

opinionway,

— FOR —

aramisauto

The expectations of Europeans regarding mobility

Executive report | May 2026





Methodology

opinionway

Crédits : dev-asongbam

Methodology

Any publication, whether in full or in part, must include the following full statement:

“OpinionWay survey for AramisAuto”

and no reproduction of the survey may be separated from this title.



Survey conducted among **7,036 motorists; drawn from a sample of 9,000 people** in the following countries:



France
1,000 people



United Kingdom
1,000 people



Germany
1,021 people



Austria
1,014 people



Belgium
1,001 people



Italy
1,000 people



Spain
1,000 people



The samples were selected using **the quota method**, based on criteria such as gender, age, socio-professional category or income level, region of residence, and type of urban area.



The samples were surveyed using a **self-administered online questionnaire via a CAWI** (Computer Assisted Web Interview) **system**.



The interviews were conducted **between 14 and 23 April 2026**.

To thank them for their participation, panellists received incentives or made a donation to the charity of their choice.



OpinionWay conducted this survey in accordance with the procedures and rules of the **ISO 20252 standard**



The results of this survey should be interpreted taking into account the margins of uncertainty: **0.5 to 1.2 percentage point at most** for a sample of 7,000 respondents, and **1.4 to 3.1 percentage points at most** for a sample of 1,000 respondents.



Profile of the samples

opinionway

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Profile of the sample France

French motorists aged 18 and over.

Source: INSEE



 Gender	%
Men	49%
Women	51%
 Age	%
18 to 24 years	8%
25 to 34 years	15%
35 to 49 years	25%
50 to 64 years	26%
65 and over	26%
 Region	%
Ile-de-France	14%
Nord-ouest	24%
Nord-est	24%
Sud-ouest	12%
Sud-est	26%

 Employment	%
Higher socio-professional categories	31%
Farmers / Craftsmen / Traders / Business owners	5%
Professionals / Managers	10%
Middle-level professions	16%
Working classes (low-income households)	31%
Employees	18%
Manual workers	13%
Not in employment	38%
Retired	27%
Other economically inactive people	11%
 Urban area size	%
A rural municipality	24%
2,000 to 19,999 inhabitants	19%
20,000 to 99,999 inhabitants	15%
100,000 inhabitants and over	30%
Greater Paris	12%

Profile of the sample

United Kingdom

British motorists aged 18 and over.



Gender

%

Men	50%
Women	50%



Age

%

18 to 24 years	11%
25 to 34 years	18%
35 to 49 years	27%
50 to 64 years	22%
65 and over	22%



Region

%

South East & Anglia	25%
Midlands	17%
Greater London	12%
North & Yorkshire	13%
North West	11%
Northern Ireland	3%
Scotland	7%
South West & Wales	12%



Urban area size

%

Urban	58%
Suburban	30%
Rural, small town	12%



Employment

%

WORKING	65%
Managers and professionals, clerical staff	26%
Technicians, staff	27%
Manual workers	12%
NOT IN THE WORKFORCE	35%

Profile of the sample

Germany

German motorists aged 18 and over.



Gender

%

Men	51%
Women	49%



Age

%

18 to 24 years	9%
25 to 34 years	17%
35 to 49 years	26%
50 to 64 years	25%
65 and over	23%



Region

%

North-West: Hamburg, Bremen, Schleswig-Holstein, Lower Saxony	15%
North Rhine-Westphalia	22%
Central-West: Hesse, Rhineland-Palatinate, Saarland	14%
South-West: Baden-Württemberg	13%
South-East: Bavaria	16%
Eastern Region: Berlin, Mecklenburg-Western Pomerania, Brandenburg, Saxony-Anhalt, Thuringia, Saxony	20%



Urban area size

%

Urban	37%
Suburban	27%
Rural, small town	36%



Employment

%

Working	75%
Managers and professionals, office staff	31%
Technicians, employees	35%
Manual workers	9%
Not in employment	25%

Profile of the sample

Austria

Austrian motorists aged 18 and over.



