4%	9%	8%	2%	5%
Mexico	12%	15%	6%	7%	7%
Norway	18%	6%	9%	4%	2%
Netherlands	11%	14%	7%	4%	6%
Poland	7%	15%	10%	6%	3%
Portugal	8%	13%	9%	4%	5%
United Kingdom	13%	10%	12%	5%	6%
Turkey	8%	15%	4%	10%	7%
17-COUNTRY AVERAGE	10%	12%	8%	6%	6%

You have stated that you own an SUV. Did you consider buying another type of vehicle?

	No	Yes
South Africa	36%	64%
Germany	54%	46%
Belgium	59%	41%
Brazil	41%	59%
China	37%	63%
Spain	54%	46%
United States	48%	52%
France	62%	38%
Italy	61%	39%
Japan	38%	62%
Mexico	40%	60%
Norway	55%	45%
Netherlands	66%	34%
Poland	29%	71%
Portugal	44%	56%
United Kingdom	50%	50%
Turkey	34%	66%
17-COUNTRY AVERAGE	48%	52%

What factors caused you to hesitate before choosing between the SUV you purchased and another type of vehicle? Regarding the SUV... (1/2)

	You thought it was expensive	You were concerned about its environmental impact	You were concerned about the safety of other road users	Estimated resale value	You were concerned about the vehicle's practicality, particularly in town
South Africa	45%	26%	27%	16%	30%
Germany	25%	24%	21%	20%	22%
Belgium	18%	25%	18%	15%	13%
Brazil	40%	24%	23%	18%	29%
China	24%	25%	30%	28%	33%
Spain	29%	19%	17%	13%	33%
United States	22%	29%	23%	20%	23%
France	31%	25%	22%	19%	28%
Italy	40%	14%	13%	21%	18%
Japan	23%	15%	25%	17%	28%
Mexico	31%	25%	23%	17%	31%
Norway	29%	26%	15%	18%	10%
Netherlands	31%	30%	27%	19%	15%
Poland	40%	26%	21%	12%	21%
Portugal	45%	21%	20%	20%	27%
United Kingdom	25%	17%	10%	31%	22%
Turkey	42%	24%	20%	24%	26%
17-COUNTRY AVERAGE	32%	23%	21%	19%	24%

What factors caused you to hesitate before choosing between the SUV you purchased and another type of vehicle? Regarding the SUV... (2/2)

	You were concerned about its size	You were unsure about the vehicle's looks, trim and options	You were concerned about its fuel consumption	For another reason (single answer)
South Africa	30%	15%	60%	0%
Germany	19%	29%	25%	6%
Belgium	27%	28%	31%	2%
Brazil	34%	18%	39%	6%
China	25%	33%	51%	2%
Spain	35%	16%	38%	7%
United States	28%	23%	31%	10%
France	26%	23%	27%	6%
Italy	37%	19%	40%	2%
Japan	23%	22%	22%	6%
Mexico	35%	32%	47%	1%
Norway	32%	5%	17%	13%
Netherlands	34%	17%	20%	10%
Poland	25%	18%	33%	3%
Portugal	30%	18%	27%	11%
United Kingdom	21%	21%	23%	10%
Turkey	20%	18%	38%	7%
17-COUNTRY AVERAGE	28%	21%	34%	6%

Why did you decide not to buy an SUV? (1/2)

	You didn't want to spend that much money on a car	You couldn't afford it / didn't have the budget	You didn't feel that this type of vehicle suited your needs in terms of usage	You felt that it had too much of an environmental impact	You felt that the cost of using this type of vehicle was too high (fuel consumption, maintenance, insurance, etc.)	You were not offered the chance to buy an SUV
South Africa	34%	56%	22%	6%	38%	11%
Germany	30%	22%	32%	16%	29%	7%
Belgium	27%	32%	21%	14%	22%	12%
Brazil	35%	56%	13%	2%	36%	17%
China	17%	25%	16%	13%	36%	12%
Spain	21%	20%	24%	9%	19%	13%
United States	24%	34%	30%	10%	32%	10%
France	28%	36%	23%	19%	23%	7%
Italy	32%	29%	22%	9%	16%	7%
Japan	23%	18%	41%	7%	26%	7%
Mexico	26%	40%	27%	7%	29%	17%
Norway	29%	32%	17%	5%	29%	5%
Netherlands	34%	33%	11%	10%	35%	4%
Poland	24%	39%	14%	8%	24%	5%
Portugal	40%	37%	21%	4%	20%	12%
United Kingdom	25%	27%	29%	17%	25%	7%
Turkey	29%	52%	13%	10%	36%	11%
17-COUNTRY AVERAGE	28%	35%	22%	10%	28%	10%

