

AUTO 2023

APPENDICES



How is your car powered?

To those who have at least one car in their household. One answer only.

	Subtotal Petrol or Diesel	Petrol	Diesel	Subtotal Electric or Hybrid	Electric	Hybride non- rechargeable	Hybrid, rechargeable	Other
Germany	89%	63%	26%	10%	5%	3%	2%	1%
Austria	92%	49%	43%	8%	4%	3%	1%	0%
Belgium	91%	54%	37%	8%	3%	3%	2%	1%
Spain	90%	46%	44%	9%	3%	3%	3%	1%
France	90%	44%	46%	9%	4%	3%	2%	1%
Italy	84%	46%	38%	12%	2%	7%	3%	4%
Norway	76%	35%	41%	23%	15%	5%	3%	1%
Netherlands	86%	77%	9%	14%	5%	6%	3%	0%
Poland	96%	71%	25%	3%	1%	1%	1%	1%
Portugal	93%	47%	46%	7%	3%	2%	2%	0%
United Kingdom	87%	59%	28%	13%	7%	3%	3%	0%
Turkey	94%	55%	39%	4%	2%	0%	2%	2%
South Africa	100%	82%	18%	0%	0%	0%	0%	0%
Japan	76%	73%	3%	23%	2%	17%	4%	1%
China	78%	76%	2%	22%	6%	4%	12%	0%
United States	90%	86%	4%	9%	4%	3%	2%	1%
Mexico	98%	96%	2%	2%	1%	0%	1%	0%
Brazil	87%	83%	4%	7%	0%	6%	1%	6%
18-COUNTRY AVERAGE	89%	63%	26%	10%	3%	4%	3%	1%

Apart from your car, what equipment do you use to get around?

To those who have at least one car in their household. Several answers possible.

	Subtotal at least one equipment	A bike	A motorised two- wheeler (motorbike, scooter, etc.)	A scooter	I don't use any other equipment to get around
Germany	66%	56%	16%	9%	34%
Austria	66%	57%	15%	9%	34%
Belgium	60%	52%	7%	8%	40%
Spain	50%	38%	20%	10%	50%
France	49%	40%	12%	11%	51%
Italy	64%	52%	25%	7%	36%
Norway	51%	38%	11%	11%	49%
Netherlands	85%	78%	12%	4%	15%
Poland	74%	69%	10%	11%	26%
Portugal	30%	20%	11%	4%	70%
United Kingdom	34%	25%	9%	5%	66%
Turkey	43%	29%	20%	8%	57%
South Africa	27%	19%	9%	3%	73%
Japan	60%	54%	14%	4%	40%
China	71%	50%	39%	6%	29%
United States	30%	22%	11%	3%	70%
Mexico	49%	33%	26%	3%	51%
Brazil	56%	33%	33%	1%	44%
18-COUNTRY AVERAGE	54%	42%	16%	6%	46%

How often do you use your vehicle?

To those who have at least one car in their household. ST Regularly or more often.

	For daily journeys, e.g. commuting to and from work	For leisure and personal journeys (shopping, sports activities, etc)	For occasional journeys, such as holidays or weekends away
Germany	70%	90%	74%
Austria	63%	91%	78%
Belgium	69%	89%	74%
Spain	74%	88%	89%
France	64%	92%	82%
Italy	80%	92%	86%
Norway	68%	87%	73%
Netherlands	65%	85%	73%
Poland	74%	86%	78%
Portugal	81%	93%	80%
United Kingdom	64%	93%	70%
Turkey	82%	83%	84%
South Africa	90%	94%	77%
Japan	64%	83%	81%
China	90%	89%	79%
United States	80%	94%	77%
Mexico	90%	94%	83%
Brazil	82%	97%	87%
18-COUNTRY AVERAGE	75%	90%	79%

How many kilometers do you drive in your vehicle per year?

To those who have at least one car in their household.

	ST until 9,300 miles	Less than 3,100 miles	Between 3,100 and 6,199 miles	Between 6,200 and 9,300 miles	ST 9,299 miles or more	Between 9,300 and 12,400 miles	Between 12,400 and 15,500 miles	Between 15,500 and 18,600 miles	More than 18,600 miles
Germany	61%	11%	25%	25%	39%	21%	10%	4%	4%
Austria	62%	9%	28%	25%	38%	19%	10%	5%	4%
Belgium	63%	14%	27%	22%	37%	16%	12%	4%	5%
Spain	62%	14%	27%	21%	38%	17%	12%	5%	4%
France	69%	14%	28%	27%	31%	17%	8%	3%	3%
Italy	60%	9%	24%	27%	40%	20%	9%	7%	4%
Norway	70%	15%	27%	28%	30%	15%	8%	3%	4%
Netherlands	67%	12%	29%	26%	33%	18%	6%	5%	4%
Poland	67%	15%	30%	22%	33%	14%	9%	5%	5%
Portugal	65%	19%	28%	18%	35%	14%	6%	5%	10%
United Kingdom	71%	14%	32%	25%	29%	15%	8%	2%	4%
Turkey	50%	7%	22%	21%	50%	18%	12%	9%	11%
South Africa	58%	15%	24%	19%	42%	16%	9%	7%	10%
Japan	70%	27%	27%	16%	30%	11%	8%	5%	6%
China	57%	11%	21%	25%	43%	20%	9%	7%	7%
United States	59%	16%	23%	20%	41%	19%	12%	4%	6%
Mexico	53%	13%	23%	17%	47%	19%	12%	7%	9%
Brazil	51%	11%	21%	19%	49%	15%	10%	8%	16%
18-COUNTRY AVERAGE	62%	14%	26%	22%	38%	17%	10%	5%	6%

Where do you use your vehicle?

To those who have at least one car in their household.

	ST Mostly or exclusively in town	Almost exclusively in town, in an urban environment	Mostly in town	ST Both in urban and more rural environments	Both in urban and more rural environments	ST Mostly or exclusively in rural areas	Mostly in rural areas	Almost exclusively in rural areas
Germany	34%	17%	17%	53%	53%	13%	11%	2%
Austria	16%	7%	9%	56%	56%	28%	21%	7%
Belgium	25%	12%	13%	60%	60%	15%	11%	4%
Spain	45%	19%	26%	48%	48%	7%	7%	0%
France	34%	14%	20%	49%	49%	17%	14%	3%
Italy	51%	19%	32%	44%	44%	5%	4%	1%
Norway	34%	12%	22%	47%	47%	19%	14%	5%
Netherlands	24%	10%	14%	68%	68%	8%	7%	1%
Poland	44%	16%	28%	51%	51%	5%	4%	1%
Portugal	58%	25%	33%	34%	34%	8%	6%	2%
United Kingdom	42%	20%	22%	48%	48%	10%	9%	1%
Turkey	68%	27%	41%	31%	31%	1%	0%	1%
South Africa	66%	40%	26%	32%	32%	2%	2%	0%
Japan	59%	32%	27%	34%	34%	7%	5%	2%
China	80%	46%	34%	18%	18%	2%	1%	1%
United States	57%	27%	30%	36%	36%	7%	6%	1%
Mexico	73%	39%	34%	26%	26%	1%	1%	0%
Brazil	88%	49%	39%	12%	12%	0%	0%	0%
18-COUNTRY AVERAGE	49%	23%	26%	42%	42%	9%	7%	2%

Have you ever owned a car?