Gender

%

Men	50%
Women	50%



Age

%

18 to 24 years	11%
25 to 34 years	17%
35 to 49 years	28%
50 to 64 years	34%
65 and over	10%



Region

%

Burgenland	4%
Kärnten	7%
Niederösterreich	21%
Oberösterreich	19%
Salzburg	5%
Steiermark	15%
Tirol	9%
Vorarlberg	4%
Wien	16%



Metropolitan area size

%

Urban	36%
Suburban	18%
Rural, small town	46%



Employment status

%

Working	79%
Managers and professionals, office staff	29%
Technicians, clerical staff	39%
Manual workers	11%
Not in work	21%

Profile of the sample

Belgium

Belgian motorists aged 18 and over.



Gender

%

Men	52%
Women	48%



Age

%

18 to 24 years	10%
25 to 34 years	15%
35 to 49 years	25%
50 to 64 years	26%
65 and over	24%



Region

%

Flemish Region	60%
Brussels-Capital Region	9%
Walloon Region	31%



Urban area size

%

Urban	11%
Suburban	55%
Rural, small town	34%



Employment status

%

Working	55%
Managers and professionals, office staff	18%
Technicians, clerical staff	22%
Manual workers	15%
Not in employment	45%

Profile of the sample *Italy*

Italian motorists aged 18 and over.



Gender

%

Men	51%
Women	49%



Age

%

18 to 24 years	8%
25 to 34 years	13%
35 to 49 years	29%
50 to 64 years	24%
65 and over	26%



Region

%

Nord-Ovest	28%
Nord-Est	19%
Centro	19%
Sud	23%
Isole	11%



Urban area size

%

Urban	25%
Suburban	41%
Rural, small town	34%



Employment status

%

Working	48%
Managers and professionals, office staff	8%
Technicians, clerical staff	23%
Manual workers	17%
Not in employment	52%

Profile of the sample

Spain

Spanish motorists aged 18 and over.



Gender

	%
Men	53%
Women	47%

Age

	%
18 to 24 years	8%
25 to 34 years	15%
35 to 49 years	28%
50 to 64 years	26%
65 and over	23%

Region

	%
Noroeste	8%
Noreste	9%
Comunidad de Madrid	14%
Centro	13%
Este	28%
Sur	23%
Canarias	5%

Urban area size

	%
Urban	74%
Suburban	13%
Rural, small town	13%

Employment status

	%
Working	73%
Managers and professionals, office staff	24%
Technicians, clerical staff	37%
Manual workers	12%
Inactive	27%



Results

opinionway

Crédits : adobe stock

1



*The impact of
budget constraints
on travel*

“Perceptions regarding the cost of travel

Q. Do you agree or disagree with each of the following statements?

New question

☒ Strongly agree

☐ Agree



Total
7,036 motorists



France
1,000 motorists



United Kingdom
1,000 motorists



Germany
1,021 motorists



Austria
1,014 motorists



Belgium
1,001 motorists



Italy
1,000 motorists



Spain
1,000 motorists

Agree with all statements

42%

48%

39%

41%

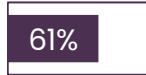
39%

41%

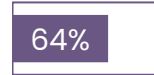
46%

37%

Getting around is becoming increasingly expensive



95%



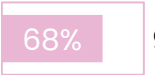
96%



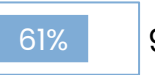
93%



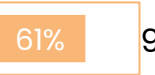
95%



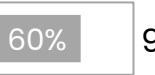
96%



95%

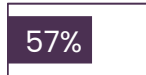


98%



96%

International tensions will have a lasting impact on fuel prices



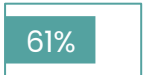
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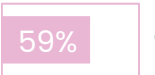
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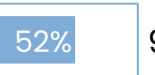
94%



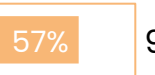
92%



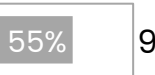
92%



94%

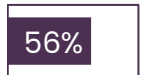


95%

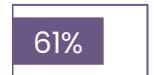


96%

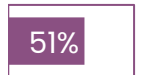
Without a car, you wouldn't be able to get around as you'd like



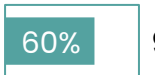
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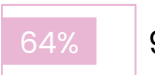
91%