Why did you decide not to buy an SUV? (1/2)

	You took advantage of a promotional offer on another vehicle	You wanted to buy a vehicle with a combustion engine, so you chose a small vehicle that is exempt from ecotaxes	You don't like the design of SUVs	You felt that an SUV would be too bulky, especially for use in town	When you were seeking to buy a vehicle, these models were not available within the desired time frame	For none of these reasons (single answer)
South Africa	21%	5%	6%	13%	8%	6%
Germany	8%	2%	12%	32%	7%	13%
Belgium	8%	4%	12%	28%	8%	11%
Brazil	25%	2%	1%	8%	7%	4%
China	6%	6%	18%	33%	15%	5%
Spain	16%	3%	11%	20%	14%	9%
United States	8%	5%	12%	17%	10%	10%
France	9%	4%	13%	26%	7%	9%
Italy	12%	5%	11%	31%	6%	6%
Japan	3%	3%	22%	33%	7%	9%
Mexico	25%	4%	9%	22%	14%	4%
Norway	5%	5%	10%	11%	8%	23%
Netherlands	3%	3%	11%	21%	7%	13%
Poland	9%	3%	7%	20%	5%	9%
Portugal	7%	3%	12%	20%	8%	6%
United Kingdom	6%	4%	16%	25%	4%	11%
Turkey	7%	3%	4%	27%	6%	5%
17-COUNTRY AVERAGE	10%	4%	11%	23%	8%	9%

How often do you use your vehicle?

Percentage of respondents who selected: Often or Always

	For daily journeys, such as commuting to work	For private journeys and leisure (food and other shopping, sporting activities, etc.)	For occasional trips, such as weekends away or holidays
South Africa	79%	78%	61%
Germany	60%	71%	50%
Belgium	68%	75%	59%
Brazil	74%	80%	67%
China	78%	59%	53%
Spain	69%	75%	73%
United States	76%	77%	64%
France	65%	79%	71%
Italy	73%	76%	70%
Japan	52%	57%	56%
Mexico	89%	86%	66%
Norway	53%	56%	40%
Netherlands	57%	64%	43%
Poland	73%	70%	73%
Portugal	79%	82%	69%
United Kingdom	56%	72%	47%
Turkey	78%	80%	75%
17-COUNTRY AVERAGE	69%	73%	61%

How many kilometres do you estimate that you cover in your vehicle per year?

	Between 10,000 and 15,000 km	Between 15,000 and 20,000 km	Between 20,000 and 25,000 km	Between 25,000 and 30,000 km	Between 5,000 and 10,000 km	Less than 5,000 km	More than 30,000 km
South Africa	17%	18%	8%	7%	24%	15%	11%
Germany	24%	17%	9%	4%	31%	13%	2%
Belgium	25%	19%	10%	6%	28%	9%	3%
Brazil	20%	17%	12%	8%	21%	10%	13%
China	32%	24%	9%	3%	20%	8%	3%
Spain	23%	19%	8%	5%	27%	13%	4%
United States	21%	20%	13%	6%	20%	13%	8%
France	24%	17%	9%	4%	28%	13%	4%
Italy	27%	19%	10%	6%	22%	8%	8%
Japan	19%	13%	5%	4%	30%	24%	4%
Mexico	20%	20%	12%	10%	21%	11%	6%
Norway	30%	16%	7%	3%	31%	11%	3%
Netherlands	25%	17%	10%	5%	30%	10%	3%
Poland	21%	19%	12%	6%	26%	12%	3%
Portugal	26%	12%	5%	5%	30%	16%	6%
United Kingdom	23%	17%	7%	2%	29%	20%	2%
Turkey	23%	18%	11%	7%	23%	9%	10%
17-COUNTRY AVERAGE	24%	18%	9%	5%	26%	13%	5%

How do you use your vehicle?