To those who have no car in their household.

	Yes	No
Germany	43%	57%
Austria	52%	48%
Belgium	50%	50%
Spain	56%	44%
France	33%	67%
Italy	51%	49%
Norway	47%	53%
Netherlands	29%	71%
Poland	41%	59%
Portugal	39%	61%
United Kingdom	33%	67%
Turkey	44%	56%
South Africa	12%	88%
Japan	43%	57%
China	7%	93%
United States	55%	45%
Mexico	50%	50%
Brazil	36%	64%
18-COUNTRY AVERAGE	38%	62%

Why don't you own a car?

To those who have no car in their household. Up to 3 answers.

	ST Because of the cost	You would not have the financial means to own one	You consider the public transport network to be sufficient to get around	You consider the operating costs to be too high	You have no use for one	You consider the purchase cost to be too high		You are unable to drive	You think that cars have a negative impact on the environment	You borrow a third party's car when you need one	You hire a car when you need one	You use carpooling or carsharing when you need to	Other	
Germany	51%	28%	29%	17%	31%	24%		18%	14%	3%	2%	4%	9%	Germany
Austria	45%	31%	35%	19%	32%	17%		11%	16%	12%	6%	11%	4%	Austria
Belgium	44%	31%	25%	21%	38%	17%		22%	10%	3%	4%	4%	12%	Belgium
Spain	46%	35%	26%	9%	37%	10%		12%	4%	8%	2%	6%	5%	Spain
France	49%	28%	25%	23%	33%	15%		15%	13%	4%	5%	4%	14%	France
Italy	47%	22%	31%	34%	34%	18%		8%	11%	8%	0%	3%	12%	Italy
Norway	55%	41%	22%	22%	30%	12%		15%	9%	5%	5%	3%	12%	Norway
Netherlands	43%	24%	24%	20%	32%	12%		19%	8%	6%	3%	2%	18%	Netherlands
Poland	75%	43%	25%	34%	11%	23%		11%	12%	1%	3%	2%	11%	Poland
Portugal	56%	45%	15%	13%	14%	11%		10%	8%	1%	4%	2%	15%	Portugal
United Kingdom	52%	29%	16%	26%	20%	21%		25%	10%	4%	2%	1%	9%	United Kingdom
Turkey	78%	50%	12%	28%	6%	35%		4%	2%	11%	8%	4%	2%	Turkey
South Africa	76%	59%	15%	9%	5%	21%		11%	0%	4%	5%	1%	6%	South Africa
Japan	47%	25%	51%	19%	31%	18%		11%	3%	2%	15%	7%	7%	Japan
China	71%	31%	32%	40%	19%	32%		11%	11%	10%	14%	9%	5%	China
United States	50%	32%	17%	20%	16%	17%		30%	5%	3%	3%	5%	15%	United States
Mexico	67%	49%	16%	11%	12%	18%		3%	8%	8%	5%	4%	7%	Mexico
Brazil	70%	45%	9%	20%	4%	31%		30%	6%	6%	7%	2%	7%	Brazil
18-COUNTRY AVERAGE	60%	38%	23%	22%	20%	21%		15%	8%	6%	6%	4%	9%	18-COUNTRY AVERAGE

How did you finance your current car?

To those who have at least one car in their household.

	Cash (without any loan or other type of financing)	Traditional loan (Hire Purchase)	ST Leasing	Personal Contract Purchase	Finance Lease - Lease with the option to buy	Personal Contract Hire	Other
Germany	60%	26%	11%	4%	4%	3%	3%
Austria	67%	14%	16%	1%	14%	1%	3%
Belgium	52%	34%	8%	5%	0%	3%	6%
Spain	48%	44%	6%	2%	3%	1%	2%
France	53%	33%	11%	2%	7%	2%	3%
Italy	52%	34%	11%	6%	4%	1%	3%
Norway	50%	35%	8%	4%	3%	1%	7%
Netherlands	73%	7%	15%	5%	4%	6%	5%
Poland	74%	13%	6%	1%	4%	1%	4%
Portugal	61%	27%	7%	2%	3%	2%	5%
United Kingdom	57%	16%	22%	15%	6%	1%	5%
Turkey	60%	32%	6%	2%	3%	1%	2%
South Africa	50%	29%	19%	10%	7%	2%	2%
Japan	65%	25%	7%	3%	2%	2%	3%
China	59%	23%	16%	12%	2%	2%	2%
United States	41%	38%	16%	6%	9%	1%	5%
Mexico	50%	42%	4%	2%	2%	0%	4%
Brazil	41%	47%	7%	5%	1%	1%	5%
18-COUNTRY AVERAGE	56%	29%	11%	5%	4%	2%	4%

How much did you pay for this vehicle (total price, minus any discounts and negotiations)?

To those who have at least one car in their household. Mean with filter €500.

	Less than €5,000	Between €5,000 and €14,999	Between €15,000 and €29,999	€30,000 or more
Germany	14%	26%	38%	22%
Austria	12%	34%	38%	16%
Belgium	11%	30%	42%	17%
Spain	9%	27%	49%	15%
France	13%	38%	37%	12%
Italy	9%	35%	45%	11%
Norway	22%	27%	28%	23%
Netherlands	21%	40%	24%	15%
Poland	52%	34%	11%	3%
Portugal	23%	31%	32%	14%
United Kingdom	25%	39%	26%	10%
Turkey	44%	39%	13%	4%
South Africa	27%	40%	23%	10%
Japan	15%	42%	32%	11%
China	4%	14%	54%	28%
United States	19%	23%	37%	21%
Mexico	33%	46%	17%	4%
Brazil	31%	56%	11%	2%
18-COUNTRY AVERAGE	21%	34%	32%	13%

You leased your vehicle. How much are/were your monthly payments (excluding insurance) for leasing this vehicle?

To those who leased their car.

	Less than €100	From €100 to €199	From €200 to €299	From €300 to €499	€500 or more
Germany	14%	16%	31%	22%	16%
Austria	5%	36%	35%	17%	6%
Belgium	2%	27%	28%	15%	28%
Spain	15%	22%	24%	21%	16%
France	6%	17%	31%	31%	14%
Italy	5%	14%	26%	37%	18%
Norway	36%	19%	19%	13%	12%
Netherlands	11%	14%	21%	22%	32%
Poland	18%	23%	18%	21%	21%
Portugal	0%	29%	32%	18%	20%
United Kingdom	18%	14%	40%	21%	8%
Turkey	41%	14%	15%	0%	30%
South Africa	12%	25%	29%	27%	7%
Japan	14%	19%	24%	31%	13%
China	10%	24%	17%	22%	27%
United States	6%	19%	26%	37%	12%
Mexico	11%	26%	34%	16%	13%
Brazil	42%	26%	13%	15%	3%
18-COUNTRY AVERAGE	13%	21%	27%	23%	16%

At the time of purchase, did you find the price of this vehicle to be?

To those who bought their car without leasing.

