**South Africa**

**The prevalence of cars**

- **2015 motorisation rate:** 17%
- **2019 Automotive Output:** 0.6 million vehicles (trend: +55%)
- **EV market share:** 21%

**Cars: an impossible divorce?**

- **Properties of respondents thinking this divorce...**
  - **POSSIBLE**
    - Believe that criticisms of cars are justified
    - Agree with taxes on polluting vehicles
    - Support a reduction in the space set aside for cars in cities

- **IMPOSSIBLE**
  - A personal relationship
  - A national relationship
  - A possible relationship

**A green and virtuous future?**

- **Proposition of respondents:**
  - 0%-27% wishing arrangements for soft modes to the detriment of the automobile
  - 96% seeing EV as a solution to global warming problems
  - 96% seeing EV as a way to secure the future of the automotive industry

**Energy source of the next vehicle purchased**

- 84% petrol
- 16% diesel
- 3% electric
- 1% hybrid
- 0% other / not sure yet

**Market forecast**

- **2019:** 3.53 million
- **2020:** 3.36% (-33%)
- **2021:** 4.14% (+13%)

**SYNTHESIS**

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

**Germany**

**The prevalence of cars**

- **2018 motorisation rate:** 64%
- **2019 Automotive Output:** 4.6 million vehicles (trend: +4%)
- **EV market share:** 2%

**Cars: an impossible divorce?**

- **Properties of respondents thinking this divorce...**
  - **POSSIBLE**
    - Believe that criticisms of cars are justified
    - Agree with taxes on polluting vehicles
    - Support a reduction in the space set aside for cars in cities

- **IMPOSSIBLE**
  - A personal relationship
  - A national relationship
  - A possible relationship

**A green and virtuous future?**

- **Proposition of respondents:**
  - 23% vs 34% the previous year
  - 59% seeing EV as a solution to global warming problems
  - 59% seeing EV as a way to secure the future of the automotive industry

**Energy source of the next vehicle purchased**

- 56% petrol
- 19% diesel
- 19% electric
- 6% hybrid
- 0% other / not sure yet

**Market forecast**

- **2019:** 4.01 million
- **2020:** 3.33% (-22%)
- **2021:** 3.47% (+8%)

**SYNTHESIS**

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

**Belgium**

- **2018 motorisation rate**: 589 vehicles per 1,000 inhabitants (ranked 14th)
- **2019 Automotive Output**: 0.3 million vehicles (ranked 24th)
- **EV market share**: 13% (2018) vs. 15% (2019)
- **Proportion who like and love cars**: 46% vs. 49%
- **Purchasing intentions in the next 12 months**: 15% (previous year: 24%)

**Cars: an impossible divorce?**

- **Belgium**
  - **Properties of respondents thinking this divorce…**
    - **IMPOSSIBLE**
      - Believe that criticisms of cars are justified: 61%
      - A personal relationship: 72%
      - A national relationship: 64%
      - Energy source of the next vehicle purchased: Petrol: 30%, Diesel: 14%, Electric: 33%, Hybrid: 0%
      - A green and virtuous future?
    - **POSSIBLE**
      - Agree with taxes on polluting vehicles: 81%
      - Support a reduction in the space set aside for cars in cities: 54%
      - Consider that the government does not support the automotive industry sufficiently: 33%

**Brazil**

- **2015 motorisation rate**: 206 vehicles per 1,000 inhabitants (ranked 15th)
- **2019 Automotive Output**: 2.9 million vehicles
- **EV market share**: 15%
- **Proportion who like and love cars**: 49%
- **Purchasing intentions in the next 12 months**: 51% (previous year: 68%)

**Cars: an impossible divorce?**

- **Brazil**
  - **Properties of respondents thinking this divorce…**
    - **IMPOSSIBLE**
      - Believe that criticisms of cars are justified: 68%
      - A personal relationship: 87%
      - A national relationship: 52%
      - Energy source of the next vehicle purchased: Petrol: 45%, Diesel: 19%, Electric: 18%, Hybrid: 0%
    - **POSSIBLE**
      - Agree with taxes on polluting vehicles: 75%
      - Support a reduction in the space set aside for cars in cities: 71%
      - Consider that the government does not support the automotive industry sufficiently: 35%

**SYNTHESIS**

**Belgium**

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

**Brazil**

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

Sources: * OICA - ACEA (European Countries) / IEA (Others Countries) * OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.
### China

#### The prevalence of cars

**2015 motorisation rate**
- 11% vehicles per 1,000 inhabitants (World: 166)

**2019 Automotive Output**
- 25.7 millions of vehicles (ranked 2nd/15*)

#### Cars: an impossible divorce?

**Properties of respondents thinking this divorce...**
- **POSSIBLE**
  - Believe that criticisms of cars are justified
  - A personal relationship
  - A national relationship

