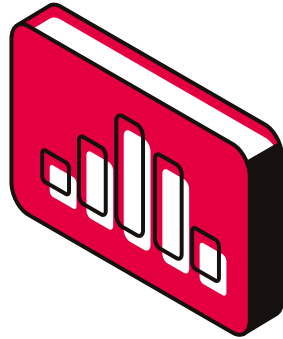
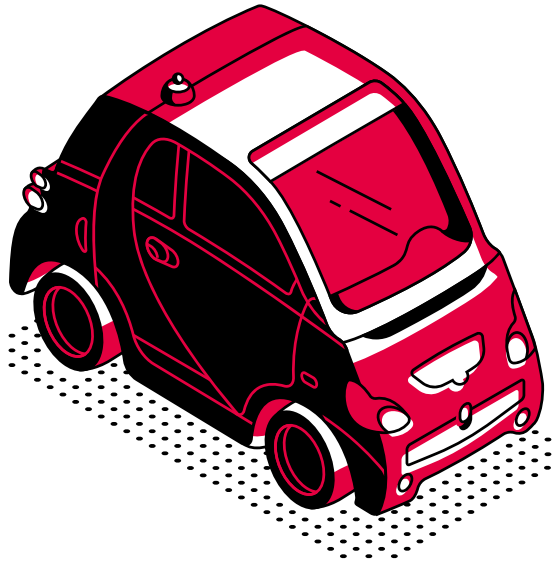


# ANNEX



**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 <sub>2</sub> 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%
<b>European average</b>	<b>83%</b>	<b>47%</b>	<b>16%</b>	<b>6%</b>	<b>2%</b>
<b>15-country average</b>	<b>85%</b>	<b>46%</b>	<b>16%</b>	<b>7%</b>	<b>2%</b>

### 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%
<b>European average</b>	<b>20%</b>	<b>37%</b>	<b>43%</b>	<b>19%</b>	<b>44%</b>	<b>37%</b>	<b>15%</b>	<b>52%</b>	<b>33%</b>
<b>15-country average</b>	<b>25%</b>	<b>37%</b>	<b>38%</b>	<b>22%</b>	<b>46%</b>	<b>32%</b>	<b>16%</b>	<b>55%</b>	<b>29%</b>

**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 <sub>2</sub> , 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%