	ST high	Very high	Fairly high	ST Reasonable	Fairly reasonable	Very reasonable
Germany	33%	10%	23%	67%	56%	11%
Austria	21%	4%	17%	79%	64%	15%
Belgium	37%	5%	32%	63%	51%	12%
Spain	32%	5%	27%	68%	60%	8%
France	40%	5%	35%	60%	53%	7%
Italy	32%	4%	28%	68%	58%	10%
Norway	36%	10%	26%	64%	39%	25%
Netherlands	25%	3%	22%	75%	66%	9%
Poland	31%	5%	26%	69%	59%	10%
Portugal	21%	5%	16%	79%	69%	10%
United Kingdom	28%	7%	21%	72%	60%	12%
Turkey	50%	18%	32%	50%	47%	3%
South Africa	39%	9%	30%	61%	52%	9%
Japan	44%	7%	37%	56%	51%	5%
China	33%	4%	29%	67%	63%	4%
United States	35%	10%	25%	65%	53%	12%
Mexico	29%	4%	25%	71%	59%	12%
Brazil	41%	9%	32%	59%	49%	10%
18-COUNTRY AVERAGE	34%	7%	27%	66%	56%	10%

How much does your vehicle insurance cost per year?

To those who have at least one car in their household.

	Less than €200	From €200 to €399	From €400 to €599	From €600 to €799	€800 and more
Germany	8%	33%	27%	14%	18%
Austria	5%	9%	13%	15%	58%
Belgium	3%	19%	27%	15%	36%
Spain	9%	47%	27%	9%	8%
France	4%	25%	34%	18%	19%
Italy	4%	31%	28%	18%	19%
Norway	7%	15%	23%	17%	38%
Netherlands	7%	26%	26%	17%	24%
Poland	50%	32%	10%	4%	4%
Portugal	29%	46%	12%	7%	6%
United Kingdom	12%	40%	22%	8%	18%
Turkey	53%	31%	7%	1%	8%
South Africa	8%	26%	13%	21%	32%
Japan	18%	48%	17%	7%	10%
China	5%	23%	36%	19%	17%
United States	9%	13%	21%	11%	46%
Mexico	16%	38%	24%	7%	15%
Brazil	20%	44%	21%	6%	9%
18-COUNTRY AVERAGE	13%	30%	22%	12%	23%

Do you consider the amount of this insurance to be?

To those who have at least one car in their household.

	ST High	Very high	Fairly high	ST Reasonable	Fairly reasonable	Very reasonable
Germany	38%	11%	27%	62%	52%	10%
Austria	42%	8%	34%	58%	50%	8%
Belgium	56%	15%	41%	44%	39%	5%
Spain	48%	10%	38%	52%	48%	4%
France	52%	11%	41%	48%	43%	5%
Italy	50%	11%	39%	50%	39%	11%
Norway	54%	17%	37%	46%	31%	15%
Netherlands	36%	6%	30%	64%	54%	10%
Poland	53%	11%	42%	47%	41%	6%
Portugal	48%	14%	34%	52%	43%	9%
United Kingdom	42%	12%	30%	58%	49%	9%
Turkey	71%	29%	42%	29%	27%	2%
South Africa	50%	16%	34%	50%	34%	16%
Japan	49%	11%	38%	51%	43%	8%
China	43%	5%	38%	57%	50%	7%
United States	44%	14%	30%	56%	46%	10%
Mexico	42%	9%	33%	58%	45%	13%
Brazil	58%	22%	36%	42%	31%	11%
18-COUNTRY AVERAGE	49%	13%	36%	51%	42%	9%

How much do you estimate the maintenance and repair of your vehicle to be per year?

To those who have at least one car in their household.

	Less than €200	From €200 to €399	From €400 to €599	From €600 to €799	€800 or more
Germany	12%	32%	27%	7%	22%
Austria	7%	23%	29%	11%	30%
Belgium	12%	36%	28%	6%	18%
Spain	14%	39%	21%	7%	19%
France	16%	34%	25%	5%	20%
Italy	14%	42%	26%	4%	14%
Norway	18%	15%	26%	6%	35%
Netherlands	12%	27%	29%	8%	24%
Poland	39%	32%	15%	6%	8%
Portugal	20%	35%	25%	4%	16%
United Kingdom	22%	39%	24%	3%	12%
Turkey	43%	32%	15%	1%	9%
South Africa	20%	28%	11%	16%	25%
Japan	11%	21%	6%	25%	37%
China	19%	21%	19%	15%	26%
United States	25%	23%	19%	4%	29%
Mexico	16%	37%	23%	6%	18%
Brazil	28%	26%	18%	6%	22%
18-COUNTRY AVERAGE	19%	30%	22%	8%	21%

Do you consider the amount for maintenance and repairs of your vehicle per year to be?

To those who have at least one car in their household.

	ST High	Very high	Fairly high	ST Reasonable	Fairly reasonable	Very reasonable
Germany	36%	10%	26%	64%	52%	12%
Austria	37%	9%	28%	63%	52%	11%
Belgium	46%	12%	34%	54%	45%	9%
Spain	48%	10%	38%	52%	43%	9%
France	45%	11%	34%	55%	44%	11%
Italy	43%	9%	34%	57%	46%	11%
Norway	44%	16%	28%	56%	36%	20%
Netherlands	33%	5%	28%	67%	53%	14%
Poland	43%	9%	34%	57%	47%	10%
Portugal	43%	11%	32%	57%	47%	10%
United Kingdom	34%	10%	24%	66%	51%	15%
Turkey	72%	30%	42%	28%	26%	2%
South Africa	44%	16%	28%	56%	43%	13%
Japan	60%	13%	47%	40%	37%	3%
China	38%	6%	32%	62%	53%	9%
United States	30%	10%	20%	70%	47%	23%
Mexico	40%	9%	31%	60%	49%	11%
Brazil	53%	18%	35%	47%	37%	10%
18-COUNTRY AVERAGE	44%	12%	32%	56%	45%	11%

How much do you spend on fuel per month?

To those who have at least one car in their household.

	ST High	Very high	Fairly high	ST reasonable	Fairly reasonable	Very reasonable
Germany	69%	33%	36%	31%	26%	5%
Austria	73%	42%	31%	27%	20%	7%
Belgium	79%	49%	30%	21%	17%	4%
Spain	82%	47%	35%	18%	14%	4%
France	77%	43%	34%	23%	18%	5%
Italy	69%	28%	41%	31%	25%	6%
Norway	60%	37%	23%	40%	21%	19%
Netherlands	69%	33%	36%	31%	22%	9%
Poland	76%	36%	40%	24%	19%	5%
Portugal	73%	42%	31%	27%	21%	6%
United Kingdom	71%	37%	34%	29%	23%	6%
Turkey	88%	58%	30%	12%	11%	1%
South Africa	74%	46%	28%	26%	20%	6%
Japan	60%	15%	45%	40%	34%	6%
China	49%	7%	42%	51%	40%	11%
United States	71%	42%	29%	29%	20%	9%
Mexico	64%	28%	36%	36%	29%	7%
Brazil	77%	46%	31%	23%	16%	7%
18-COUNTRY AVERAGE	71%	37%	34%	29%	22%	7%

How much do you spend on fuel per month?

To those who have at least one car in their household.