	Both in an urban environment and in more rural areas	Mostly in town	Mostly in rural areas	Almost exclusively in town, in an urban environment	Almost exclusively in rural areas
South Africa	37%	27%	2%	34%	0%
Germany	54%	19%	8%	16%	3%
Belgium	64%	14%	10%	11%	2%
Brazil	16%	38%	1%	45%	0%
China	24%	37%	3%	36%	0%
Spain	49%	26%	6%	18%	1%
United States	39%	23%	7%	30%	1%
France	50%	19%	14%	14%	4%
Italy	43%	32%	5%	17%	2%
Japan	30%	27%	4%	37%	2%
Mexico	26%	33%	1%	40%	0%
Norway	48%	22%	13%	10%	7%
Netherlands	63%	13%	9%	14%	1%
Poland	55%	27%	4%	13%	1%
Portugal	37%	36%	3%	24%	1%
United Kingdom	47%	25%	8%	18%	1%
Turkey	35%	36%	1%	27%	0%
17-COUNTRY AVERAGE	42%	27%	6%	24%	2%

Do you use your vehicle for the following purposes?

Percentage of respondents who selected: More or less every day or 2-3 times a week

	Travelling with several friends, with your family	Transporting bulky items	Driving off road, on rough trails	For towing or pulling
South Africa	59%	19%	18%	10%
Germany	31%	17%	15%	13%
Belgium	38%	23%	20%	19%
Brazil	63%	24%	17%	11%
China	47%	20%	16%	16%
Spain	56%	19%	26%	13%
United States	40%	30%	26%	23%
France	33%	18%	18%	16%
Italy	48%	15%	17%	15%
Japan	40%	20%	13%	13%
Mexico	76%	18%	22%	14%
Norway	43%	19%	17%	17%
Netherlands	43%	14%	11%	14%
Poland	57%	20%	25%	17%
Portugal	50%	15%	14%	7%
United Kingdom	39%	22%	21%	19%
Turkey	64%	27%	26%	25%
17-COUNTRY AVERAGE	49%	20%	19%	15%

In your opinion, does your car pollute?

	I don't know	No, not at all	No, not really	Yes, very	Yes, somewhat	Sub-Total Yes
South Africa	4%	6%	28%	11%	50%	61%
Germany	6%	6%	23%	10%	55%	65%
Belgium	10%	10%	45%	5%	31%	36%
Brazil	4%	5%	38%	8%	45%	53%
China	1%	4%	19%	10%	66%	76%
Spain	5%	6%	29%	10%	51%	61%
United States	10%	12%	27%	12%	38%	51%
France	11%	12%	49%	4%	25%	28%
Italy	6%	4%	43%	6%	42%	48%
Japan	12%	10%	31%	7%	39%	46%
Mexico	1%	19%	40%	3%	37%	40%
Norway	7%	3%	23%	7%	60%	67%
Netherlands	7%	12%	35%	6%	41%	47%
Poland	8%	5%	21%	10%	57%	66%
Portugal	5%	8%	31%	6%	50%	56%
United Kingdom	11%	6%	25%	7%	50%	57%
Turkey	4%	8%	57%	9%	22%	31%
17-COUNTRY AVERAGE	7%	8%	33%	8%	45%	52%

Compared to other types of vehicle, do you think that SUVs pollute...?

	More	Less	Neither more nor less
South Africa	37%	24%	40%
Germany	54%	25%	21%
Belgium	41%	19%	40%
Brazil	17%	37%	47%
China	31%	28%	41%
Spain	24%	31%	45%
United States	36%	21%	43%
France	42%	16%	42%
Italy	35%	14%	51%
Japan	25%	29%	46%
Mexico	14%	44%	42%
Norway	35%	14%	51%
Netherlands	45%	15%	40%
Poland	24%	23%	52%
Portugal	26%	22%	52%
United Kingdom	48%	11%	41%
Turkey	20%	36%	43%
17-COUNTRY AVERAGE	33%	24%	43%