**IMPOSSIBLE**
- Agree with taxes on polluting vehicles
- Feel protected when they are in a car
- Support a reduction in the space set aside for cars in cities

#### A green and virtuous future?

**Proportion of respondents...**
- Believing that arrangements for soft modes to the detriment of the automobile
- Seeing EV as a solution to global warming problems
- Seeing EV as a way to secure the future of the automotive industry

**Energy source of the next vehicle purchased**
- Petrol
- Diesel
- Electric
- Hybrid
- Other / Not sure yet

#### Synthesis

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

### Spain

#### The prevalence of cars

**2018 motorisation rate**
- 629 millions of vehicles (World: 182)

**2019 Automotive Output**
- 2.8 millions of vehicles (ranked 6th/15*)

#### Cars: an impossible divorce?

**Properties of respondents thinking this divorce...**
- **POSSIBLE**
  - Believe that criticisms of cars are justified
  - A personal relationship
  - A national relationship

**IMPOSSIBLE**
- Agree with taxes on polluting vehicles
- Feel protected when they are in a car
- Support a reduction in the space set aside for cars in cities

#### A green and virtuous future?

**Proportion of respondents...**
- Believing that arrangements for soft modes to the detriment of the automobile
- Seeing EV as a solution to global warming problems
- Seeing EV as a way to secure the future of the automotive industry

**Energy source of the next vehicle purchased**
- Petrol
- Diesel
- Electric
- Hybrid
- Other / Not sure yet

#### Synthesis

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

**United States**

- **2015 motorisation rate**: 821 vehicles per 1,000 inhabitants (World: 216)
- **2019 Automotive Output**: 10.9 millions of vehicles (ranked 2nd/15*)
- **Proportion who like and love cars**: 64%
- **Monthly variation in new passenger vehicle sales**: +3% vs. 2018
- **Market forecast**: 2019: 17.5 million; 2020: 14.3 million (+18%); 2021: 15.6 million (+9%)

**The prevalence of cars**

**France**

- **2018 motorisation rate**: 596 vehicles per 1,000 inhabitants (World: 216)
- **2019 Automotive Output**: 22 millions of vehicles (ranked 7th/15*)
- **Proportion who like and love cars**: 59%
- **Monthly variation in new passenger vehicle sales**: +26% vs. 2018
- **Market forecast**: 2019: 29.1 million; 2020: 20.0 million (-27%); 2021: 20.2 million (+13%)

### Synthesis

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

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

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**The prevalence of cars**

### Italy

2018 motorisation rate\(^1\)

<table>
<thead>
<tr>
<th>Type of Vehicle</th>
<th>Number of Vehicles per 1,000 Inhabitants (Fleet 2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol</td>
<td>660*</td>
</tr>
<tr>
<td>Diesel</td>
<td>280*</td>
</tr>
<tr>
<td>Electric</td>
<td>150*</td>
</tr>
<tr>
<td>Hybrid</td>
<td>40*</td>
</tr>
<tr>
<td>Other / Not sure yet</td>
<td>10*</td>
</tr>
</tbody>
</table>

**2019 Automotive Output\(^1\)**

<table>
<thead>
<tr>
<th>Type of Vehicle</th>
<th>Output (in thousands of vehicles)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol</td>
<td>360*</td>
</tr>
<tr>
<td>Diesel</td>
<td>180*</td>
</tr>
<tr>
<td>Electric</td>
<td>90*</td>
</tr>
<tr>
<td>Hybrid</td>
<td>30*</td>
</tr>
<tr>
<td>Other / Not sure yet</td>
<td>10*</td>
</tr>
</tbody>
</table>

**EV market share**

- **Proportion who like and love cars**: 46% vs. 2018 (18%) & 2020 (22%)
- **Purchasing intentions in the next 12 months**: 2019: 60% vs. 2018: 46% & 2020: 42%

**Energy source of the next vehicle purchased**

- **Petrol**: 34%
- **Diesel**: 14%
- **Electric**: 4%
- **Hybrid**: 4%
- **Other / Not sure yet**: 2% (2018), 4% (2019), 3% (2020)

**Market forecast\(^1\)** (in millions of EVs)

- **2019**: 2,130
- **2020**: 2,310
- **2021**: 2,480 (+18%)

---

**Cars: an impossible divorce?**

### Properties of respondents thinking this divorce possible

- **Believe that critics of cars are justified**: 49%
- **Agree with taxes on polluting vehicles**: 40%
- **Feel protected when they are in a car**: 36%
- **Support a reduction in the space set aside for cars in cities**: 35%
- **Consider that the government does not support the automotive industry sufficiently**: 34%