	Less than €50	From €50 to €99	From €100 to €199	€200 or more
Germany	7%	23%	38%	32%
Austria	5%	25%	38%	32%
Belgium	5%	24%	34%	37%
Spain	6%	27%	36%	31%
France	6%	28%	38%	28%
Italy	7%	29%	38%	26%
Norway	19%	26%	32%	23%
Netherlands	10%	31%	33%	26%
Poland	18%	38%	28%	16%
Portugal	11%	33%	37%	19%
United Kingdom	19%	33%	31%	17%
Turkey	16%	34%	35%	15%
South Africa	13%	33%	38%	16%
Japan	41%	31%	16%	12%
China	20%	38%	28%	14%
United States	15%	26%	31%	28%
Mexico	29%	36%	24%	11%
Brazil	22%	45%	25%	8%
18-COUNTRY AVERAGE	14%	31%	33%	22%

In terms of the overall budget for this vehicle, would you say that, in relation to your means, it is...

To those who have at least one car in their household.

	ST High	Very high	Fairly high	ST reasonable	Fairly reasonable	Very reasonable
Germany	47%	14%	33%	53%	49%	4%
Austria	54%	15%	39%	46%	43%	3%
Belgium	66%	24%	42%	34%	30%	4%
Spain	61%	18%	43%	39%	34%	5%
France	62%	18%	44%	38%	34%	4%
Italy	55%	11%	44%	45%	40%	5%
Norway	56%	23%	33%	44%	33%	11%
Netherlands	48%	11%	37%	52%	45%	7%
Poland	63%	19%	44%	37%	33%	4%
Portugal	52%	14%	38%	48%	42%	6%
United Kingdom	55%	17%	38%	45%	39%	6%
Turkey	83%	45%	38%	17%	15%	2%
South Africa	62%	24%	38%	38%	33%	5%
Japan	60%	14%	46%	40%	37%	3%
China	35%	4%	31%	65%	55%	10%
United States	47%	17%	30%	53%	41%	12%
Mexico	52%	12%	40%	48%	40%	8%
Brazil	75%	29%	46%	25%	22%	3%
18-COUNTRY AVERAGE	57%	18%	39%	43%	37%	6%

The operating cost of cars mainly includes fuel, maintenance, insurance and parking.

In recent years, would you say that the operating cost of your vehicle?

To those who have at least one car in their household.

	ST Has increased	Has increased significantly	Has increased slightly	ST Neither easier nor more difficult	Has remained the same	ST Has decreased	Has decreased slightly	Has decreased significantly
Germany	79%	43%	36%	18%	18%	3%	2%	1%
Austria	86%	56%	30%	12%	12%	2%	1%	1%
Belgium	81%	55%	26%	17%	17%	2%	2%	0%
Spain	87%	55%	32%	12%	12%	1%	1%	0%
France	83%	54%	29%	14%	14%	3%	2%	1%
Italy	86%	54%	32%	12%	12%	2%	1%	1%
Norway	74%	48%	26%	20%	20%	6%	4%	2%
Netherlands	71%	35%	36%	23%	23%	6%	5%	1%
Poland	89%	64%	25%	10%	10%	1%	1%	0%
Portugal	86%	58%	28%	11%	11%	3%	2%	1%
United Kingdom	84%	49%	35%	13%	13%	3%	2%	1%
Turkey	95%	82%	13%	4%	4%	1%	1%	0%
South Africa	91%	58%	33%	8%	8%	1%	1%	0%
Japan	65%	24%	41%	30%	30%	5%	4%	1%
China	68%	10%	58%	28%	28%	4%	4%	0%
United States	79%	43%	36%	18%	18%	3%	2%	1%
Mexico	86%	48%	38%	12%	12%	2%	1%	1%
Brazil	91%	69%	22%	7%	7%	2%	2%	0%
18-COUNTRY AVERAGE	82%	50%	32%	15%	15%	3%	2%	1%

Would you say that it is financially easier or more difficult for you to own a car than it was for your parents at your age?

To those who have at least one car in their household.

	ST Easier	Significantly easier	Lightly easier	ST Neither easier nor more difficult	Neither easier nor more difficult	ST More difficult	Slightly more difficult	Significantly more difficult
Germany	35%	15%	20%	30%	30%	35%	19%	16%
Austria	29%	12%	17%	27%	27%	44%	21%	23%
Belgium	18%	7%	11%	32%	32%	50%	24%	26%
Spain	27%	10%	17%	26%	26%	47%	23%	24%
France	25%	9%	16%	29%	29%	46%	24%	22%
Italy	22%	8%	14%	26%	26%	52%	26%	26%
Norway	29%	12%	17%	34%	34%	37%	19%	18%
Netherlands	33%	12%	21%	36%	36%	31%	18%	13%
Poland	35%	16%	19%	30%	30%	35%	19%	16%
Portugal	37%	17%	20%	17%	17%	46%	22%	24%
United Kingdom	29%	11%	18%	32%	32%	39%	22%	17%
Turkey	38%	18%	20%	6%	6%	56%	20%	36%
South Africa	28%	10%	18%	18%	18%	54%	24%	30%
Japan	28%	9%	19%	41%	41%	31%	20%	11%
China	66%	15%	51%	20%	20%	14%	12%	2%
United States	29%	11%	18%	29%	29%	42%	22%	20%
Mexico	34%	12%	22%	22%	22%	44%	27%	17%
Brazil	44%	19%	25%	16%	16%	40%	23%	17%
18-COUNTRY AVERAGE	32%	12%	20%	26%	26%	42%	22%	20%

Do you consider owning a car to be...?

To all.

	ST Accessible	Financially accessible to all	Accessible but requires financial sacrifice	Accessible only to those who are well-off
Germany	80%	19%	61%	20%
Austria	79%	12%	67%	21%
Belgium	82%	9%	73%	18%
Spain	86%	9%	77%	14%
France	83%	10%	73%	17%
Italy	90%	11%	79%	10%
Norway	86%	18%	68%	14%
Netherlands	86%	13%	73%	14%
Poland	92%	19%	73%	8%
Portugal	85%	8%	77%	15%
United Kingdom	87%	20%	67%	13%
Turkey	57%	11%	46%	43%
South Africa	83%	19%	64%	17%
Japan	88%	15%	73%	12%
China	97%	44%	53%	3%
United States	90%	27%	63%	10%
Mexico	89%	11%	78%	11%
Brazil	82%	9%	73%	18%
18-COUNTRY AVERAGE	85%	16%	69%	15%

Have you ever decided not to make a journey because of the cost of transport (whatever means of travel you had planned: fuel, tolls for a car journey, price of train or plane tickets, etc.)?

To all.

	Yes	No
Germany	45%	55%
Austria	45%	55%
Belgium	52%	48%
Spain	57%	43%
France	62%	38%
Italy	55%	45%
Norway	64%	36%
Netherlands	45%	55%
Poland	53%	47%
Portugal	70%	30%
United Kingdom	58%	42%
Turkey	79%	21%
South Africa	79%	21%
Japan	33%	67%
China	44%	56%
United States	61%	39%
Mexico	68%	32%
Brazil	77%	23%
18-COUNTRY AVERAGE	58%	42%

Today, for each of the following situations, which means of transport do you use most often when you do not take your car? - For daily journeys, e.g. commuting to and from work.

To those who have at least one car in their household.