You do not own an SUV. In your opinion, for what reasons do some people buy SUVs? (1/2)

	They are not concerned about the environmental impact	They believed that the advantages these vehicles provide counterbalance their environmental impact	No other type of vehicle met their requirements (practical, family oriented, etc.)	They want to stand out
South Africa	11%	47%	58%	49%
Germany	26%	25%	30%	41%
Belgium	24%	22%	21%	32%
Brazil	7%	24%	49%	37%
China	21%	29%	48%	25%
Spain	9%	35%	31%	26%
United States	19%	34%	54%	18%
France	26%	19%	29%	28%
Italy	15%	27%	37%	36%
Japan	11%	14%	41%	21%
Mexico	13%	39%	39%	24%
Norway	13%	26%	38%	21%
Netherlands	16%	35%	25%	36%
Poland	19%	26%	38%	51%
Portugal	11%	25%	30%	32%
United Kingdom	27%	33%	32%	43%
Turkey	19%	29%	27%	54%
17-COUNTRY AVERAGE	17%	29%	37%	34%

You do not own an SUV. In your opinion, for what reasons do some people buy SUVs? (2/2)

	They are following a trend	There was a limited choice of alternative body styles	They were attracted by the accessibility of this type of vehicle (especially for seniors, people with impaired mobility, etc.)	Other
South Africa	38%	8%	35%	4%
Germany	51%	5%	26%	11%
Belgium	49%	10%	21%	7%
Brazil	50%	9%	28%	10%
China	33%	18%	38%	1%
Spain	42%	7%	28%	9%
United States	27%	12%	34%	10%
France	50%	5%	17%	7%
Italy	41%	4%	21%	6%
Japan	37%	12%	20%	14%
Mexico	35%	14%	44%	6%
Norway	40%	6%	31%	16%
Netherlands	38%	2%	26%	17%
Poland	45%	8%	9%	7%
Portugal	61%	6%	20%	11%
United Kingdom	50%	6%	15%	4%
Turkey	47%	18%	13%	6%
17-COUNTRY AVERAGE	43%	9%	25%	9%

Do you believe that by offering hybrid or electric SUVs, carmakers...

Percentage of respondents who selected: Yes, somewhat or Yes, absolutely

	Are seeking to ease their environmental conscience	Are meeting the expectations of motorists	Are preparing for the future (traffic restrictions in cities, carbon neutrality targets, gradual phasing out of combustion vehicles)	Use this kind of technology to meet the environmental targets set for them	Are using them as an excuse to raise prices
South Africa	82%	80%	91%	90%	77%
Germany	74%	64%	76%	76%	79%
Belgium	78%	69%	78%	75%	82%
Brazil	81%	86%	90%	88%	85%
China	76%	85%	88%	83%	68%
Spain	80%	60%	88%	85%	81%
United States	76%	76%	81%	81%	77%
France	82%	75%	76%	79%	84%
Italy	71%	81%	85%	81%	74%
Japan	80%	79%	81%	81%	69%
Mexico	76%	92%	89%	89%	75%
Norway	68%	75%	74%	76%	80%
Netherlands	68%	76%	79%	80%	74%
Poland	84%	87%	91%	89%	87%
Portugal	69%	79%	82%	80%	87%
United Kingdom	72%	69%	76%	81%	82%
Turkey	80%	86%	89%	88%	72%
17-COUNTRY AVERAGE	76%	78%	83%	82%	79%

Do you believe that producing electric or hybrid SUVs reduces their environmental impact?

	No, not at all	No, not really	Yes, somewhat	Yes, absolutely
South Africa	2%	11%	42%	46%
Germany	11%	32%	36%	21%
Belgium	11%	31%	43%	16%
Brazil	1%	7%	37%	55%
China	1%	11%	61%	27%
Spain	3%	15%	52%	30%
United States	7%	15%	42%	37%
France	13%	27%	44%	15%
Italy	3%	16%	53%	28%
Japan	6%	15%	61%	19%
Mexico	2%	7%	46%	45%
Norway	12%	23%	45%	20%
Netherlands	10%	28%	44%	18%
Poland	3%	7%	56%	35%
Portugal	6%	13%	42%	39%
United Kingdom	8%	22%	49%	21%
Turkey	3%	9%	44%	45%
17-COUNTRY AVERAGE	6%	17%	47%	30%

Which of the following two types of vehicle do you believe is more environmentally friendly?