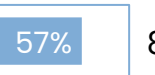
85%



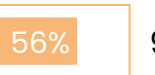
90%



90%



89%



91%



80%

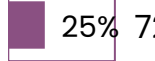
Owning a private car has become a luxury



80%



86%



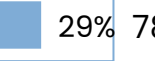
72%



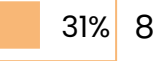
79%



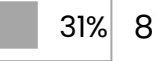
81%



78%

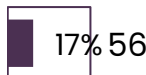


82%

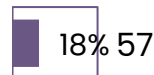


81%

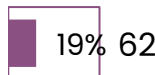
Your car is the biggest expense in your budget



56%



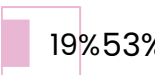
57%



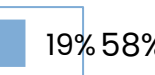
62%



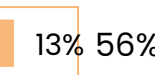
56%



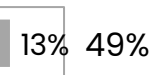
53%



58%



56%



49%



Perceptions regarding the cost of travel



France
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	48%	44%	52%	61%	50%	58%	48%	32%	55%	37%	51%	46%
Getting around is becoming increasingly expensive	96%	97%	97%	92%	94%	96%	99%	97%	96%	96%	96%	96%
International tensions will have a lasting impact on fuel prices	96%	97%	96%	94%	93%	97%	96%	99%	96%	98%	96%	97%
Without a car, you wouldn't be able to get around as you'd like	91%	90%	92%	91%	85%	89%	96%	91%	91%	91%	89%	92%
Owning a private car has become a luxury	86%	83%	89%	89%	87%	92%	88%	78%	89%	81%	91%	84%
Your car is the biggest expense in your budget	57%	54%	60%	78%	67%	67%	53%	40%	64%	47%	62%	55%



Perceptions regarding the cost of travel



France
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	48%	43%	49%	53%	43%	47%	53%	49%	44%	55%	31%
Getting around is becoming increasingly expensive	96%	97%	96%	97%	95%	97%	95%	97%	96%	97%	95%
International tensions will have a lasting impact on fuel prices	96%	98%	96%	97%	95%	97%	95%	96%	98%	97%	96%
Without a car, you wouldn't be able to get around as you'd like	91%	78%	92%	93%	96%	93%	95%	93%	86%	93%	87%
Owning a private car has become a luxury	86%	88%	89%	88%	84%	81%	85%	87%	86%	87%	84%
Your car is the biggest expense in your budget	57%	57%	56%	62%	48%	59%	60%	57%	56%	65%	39%



Perceptions regarding the cost of travel



United Kingdom
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	39%	34%	43%	37%	38%	43%	38%	35%	40%	36%	45%	36%
International tensions will have a lasting impact on fuel prices	94%	94%	95%	92%	93%	96%	92%	97%	94%	95%	93%	95%
Getting around is becoming increasingly expensive	93%	90%	95%	83%	89%	94%	99%	93%	92%	94%	95%	92%
Without a car, you wouldn't be able to get around as you'd like	85%	83%	86%	71%	80%	88%	88%	90%	83%	88%	84%	85%
Owning a private car has become a luxury	72%	70%	73%	90%	79%	71%	67%	62%	74%	68%	79%	69%
Your car is the biggest expense in your budget	62%	56%	67%	63%	57%	65%	65%	55%	63%	58%	71%	58%



Perceptions regarding the cost of travel



United Kingdom
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	39%	42%	41%	39%	43%	28%	41%	33%	36%	39%	39%	41%	32%
International tensions will have a lasting impact on fuel prices	94%	95%	93%	98%	95%	94%	84%	97%	95%	94%	95%	95%	92%
Getting around is becoming increasingly expensive	93%	95%	95%	87%	96%	90%	95%	89%	96%	95%	91%	92%	93%
Without a car, you wouldn't be able to get around as you'd like	85%	88%	82%	81%	93%	76%	85%	84%	94%	89%	81%	87%	79%
Owning a private car has become a luxury	72%	65%	81%	76%	66%	70%	69%	76%	62%	67%	77%	71%	74%
Your car is the biggest expense in your budget	62%	58%	65%	59%	70%	55%	72%	58%	54%	62%	62%	65%	53%