	ST Soft mobility, public transport or train	Soft mobility: on foot, bicycle, scooter	Public transport: metro, bus, tram	ST Carsharing or carpooling	Carsharing, car hire	Carpooling	Train	None of these; you systematically take your car
Germany	40%	14%	18%	9%	3%	6%	8%	51%
Austria	48%	17%	22%	6%	2%	4%	8%	46%
Belgium	44%	21%	14%	9%	4%	5%	10%	47%
Spain	54%	20%	29%	13%	4%	9%	5%	33%
France	41%	18%	16%	10%	3%	7%	7%	50%
Italy	50%	21%	22%	5%	4%	2%	7%	45%
Norway	44%	14%	22%	9%	5%	4%	8%	47%
Netherlands	46%	29%	9%	8%	5%	3%	9%	45%
Poland	59%	23%	28%	5%	3%	2%	8%	36%
Portugal	48%	14%	25%	7%	3%	4%	10%	44%
United Kingdom	38%	14%	15%	10%	6%	5%	10%	52%
Turkey	60%	13%	44%	16%	6%	10%	3%	24%
South Africa	46%	5%	38%	20%	13%	8%	4%	34%
Japan	60%	16%	21%	4%	2%	2%	23%	36%
China	67%	21%	43%	9%	6%	3%	3%	24%
United States	19%	8%	9%	15%	7%	8%	3%	65%
Mexico	51%	10%	41%	27%	14%	13%	1%	21%
Brazil	55%	15%	38%	17%	13%	4%	2%	28%
18-COUNTRY AVERAGE	48%	16%	25%	11%	6%	5%	7%	41%

Today, for occasional journeys, such as weekends and holidays, which means of transport do you use most often when you do not take your car?

To those who have at least one car in their household.

	ST Soft mobility, public transport or train	Soft mobility: on foot, bicycle, scooter	Public transport: metro, bus, tram	ST Carsharing or carpooling	Carsharing, car hire	Carpooling	Train	None of these; you systematically take your car	
Germany	44%	20%	16%	10%	4%	6%	8%	46%	Germany
Austria	48%	24%	15%	7%	3%	4%	9%	45%	Austria
Belgium	50%	23%	15%	7%	2%	5%	12%	43%	Belgium
Spain	48%	16%	24%	15%	5%	10%	8%	37%	Spain
France	41%	18%	14%	10%	3%	6%	8%	49%	France
Italy	49%	11%	14%	8%	5%	3%	24%	42%	Italy
Norway	37%	10%	17%	14%	6%	7%	9%	49%	Norway
Netherlands	58%	39%	9%	7%	4%	3%	9%	36%	Netherlands
Poland	58%	20%	14%	6%	4%	2%	24%	36%	Poland
Portugal	38%	11%	16%	11%	5%	6%	11%	51%	Portugal
United Kingdom	41%	12%	16%	12%	8%	4%	13%	47%	United Kingdom
Turkey	49%	18%	25%	22%	7%	15%	5%	30%	Turkey
South Africa	33%	6%	25%	29%	24%	5%	2%	37%	South Africa
Japan	53%	8%	23%	7%	4%	2%	22%	41%	Japan
China	63%	22%	27%	13%	9%	4%	13%	24%	China
United States	20%	8%	9%	17%	7%	11%	3%	63%	United States
Mexico	38%	13%	23%	35%	19%	16%	2%	28%	Mexico
Brazil	35%	9%	23%	26%	20%	5%	3%	40%	Brazil
18-COUNTRY AVERAGE	44%	16%	18%	14%	8%	6%	10%	42%	18-COUNTRY AVERAGE

Today, for occasional journeys, such as weekends and holidays, which means of transport do you use most often when you do not take your car?

To those who have at least one car in their household.

	ST Carsharing or carpooling	Carsharing car hire	Carpooling	ST Train or coach	Coach		Train	ST Boat or plane	Boat	Plane	None of these; you systematically take your car	
Germany	9%	4%	5%	25%	5%		20%	15%	2%	13%	51%	Germany
Austria	10%	2%	8%	28%	4%		24%	17%	1%	16%	45%	Austria
Belgium	7%	2%	5%	27%	4%		23%	19%	1%	18%	47%	Belgium
Spain	15%	5%	10%	42%	25%		17%	12%	1%	11%	31%	Spain
France	11%	3%	8%	27%	4%		23%	10%	1%	9%	52%	France
Italy	8%	6%	2%	37%	7%		30%	17%	2%	15%	38%	Italy
Norway	12%	6%	6%	29%	18%		11%	19%	2%	17%	40%	Norway
Netherlands	8%	4%	4%	24%	5%		19%	18%	2%	16%	50%	Netherlands
Poland	4%	3%	1%	54%	15%		39%	6%	1%	5%	36%	Poland
Portugal	11%	4%	7%	28%	13%		15%	19%	1%	18%	42%	Portugal
United Kingdom	9%	6%	3%	34%	6%		28%	11%	3%	8%	46%	United Kingdom
Turkey	19%	7%	12%	49%	44%		5%	10%	1%	9%	22%	Turkey
South Africa	41%	33%	8%	9%	5%		4%	15%	0%	15%	35%	South Africa
Japan	5%	3%	2%	55%	9%		46%	3%	1%	2%	37%	Japan
China	25%	19%	6%	40%	10%		30%	19%	0%	19%	16%	China
United States	19%	10%	9%	11%	7%		4%	12%	1%	11%	58%	United States
Mexico	35%	17%	18%	37%	35%		2%	10%	0%	10%	18%	Mexico
Brazil	20%	17%	3%	39%	35%		4%	12%	0%	12%	29%	Brazil
18-COUNTRY AVERAGE	15%	8%	7%	33%	14%		19%	13%	1%	12%	39%	18-COUNTRY AVERAGE

Today, for occasional journeys, such as weekends and holidays, which means of transport do you use most often when you do not take your car?

To those who have at least one car in their household.

	Soft mobility: on foot, bicycle, scooter			Public transport: metro, bus, tram			Carsharing, car hire			Carpooling			Train			Coach			Plane			
	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	More often than before	As much as before	Less often than before	
Germany	28%	54%	18%	20%	55%	25%	10%	55%	35%	12%	57%	31%	17%	57%	26%	11%	55%	34%	9%	50%	41%	Germany
Austria	35%	48%	17%	24%	51%	25%	5%	52%	43%	10%	55%	35%	19%	53%	28%	5%	54%	41%	5%	46%	49%	Austria
Belgium	37%	47%	16%	20%	50%	30%	5%	57%	38%	9%	56%	35%	18%	54%	28%	12%	50%	38%	7%	50%	43%	Belgium
Spain	37%	49%	14%	28%	50%	22%	10%	56%	34%	14%	55%	31%	14%	58%	28%	23%	54%	23%	8%	53%	39%	Spain
France	35%	46%	19%	20%	50%	30%	8%	52%	40%	14%	50%	36%	18%	50%	32%	10%	52%	38%	8%	50%	42%	France
Italy	38%	46%	16%	19%	51%	30%	8%	54%	38%	5%	53%	42%	20%	52%	28%	11%	55%	34%	10%	49%	41%	Italy
Norway	23%	51%	26%	16%	51%	33%	9%	46%	45%	13%	48%	39%	16%	49%	35%	21%	51%	28%	10%	42%	48%	Norway
Netherlands	41%	45%	14%	12%	56%	32%	5%	56%	39%	7%	55%	38%	15%	53%	32%	12%	54%	34%	5%	49%	46%	Netherlands
Poland	41%	42%	17%	24%	51%	25%	6%	41%	53%	5%	41%	54%	23%	47%	30%	13%	48%	39%	6%	45%	49%	Poland
Portugal	32%	42%	26%	24%	40%	36%	7%	41%	52%	12%	41%	47%	17%	44%	39%	20%	42%	38%	8%	40%	52%	Portugal
United Kingdom	29%	47%	24%	22%	51%	27%	10%	53%	37%	10%	54%	36%	16%	53%	31%	8%	55%	37%	7%	47%	46%	United Kingdom
Turkey	50%	33%	17%	53%	26%	21%	23%	40%	37%	30%	40%	30%	27%	39%	34%	46%	29%	25%	20%	35%	45%	Turkey
South Africa	19%	31%	50%	26%	29%	45%	22%	32%	46%	13%	28%	59%	7%	23%	70%	7%	26%	67%	10%	29%	61%	South Africa
Japan	20%	68%	12%	13%	62%	25%	6%	71%	23%	5%	73%	22%	14%	62%	24%	9%	65%	26%	5%	62%	33%	Japan
China	29%	48%	23%	33%	45%	22%	25%	39%	36%	19%	37%	44%	21%	44%	35%	12%	40%	48%	16%	44%	40%	China
United States	14%	52%	34%	12%	49%	39%	12%	49%	39%	14%	51%	35%	8%	49%	43%	11%	48%	41%	9%	49%	42%	United States
Mexico	28%	39%	33%	23%	34%	43%	18%	36%	46%	17%	37%	46%	5%	20%	75%	19%	39%	42%	6%	35%	59%	Mexico
Brazil	35%	34%	31%	30%	28%	42%	20%	30%	50%	9%	26%	65%	12%	27%	61%	22%	31%	47%	9%	30%	61%	Brazil
18-COUNTRY AVERAGE	32%	46%	22%	23%	46%	31%	12%	48%	40%	12%	48%	40%	16%	47%	37%	15%	47%	38%	9%	45%	46%	18-COUNTRY AVERAGE