	A fully electric SUV	A city car or small saloon with a combustion engine
South Africa	82%	18%
Germany	47%	53%
Belgium	56%	44%
Brazil	90%	10%
China	81%	19%
Spain	84%	16%
United States	61%	39%
France	51%	49%
Italy	69%	31%
Japan	75%	25%
Mexico	87%	13%
Norway	59%	41%
Netherlands	60%	40%
Poland	74%	26%
Portugal	83%	17%
United Kingdom	64%	36%
Turkey	87%	13%
17-COUNTRY AVERAGE	71%	29%

**SUVs are the target of all kinds of criticism (environmental impact, size, hazard posed to pedestrians, etc.).
Would you say that these criticisms are justified?**

	Completely unjustified	Somewhat unjustified	Somewhat justified	Completely justified	Sub-total Justified
South Africa	11%	27%	49%	13%	62%
Germany	10%	14%	46%	30%	76%
Belgium	8%	27%	49%	16%	65%
Brazil	18%	22%	46%	14%	60%
China	4%	32%	52%	12%	64%
Spain	8%	38%	42%	11%	53%
United States	12%	29%	36%	22%	59%
France	9%	27%	46%	18%	64%
Italy	5%	27%	55%	13%	68%
Japan	6%	32%	55%	7%	62%
Mexico	9%	41%	40%	11%	51%
Norway	12%	28%	45%	15%	60%
Netherlands	6%	25%	52%	17%	69%
Poland	7%	38%	44%	12%	56%
Portugal	12%	29%	48%	11%	59%
United Kingdom	6%	18%	52%	24%	75%
Turkey	12%	31%	38%	19%	57%
17-COUNTRY AVERAGE	9%	29%	47%	16%	62%

Do you think sales of SUVs should be restricted in the future?

	No, not at all	No, not really	Yes, somewhat	Yes, absolutely	Sub-Total Yes
South Africa	26%	44%	19%	11%	30%
Germany	21%	29%	27%	23%	50%
Belgium	16%	40%	31%	13%	43%
Brazil	37%	40%	16%	7%	23%
China	17%	47%	29%	7%	36%
Spain	23%	37%	32%	8%	40%
United States	31%	34%	18%	17%	35%
France	14%	35%	35%	17%	52%
Italy	19%	43%	31%	7%	38%
Japan	15%	50%	28%	7%	35%
Mexico	27%	44%	24%	5%	29%
Norway	22%	44%	22%	11%	33%
Netherlands	13%	43%	32%	12%	44%
Poland	16%	41%	33%	10%	43%
Portugal	20%	48%	23%	9%	32%
United Kingdom	13%	32%	36%	20%	55%
Turkey	19%	51%	17%	13%	30%
17-COUNTRY AVERAGE	20%	41%	27%	12%	38%

Do you support or oppose each of the following measures with regard to SUVs?

Percentage of respondents who selected: Somewhat support or Absolutely support

	An ecotax on combustion vehicles	A tax on the heaviest vehicles	A ban on SUVs in cities and town centres	A ban on advertising for this type of vehicle	Higher parking charges for these vehicles	A speed limit for these vehicles
South Africa	56%	43%	26%	22%	37%	58%
Germany	47%	52%	44%	37%	45%	48%
Belgium	48%	54%	50%	42%	43%	55%
Brazil	58%	38%	22%	22%	31%	57%
China	58%	55%	41%	39%	47%	69%
Spain	58%	48%	41%	33%	38%	55%
United States	44%	40%	34%	31%	39%	47%
France	51%	59%	52%	44%	43%	54%
Italy	60%	53%	45%	32%	45%	60%
Japan	52%	56%	42%	35%	46%	52%
Mexico	58%	49%	34%	29%	31%	65%
Norway	45%	48%	35%	29%	32%	38%
Netherlands	41%	46%	47%	36%	43%	51%
Poland	44%	38%	37%	32%	35%	50%
Portugal	63%	47%	35%	28%	34%	58%
United Kingdom	60%	63%	53%	45%	51%	60%
Turkey	49%	35%	34%	32%	37%	65%
17-COUNTRY AVERAGE	52%	48%	39%	33%	40%	56%

If you were to purchase a car in the next 12 months, what type of vehicle would you buy?