### Properties of respondents thinking this divorce impossible

- **IMPOSSIBLE**: 51%

---

**A green and virtuous future?**

**Proportion of respondents**

- **Wishing arrangements for soft modes to the detriment of the automobile**: 44%
- **Seeing EV as a solution to global warming problems**: 52%
- **Seeing EV as a way to secure the future of the automotive industry**: 37%

**Energy source of the next vehicle purchased**

- **Petrol**: 11%
- **Diesel**: 3%
- **Electric**: 9%
- **Hybrid**: 16%
- **Other / Not sure yet**: 8% (2018), 3% (2019), 1% (2020)

---

**Synthesis**

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

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**Source**: L’Observatoire Cetelem

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\(^1\) *Countries of L’Observatoire Cetelem.*

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**The prevalence of cars**

### Japan

2018 motorisation rate\(^1\)

<table>
<thead>
<tr>
<th>Type of Vehicle</th>
<th>Number of Vehicles per 1,000 Inhabitants (Fleet 2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol</td>
<td>810*</td>
</tr>
<tr>
<td>Diesel</td>
<td>320*</td>
</tr>
<tr>
<td>Electric</td>
<td>180*</td>
</tr>
<tr>
<td>Hybrid</td>
<td>40*</td>
</tr>
<tr>
<td>Other / Not sure yet</td>
<td>10*</td>
</tr>
</tbody>
</table>

**2019 Automotive Output\(^1\)**

<table>
<thead>
<tr>
<th>Type of Vehicle</th>
<th>Output (in thousands of vehicles)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petrol</td>
<td>470*</td>
</tr>
<tr>
<td>Diesel</td>
<td>190*</td>
</tr>
<tr>
<td>Electric</td>
<td>100*</td>
</tr>
<tr>
<td>Hybrid</td>
<td>20*</td>
</tr>
<tr>
<td>Other / Not sure yet</td>
<td>10*</td>
</tr>
</tbody>
</table>

**EV market share**

- **Proportion who like and love cars**: 11% vs. 2018 (27%) & 2020 (23%)
- **Purchasing intentions in the next 12 months**: 2019: 58% vs. 2018: 46% & 2020: 44%

**Energy source of the next vehicle purchased**

- **Petrol**: 54%
- **Diesel**: 18%
- **Electric**: 33%
- **Hybrid**: 11%
- **Other / Not sure yet**: 2% (2018), 3% (2019), 1% (2020)

**Market forecast\(^1\)** (in millions of EVs)

- **2019**: 2,130
- **2020**: 2,310
- **2021**: 2,510 (+16%)

---

**Cars: an impossible divorce?**

### Properties of respondents thinking this divorce possible

- **Believe that critics of cars are justified**: 74%
- **Agree with taxes on polluting vehicles**: 58%
- **Feel protected when they are in a car**: 61%
- **Support a reduction in the space set aside for cars in cities**: 60%
- **Consider that the government does not support the automotive industry sufficiently**: 61%

### Properties of respondents thinking this divorce impossible

- **IMPOSSIBLE**: 26%

---

**A green and virtuous future?**

**Proportion of respondents**

- **Wishing arrangements for soft modes to the detriment of the automobile**: 34%
- **Seeing EV as a solution to global warming problems**: 82%
- **Seeing EV as a way to secure the future of the automotive industry**: 61%

**Energy source of the next vehicle purchased**

- **Petrol**: 10%
- **Diesel**: 11%
- **Electric**: 82%
- **Hybrid**: 8%
- **Other / Not sure yet**: 1% (2018), 2% (2019), 2% (2020)

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**Synthesis**

While Japan is one of the countries where motoring is viewed as a utilitarian necessity, the Japanese see their cars as utilitarian items. The country’s automotive industry is highly developed and well supported by its inhabitants. Purchasing intentions for electric and hybrid vehicles are significantly higher than in other countries.

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**Source**: L’Observatoire Cetelem

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\(^1\) *Countries of L’Observatoire Cetelem.*
**CARS: AN IMPOSSIBLE DIVORCE?**

<table>
<thead>
<tr>
<th>Country</th>
<th>Possible</th>
<th>Impossible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Netherlands</strong></td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td><strong>Poland</strong></td>
<td>62%</td>
<td>38%</td>
</tr>
</tbody>
</table>

*Proportion of respondents thinking this divorce...*

**A green and virtuous future?**

<table>
<thead>
<tr>
<th>Country</th>
<th>POSSIBLE</th>
<th>POSSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Netherlands</strong></td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Poland</strong></td>
<td>69%</td>
<td>31%</td>
</tr>
</tbody>
</table>