When you last purchased a vehicle, did you forego certain features and benefits in order to reduce the purchase price?

To those who have at least one car in their household.

	Yes	No
Germany	36%	64%
Austria	33%	67%
Belgium	40%	60%
Spain	45%	55%
France	42%	58%
Italy	50%	50%
Norway	42%	58%
Netherlands	33%	67%
Poland	34%	66%
Portugal	61%	39%
United Kingdom	35%	65%
Turkey	57%	43%
South Africa	55%	45%
Japan	34%	66%
China	44%	56%
United States	37%	63%
Mexico	46%	54%
Brazil	60%	40%
18-COUNTRY AVERAGE	43%	57%

You purchased a second-hand car. Did you decide not to purchase a new vehicle because you thought the cost was too high?

To those who purchased a second-hand car.

	ST Yes	Yes, definitely	Yes, to an extent	ST No	No, not really	No, not at all
Germany	78%	50%	28%	22%	15%	7%
Austria	79%	55%	24%	21%	15%	6%
Belgium	82%	57%	25%	18%	10%	8%
Spain	85%	57%	28%	15%	13%	2%
France	80%	51%	29%	20%	11%	9%
Italy	88%	55%	33%	12%	7%	5%
Norway	78%	49%	29%	22%	16%	6%
Netherlands	82%	58%	24%	18%	13%	5%
Poland	86%	63%	23%	14%	10%	4%
Portugal	93%	72%	21%	7%	5%	2%
United Kingdom	83%	58%	25%	17%	13%	4%
Turkey	89%	61%	28%	11%	7%	4%
South Africa	87%	63%	24%	13%	10%	3%
Japan	81%	48%	33%	19%	12%	7%
China	78%	27%	51%	22%	16%	6%
United States	72%	47%	25%	28%	19%	9%
Mexico	92%	61%	31%	8%	5%	3%
Brazil	95%	64%	31%	5%	4%	1%
18-COUNTRY AVERAGE	84%	57%	27%	16%	11%	5%

You didn't purchase an electric vehicle. Did you decide not to purchase an electric vehicle because you thought the cost was too high?

To those who didn't purchase electric vehicle.

	ST Yes	Yes, definitely	Yes, to an extent	ST No	No, not really	No, not at all
Germany	62%	38%	24%	38%	21%	17%
Austria	61%	39%	22%	39%	21%	18%
Belgium	70%	48%	22%	30%	16%	14%
Spain	75%	41%	34%	25%	17%	8%
France	70%	44%	26%	30%	15%	15%
Italy	75%	42%	33%	25%	12%	13%
Norway	49%	25%	24%	51%	29%	22%
Netherlands	73%	51%	22%	27%	17%	10%
Poland	83%	61%	22%	17%	12%	5%
Portugal	81%	59%	22%	19%	11%	8%
United Kingdom	73%	47%	26%	27%	18%	9%
Turkey	79%	52%	27%	21%	15%	6%
South Africa	61%	42%	19%	39%	22%	17%
Japan	73%	35%	38%	27%	18%	9%
China	46%	13%	33%	54%	40%	14%
United States	62%	37%	25%	38%	19%	19%
Mexico	78%	49%	29%	22%	14%	8%
Brazil	83%	53%	30%	17%	8%	9%
18-COUNTRY AVERAGE	70%	43%	27%	30%	18%	12%

Which items of expenditure are you most concerned about limiting? Please select up to two answers.

To those who have put in place measures to limit the operating cost of their vehicle.

	Fuel (diesel, petrol, etc.)	Parking cost (car park rental, city centre parking, etc.)	Servicing and maintenance	Toll roads (motorways)	Insurance
Germany	63%	23%	24%	13%	24%
Austria	75%	15%	26%	10%	24%
Belgium	71%	35%	15%	20%	17%
Spain	68%	26%	27%	18%	23%
France	67%	30%	18%	37%	12%
Italy	68%	24%	26%	19%	30%
Norway	67%	22%	23%	22%	15%
Netherlands	68%	34%	15%	12%	18%
Poland	71%	22%	24%	20%	21%
Portugal	61%	24%	27%	28%	20%
United Kingdom	61%	24%	23%	12%	20%
Turkey	65%	22%	40%	21%	19%
South Africa	66%	19%	39%	17%	23%
Japan	49%	24%	25%	20%	32%
China	62%	30%	44%	17%	26%
United States	63%	16%	34%	16%	25%
Mexico	59%	28%	38%	20%	18%
Brazil	58%	43%	29%	20%	19%
18-COUNTRY AVERAGE	65%	26%	28%	20%	21%

In terms of fuel, what measures have you put in place to reduce this cost?

To those who have put in place measures to limit the operating cost of their vehicle. Several answers possible.