	4x4	Saloon car	Estate	City car	Coupé / Convertible	SUV	Sports car	You don't know
South Africa	17%	5%	1%	13%	5%	35%	13%	10%
Germany	4%	14%	11%	22%	5%	19%	6%	19%
Belgium	7%	13%	12%	22%	3%	17%	5%	20%
Brazil	13%	19%	2%	9%	1%	42%	8%	7%
China	6%	28%	4%	7%	3%	44%	2%	7%
Spain	6%	12%	11%	17%	2%	27%	6%	20%
United States	7%	23%	1%	6%	3%	38%	8%	15%
France	5%	17%	5%	25%	3%	20%	6%	19%
Italy	6%	16%	8%	20%	4%	25%	6%	15%
Japan	5%	9%	12%	11%	4%	14%	4%	40%
Mexico	8%	22%	5%	13%	2%	37%	5%	8%
Norway	10%	11%	12%	9%	4%	22%	5%	28%
Netherlands	2%	15%	7%	25%	3%	17%	5%	26%
Poland	7%	13%	12%	24%	3%	17%	6%	18%
Portugal	6%	21%	9%	17%	2%	21%	10%	15%
United Kingdom	6%	15%	8%	18%	4%	18%	7%	24%
Turkey	14%	17%	2%	12%	3%	31%	12%	9%
17-COUNTRY AVERAGE	7%	16%	7%	16%	3%	26%	7%	18%

Do you think you might buy a hybrid or electric vehicle?

	Yes	No	You don't know
South Africa	71%	15%	13%
Germany	43%	35%	23%
Belgium	37%	30%	33%
Brazil	77%	6%	16%
China	78%	12%	10%
Spain	64%	9%	27%
United States	53%	30%	17%
France	35%	31%	34%
Italy	76%	10%	14%
Japan	45%	22%	33%
Mexico	72%	10%	18%
Norway	54%	26%	20%
Netherlands	50%	25%	25%
Poland	49%	22%	29%
Portugal	69%	13%	18%
United Kingdom	57%	23%	20%
Turkey	75%	9%	16%
17-COUNTRY AVERAGE	59%	19%	22%

In your opinion, do you think carmakers should offer, more, fewer or neither more nor fewer...?

Percentage of respondents who selected: More

	SUVs	Vehicles with other body styles (saloons, city cars, etc.)
South Africa	44%	48%
Germany	21%	35%
Belgium	26%	39%
Brazil	54%	44%
China	51%	31%
Spain	32%	31%
United States	37%	35%
France	23%	40%
Italy	28%	41%
Japan	24%	30%
Mexico	47%	38%
Norway	27%	29%
Netherlands	24%	35%
Poland	26%	33%
Portugal	45%	55%
United Kingdom	22%	34%
Turkey	58%	43%
17-COUNTRY AVERAGE	35%	38%

Do you think that restrictions, regulations and taxes will eventually deter buyers from choosing SUVs?

	No, definitely not	No, probably not	Yes, probably	Yes, definitely	Sub-Total Yes
South Africa	5%	24%	46%	24%	70%
Germany	9%	41%	34%	17%	51%
Belgium	7%	37%	41%	14%	55%
Brazil	6%	23%	52%	19%	71%
China	5%	22%	56%	17%	72%
Spain	6%	31%	51%	12%	63%
United States	10%	31%	35%	25%	59%
France	7%	30%	46%	16%	62%
Italy	6%	27%	53%	14%	67%
Japan	5%	32%	51%	12%	63%
Mexico	7%	18%	54%	21%	75%
Norway	10%	41%	37%	11%	49%
Netherlands	6%	36%	44%	13%	57%
Poland	4%	32%	51%	13%	64%
Portugal	3%	25%	56%	17%	72%
United Kingdom	7%	30%	44%	19%	63%
Turkey	6%	33%	39%	23%	62%
17-COUNTRY AVERAGE	6%	30%	46%	17%	63%