*Proportion of respondents.*

**Market forecast**

<table>
<thead>
<tr>
<th>Country</th>
<th>2019 (in millions of NPV)</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Netherlands</strong></td>
<td>0.49 (vs. 2019)</td>
<td>0.46 (vs. 2019)</td>
<td>0.46 (vs. 2019)</td>
</tr>
<tr>
<td><strong>Poland</strong></td>
<td>0.66 (vs. 2019)</td>
<td>0.63 (vs. 2019)</td>
<td>0.63 (vs. 2019)</td>
</tr>
</tbody>
</table>

*In millions of NPV.*

**SYNTHESIS**

The land of bicycles already places a strong emphasis on sustainable modes of travel. Thus, the Dutch are less inclined to further reduce the presence of cars so as to develop these alternative forms of transport. The vast majority of respondents in the Netherlands (82%) believe that the current dominant mode of transport, i.e., cars, is a personal relationship while only 18% feel it is a national relationship.

**The prevalence of cars**

- **Netherlands**
  - 2018 motorisation rate: 580 vehicles per 1,000 inhabitants (World: 182)
  - 2019 Automotive Output: 0.3 million vehicles (versus 1.7 in 2017)
  - EV market share: 3% (In thousands of vehicles)
  - Proportion who like and love cars: 15% vs. 31% the previous year
  - Monthly variation in new passenger vehicle sales: 18% vs. 31% the previous year
  - Energy source of the next vehicle purchased: Petrol 64%, Diesel 28%, Electric 8%, Hybrid 1%, Other/Not sure yet 1%
  - Market forecast: 0.46 (vs. 2019)

- **Poland**
  - 2018 motorisation rate: 719 vehicles per 1,000 inhabitants (World: 182)
  - 2019 Automotive Output: 0.6 million vehicles (versus 2.5 in 2017)
  - EV market share: 12% (In thousands of vehicles)
  - Proportion who like and love cars: 13% vs. 15% the previous year
  - Monthly variation in new passenger vehicle sales: 31% vs. 44% the previous year
  - Energy source of the next vehicle purchased: Petrol 87%, Diesel 7%, Electric 1%, Hybrid 3%, Other/Not sure yet 1%
  - Market forecast: 0.66 (vs. 2019)

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

**SYNTHESIS**

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

2018 motorisation rate 1
610 vehicles per 1,000 inhabitants (world avg)

2019 Automotive Output 1
0.3 million vehicles (-ranked 23rd/15*)

EV market share
Portugal

Proportion who like and love cars

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

Monthly variation in new passenger vehicle sales 1
(In thousands of vehicles)

Market forecast 1
(No millions of NPV)

Cars: an impossible divorce?

Property of respondents thinking this divorce...

A personal relationship

A national relationship

Support a reduction in the space set aside for cars in cities

POSSIBLE

IMPOSSIBLE

Believe that criticisms of cars are justified

Fund the domestic automotive industry

Feel protected when they are in a car

Consider that the government does not support the automotive industry sufficiently

Proportion of respondents thinking this divorce...

Wishing arrangements for soft modes to the detriment of the automobile

Seeing EV as a solution to global warming problems

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

Energy source of the next vehicle purchased

SYNTHESIS

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

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

The prevalence of cars

2018 motorisation rate 1
603 vehicles per 1,000 inhabitants (world avg)

2019 Automotive Output 1
1.4 million vehicles (-ranked 9th/15*)

EV market share

Proportion who like and love cars

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

Monthly variation in new passenger vehicle sales 1
(In thousands of vehicles)

Market forecast 1
(No millions of NPV)

Cars: an impossible divorce?

Property of respondents thinking this divorce...

A personal relationship

A national relationship

Support a reduction in the space set aside for cars in cities

POSSIBLE

IMPOSSIBLE

Believe that criticisms of cars are justified

Fund the domestic automotive industry

Feel protected when they are in a car

Consider that the government does not support the automotive industry sufficiently

Proportion of respondents thinking this divorce...

Wishing arrangements for soft modes to the detriment of the automobile

Seeing EV as a solution to global warming problems

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

Energy source of the next vehicle purchased

SYNTHESIS

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

* Countries of Cetelem Observatoire
Sources: 1 OICA. 2 ACEA (European Countries) / IEA (Others Countries). 3 OICA (until August 2020) / ACEA and national federations (September 2020) / Forecast 2020: C-Ways.
Turkey stands apart this year: it is the only country in the world to have seen significant growth in the sector in 2020, having made up ground lost during the 2019 economic crisis, when the market collapsed. While the motorisation rate remains low in Turkey and its auto industry is still developing, its inhabitants already believe that cars have too much of a presence and would like to see this reduced.

**Synthesis**

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