	Limiting your journeys	Comparing fuel prices and finding the cheapest petrol station to fill up at the best place and time	Optimising your driving: driving more slowly, more smoothly, freewheeling, avoiding traffic jams, etc.	Using an alternative means of transport when you can	Avoiding using certain fuel-intensive equipment, such as air conditioning	Choosing a fuel-efficient vehicle	Carpooling	Converting your car to ethanol (FlexFuel kit) or electric (retrofitting)	Other	You have not put any measures in place
Germany	51%	45%	45%	24%	24%	23%	15%	11%	2%	2%
Austria	58%	52%	56%	29%	26%	18%	15%	4%	3%	2%
Belgium	63%	46%	51%	33%	25%	17%	10%	5%	2%	2%
Spain	57%	51%	43%	41%	27%	15%	15%	6%	2%	2%
France	65%	46%	48%	29%	29%	15%	13%	6%	1%	3%
Italy	48%	48%	41%	33%	26%	22%	6%	6%	4%	3%
Norway	62%	43%	24%	25%	18%	22%	15%	9%	1%	1%
Netherlands	57%	49%	42%	36%	21%	17%	8%	6%	4%	4%
Poland	57%	43%	47%	43%	19%	26%	2%	5%	1%	4%
Portugal	63%	50%	51%	31%	34%	30%	11%	3%	2%	2%
United Kingdom	50%	39%	36%	28%	30%	18%	7%	10%	2%	3%
Turkey	45%	34%	44%	51%	46%	27%	22%	12%	2%	1%
South Africa	69%	34%	44%	47%	40%	27%	18%	7%	4%	2%
Japan	32%	43%	47%	19%	31%	35%	4%	5%	2%	4%
China	20%	43%	53%	43%	33%	29%	9%	21%	0%	1%
United States	54%	46%	37%	19%	21%	19%	14%	11%	2%	4%
Mexico	49%	49%	42%	43%	37%	27%	19%	4%	2%	1%
Brazil	54%	58%	37%	49%	43%	35%	5%	14%	2%	2%
18-COUNTRY AVERAGE	54%	46%	44%	36%	30%	23%	12%	8%	2%	2%

Have you put in place measures to limit the operating cost of your vehicle?

To those who have at least one car in their household

	Yes	No
Germany	50%	50%
Austria	49%	51%
Belgium	58%	42%
Spain	59%	41%
France	68%	32%
Italy	57%	43%
Norway	58%	42%
Netherlands	49%	51%
Poland	61%	39%
Portugal	64%	36%
United Kingdom	47%	53%
Turkey	78%	22%
South Africa	74%	26%
Japan	44%	56%
China	58%	42%
United States	51%	49%
Mexico	74%	26%
Brazil	74%	26%
18-COUNTRY AVERAGE	60%	40%

In terms of maintenance, what alternatives are you putting in place to reduce this cost?

To those who have put in place measures to limit the operating cost of their vehicle. Several answers possible.

	Carrying out maintenance and servicing with independent repairers rather than the manufacturer's network	Carrying out maintenance and servicing yourself or having a friend or relative do it	Limiting the maintenance and servicing of your vehicle		Carrying out maintenance and servicing informally (off the books)	You have not put any measures in place	
Germany	43%	28%	25%		17%	23%	Germany
Austria	32%	31%	18%		9%	28%	Austria
Belgium	26%	23%	21%		11%	37%	Belgium
Spain	47%	20%	23%		13%	22%	Spain
France	34%	30%	22%		10%	27%	France
Italy	43%	23%	26%		15%	21%	Italy
Norway	32%	32%	24%		19%	22%	Norway
Netherlands	28%	24%	19%		11%	40%	Netherlands
Poland	33%	27%	21%		12%	29%	Poland
Portugal	49%	25%	21%		17%	20%	Portugal
United Kingdom	33%	26%	24%		18%	25%	United Kingdom
Turkey	45%	38%	43%		21%	10%	Turkey
South Africa	47%	39%	31%		22%	16%	South Africa
Japan	34%	23%	27%		10%	31%	Japan
China	53%	45%	30%		28%	9%	China
United States	34%	40%	29%		18%	20%	United States
Mexico	52%	37%	22%		18%	10%	Mexico
Brazil	55%	32%	27%		19%	14%	Brazil
18-COUNTRY AVERAGE	41%	30%	25%		16%	22%	18-COUNTRY AVERAGE

In terms of your car insurance, what measures have you put in place to reduce this cost?

To those who have put in place measures to limit the operating cost of their vehicle. Several answers possible.

	Comparing different insurance policies to choose the best deal	Regularly renegotiating the price of your insurance	Parking your vehicle in a enclosed and secure area	Changing your insurance regularly whenever you find a better offer	Choosing third-party insurance rather than comprehensive insurance		Taking out tailor-made insurance (e.g. insurance per kilometre)	Increasing the excess to reduce the price of the insurance	Choosing an experienced driver with a bonus as the main driver	Driving without insurance	You have not put any measures in place	
Germany	27%	22%	24%	16%	18%		17%	14%	15%	10%	23%	Germany
Austria	25%	11%	12%	9%	25%		7%	7%	17%	3%	34%	Austria
Belgium	21%	13%	12%	9%	11%		16%	7%	8%	3%	43%	Belgium
Spain	29%	25%	15%	18%	21%		8%	12%	9%	4%	22%	Spain
France	21%	20%	17%	11%	15%		14%	7%	12%	2%	35%	France
Italy	43%	22%	15%	19%	21%		14%	7%	12%	3%	19%	Italy
Norway	22%	23%	14%	17%	10%		13%	15%	11%	5%	31%	Norway
Netherlands	19%	10%	7%	14%	16%		8%	8%	13%	2%	44%	Netherlands
Poland	41%	18%	16%	25%	33%		8%	7%	8%	4%	17%	Poland
Portugal	37%	34%	11%	21%	25%		0%	7%	7%	4%	19%	Portugal
United Kingdom	34%	25%	18%	26%	14%		9%	17%	12%	5%	20%	United Kingdom
Turkey	47%	24%	22%	27%	26%		0%	24%	0%	12%	12%	Turkey
South Africa	43%	28%	38%	18%	14%		21%	14%	13%	11%	11%	South Africa
Japan	46%	7%	10%	17%	6%		9%	13%	13%	5%	20%	Japan
China	33%	25%	19%	32%	21%		30%	25%	18%	6%	9%	China
United States	29%	19%	18%	21%	13%		10%	12%	16%	8%	30%	United States
Mexico	35%	12%	19%	18%	14%		18%	9%	8%	7%	19%	Mexico
Brazil	26%	26%	26%	18%	9%		16%	13%	8%	17%	17%	Brazil
18-COUNTRY AVERAGE	32%	21%	18%	19%	17%		12%	12%	11%	6%	23%	18-COUNTRY AVERAGE

To limit your car budget, have you reduced the number of vehicles in your household?

To those who have a car in their household or who already had one in the past.

	ST Yes or I am considering doing so	Yes	No, but I am considering doing so	No, and I probably won't do so
Germany	47%	23%	24%	53%
Austria	43%	18%	25%	57%
Belgium	40%	21%	19%	60%
Spain	52%	22%	30%	48%
France	44%	24%	20%	56%
Italy	53%	25%	28%	47%
Norway	50%	27%	23%	50%
Netherlands	38%	17%	21%	62%
Poland	54%	24%	30%	46%
Portugal	50%	28%	22%	50%
United Kingdom	45%	23%	22%	55%
Turkey	60%	32%	28%	40%
South Africa	61%	31%	30%	39%
Japan	33%	14%	19%	67%
China	60%	31%	29%	40%
United States	49%	24%	25%	51%
Mexico	57%	35%	22%	43%
Brazil	64%	45%	19%	36%
18-COUNTRY AVERAGE	50%	26%	24%	50%

In your opinion, which government measures could most limit the cost of buying and using a car?

To all. Up to two answers.

	Limiting the cost of fuel	Reducing taxes on cars	Developing public transport	Setting up or developing subsidies for the purchase of electric vehicles	Offering economical car leasing for low-income households	Lowering the maximum speed limit, to limit fuel consumption	Other
Germany	50%	34%	23%	14%	13%	20%	7%
Austria	56%	42%	22%	18%	14%	11%	4%
Belgium	55%	37%	25%	21%	11%	11%	5%
Spain	61%	39%	20%	31%	14%	8%	2%
France	59%	40%	19%	21%	12%	9%	5%
Italy	57%	39%	25%	27%	12%	10%	2%
Norway	49%	32%	24%	17%	16%	8%	6%
Netherlands	51%	32%	28%	19%	10%	10%	7%
Poland	58%	27%	28%	19%	15%	8%	4%
Portugal	43%	44%	27%	27%	15%	7%	4%
United Kingdom	49%	30%	22%	19%	17%	12%	5%
Turkey	57%	50%	15%	18%	15%	11%	1%
South Africa	64%	31%	24%	16%	21%	11%	2%
Japan	36%	49%	19%	22%	10%	7%	8%
China	36%	32%	36%	29%	22%	21%	3%
United States	52%	31%	15%	17%	22%	12%	7%
Mexico	51%	40%	19%	21%	26%	7%	2%
Brazil	45%	52%	27%	23%	15%	6%	3%
18-COUNTRY AVERAGE	52%	38%	23%	21%	16%	11%	4%

In your opinion, which measures taken by car brands could most limit the cost of buying and using a car?

To all. Up to two answers.

	Developing more fuel-efficient vehicles	Developing smaller, lighter vehicles	Limiting distribution costs, for example through online sales	Offering less well-equipped vehicles	Other
Germany	61%	40%	22%	13%	10%
Austria	68%	35%	20%	15%	8%
Belgium	61%	38%	19%	17%	9%
Spain	68%	23%	35%	19%	5%
France	61%	37%	20%	23%	8%
Italy	66%	27%	31%	21%	4%
Norway	56%	28%	16%	19%	15%
Netherlands	61%	38%	11%	12%	15%
Poland	67%	32%	22%	12%	7%
Portugal	69%	24%	24%	22%	10%
United Kingdom	60%	34%	26%	16%	8%
Turkey	62%	37%	24%	23%	5%
South Africa	70%	38%	31%	18%	3%
Japan	62%	33%	20%	15%	10%
China	60%	38%	39%	29%	4%
United States	53%	24%	32%	21%	12%
Mexico	69%	23%	35%	18%	4%
Brazil	72%	33%	22%	15%	8%
18-COUNTRY AVERAGE	64%	32%	25%	18%	8%

Do you fear that one day you will not be able to afford to own a car?

To those who have at least one car in their household

	ST Yes	Yes, definitely	Yes, to an extent	ST No	No, not really	No, not at all
Germany	61%	25%	36%	39%	29%	10%
Austria	55%	19%	36%	45%	37%	8%
Belgium	60%	25%	35%	40%	33%	7%
Spain	69%	20%	49%	31%	26%	5%
France	59%	21%	38%	41%	32%	9%
Italy	50%	12%	38%	50%	38%	12%
Norway	59%	28%	31%	41%	29%	12%
Netherlands	49%	14%	35%	51%	40%	11%
Poland	69%	24%	45%	31%	27%	4%
Portugal	71%	26%	45%	29%	24%	5%
United Kingdom	65%	30%	35%	35%	27%	8%
Turkey	85%	56%	29%	15%	11%	4%
South Africa	70%	37%	33%	30%	23%	7%
Japan	57%	15%	42%	43%	33%	10%
China	55%	14%	41%	45%	28%	17%
United States	57%	25%	32%	43%	29%	14%
Mexico	74%	34%	40%	26%	22%	4%
Brazil	71%	24%	47%	29%	24%	5%
18-COUNTRY AVERAGE	63%	25%	38%	37%	29%	8%

Let's imagine that you were no longer able to have a car. What would be the first thing on your mind?

To those who have at least one car in their household. Up to three answers.

	ST Positive consequences	The positive impact on the environment	The positive impact on your budget	The stress avoided by no longer driving	The increased safety; you would take fewer risks on the road		ST Negative consequences	The difficulties in getting around as you wish	The inconvenience of your journeys (longer, less comfortable journeys, etc.)	The image you will project, the feeling of downward social mobility	Other	
Germany	46%	22%	21%	10%	9%		74%	54%	45%	16%	7%	Germany
Austria	47%	20%	26%	10%	8%		78%	60%	46%	14%	5%	Austria
Belgium	44%	15%	24%	11%	9%		77%	59%	46%	11%	5%	Belgium
Spain	52%	21%	22%	14%	16%		78%	51%	53%	10%	2%	Spain
France	43%	17%	21%	11%	10%		80%	62%	50%	14%	5%	France
Italy	55%	28%	20%	17%	11%		76%	58%	40%	12%	2%	Italy
Norway	38%	10%	19%	12%	8%		80%	61%	38%	23%	5%	Norway
Netherlands	44%	18%	22%	10%	6%		78%	58%	45%	11%	7%	Netherlands
Poland	47%	20%	25%	13%	11%		77%	52%	47%	24%	3%	Poland
Portugal	47%	20%	26%	12%	6%		84%	70%	49%	6%	5%	Portugal
United Kingdom	55%	18%	23%	18%	12%		77%	58%	48%	13%	3%	United Kingdom
Turkey	52%	18%	21%	18%	12%		80%	56%	50%	23%	2%	Turkey
South Africa	59%	20%	30%	15%	17%		85%	67%	54%	17%	3%	South Africa
Japan	44%	16%	14%	9%	19%		77%	49%	55%	11%	5%	Japan
China	68%	29%	24%	22%	25%		79%	44%	50%	23%	2%	China
United States	53%	15%	19%	21%	13%		79%	60%	44%	15%	5%	United States
Mexico	53%	27%	20%	14%	13%		82%	61%	54%	8%	1%	Mexico
Brazil	58%	25%	32%	17%	11%		81%	65%	42%	17%	3%	Brazil
18-COUNTRY AVERAGE	50%	20%	23%	14%	12%		79%	58%	47%	15%	4%	18-COUNTRY AVERAGE

Would you be willing to give up owning a car for good?

To those who have at least one car in their household.

	ST Yes	Yes, definitely	Yes, probably	ST No	No, probably not	No, definitely not
Germany	31%	14%	17%	69%	31%	38%
Austria	22%	7%	15%	78%	37%	41%
Belgium	23%	8%	15%	77%	34%	43%
Spain	33%	7%	26%	67%	44%	23%
France	25%	7%	18%	75%	35%	40%
Italy	32%	7%	25%	68%	38%	30%
Norway	35%	11%	24%	65%	29%	36%
Netherlands	18%	3%	15%	82%	37%	45%
Poland	25%	6%	19%	75%	45%	30%
Portugal	27%	7%	20%	73%	44%	29%
United Kingdom	34%	10%	24%	66%	38%	28%
Turkey	26%	12%	14%	74%	43%	31%
South Africa	24%	9%	15%	76%	42%	34%
Japan	35%	6%	29%	65%	48%	17%
China	26%	6%	20%	74%	44%	30%
United States	28%	11%	17%	72%	30%	42%
Mexico	31%	7%	24%	69%	45%	24%
Brazil	36%	9%	27%	64%	40%	24%
18-COUNTRY AVERAGE	28%	8%	20%	72%	39%	33%