Perceptions regarding travel costs



Germany
1021
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	41%	38%	44%	40%	43%	49%	40%	31%	43%	34%	42%	41%
Getting around is becoming increasingly expensive	95%	95%	95%	88%	92%	95%	98%	96%	94%	96%	95%	94%
International tensions will have have a lasting impact on fuel prices	92%	93%	91%	83%	86%	92%	95%	96%	91%	94%	91%	92%
Without a car, you wouldn't be able to get around as you'd like	90%	91%	90%	87%	89%	86%	93%	93%	90%	91%	86%	93%
Owning a private car has become a luxury	79%	74%	84%	81%	83%	87%	76%	71%	81%	75%	81%	79%
Your car is the biggest expense in your budget	56%	53%	60%	71%	67%	62%	51%	39%	60%	44%	60%	55%



Perceptions regarding travel costs



Germany
1021
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION						TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	41%	41%	38%	41%	41%	37%	48%	39%	41%	43%	45%	32%
Getting around is becoming increasingly expensive	95%	95%	96%	93%	91%	96%	97%	95%	95%	95%	96%	94%
International tensions will have a lasting impact on fuel prices	92%	92%	88%	90%	89%	95%	95%	91%	92%	91%	91%	91%
Without a car, you wouldn't be able to get around as you'd like	90%	89%	86%	91%	90%	94%	91%	95%	91%	85%	92%	85%
Owning a private car has become a luxury	79%	83%	76%	78%	80%	74%	84%	74%	80%	84%	80%	78%
Your car is the biggest expense in your budget	56%	54%	61%	52%	58%	48%	59%	52%	54%	61%	60%	46%



Perceptions regarding the cost of travel



Austria
1014
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	39%	38%	40%	41%	50%	42%	35%	25%	42%	30%	40%	39%
Getting around is becoming increasingly expensive	96%	94%	98%	95%	93%	93%	99%	97%	96%	96%	94%	96%
International tensions will have a lasting impact on fuel prices	92%	93%	92%	86%	92%	92%	94%	96%	92%	94%	89%	94%
Without a car, you wouldn't be able to get around as you'd like	90%	90%	90%	80%	90%	93%	91%	93%	90%	91%	86%	90%
Owning a private car has become a luxury	81%	78%	84%	86%	87%	85%	78%	66%	83%	75%	85%	80%
Your car is the biggest expense in your budget	53%	52%	54%	70%	67%	54%	46%	30%	56%	42%	62%	50%



Perceptions regarding the cost of travel



Austria
1014
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION										TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder- österreich	Ober- österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week	
Agree with all statements	39%	32%	39%	33%	42%	46%	42%	48%	36%	36%	41%	37%	38%	42%	3%	
Getting around is becoming increasingly expensive	96%	100%	94%	93%	95%	100%	94%	96%	100%	97%	97%	94%	95%	96%	96%	
International tensions will have a lasting impact on fuel prices	92%	95%	90%	93%	92%	92%	92%	95%	91%	93%	95%	94%	89%	93%	91%	
Without a car, you wouldn't be able to get around as you'd like	90%	92%	92%	91%	90%	94%	95%	95%	81%	82%	96%	89%	83%	93%	84%	
Owning a private car has become a luxury	81%	74%	77%	81%	80%	87%	76%	88%	86%	83%	81%	78%	83%	81%	82%	
Your car is the biggest expense in your budget	53%	46%	58%	44%	57%	57%	55%	59%	51%	52%	52%	54%	54%	55%	48%	

“Perceptions regarding travel costs



Belgium
1001
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	41%	38%	45%	38%	48%	44%	44%	34%	46%	36%	48%	39%
Getting around is becoming increasingly expensive	95%	94%	96%	82%	92%	96%	99%	99%	93%	98%	93%	96%
International tensions will have a lasting impact on fuel prices	94%	96%	93%	87%	92%	95%	95%	98%	94%	95%	91%	96%
Without a car, you wouldn't be able to get around as you'd like	89%	86%	91%	79%	87%	89%	91%	91%	89%	89%	88%	88%
Owning a private car has become a luxury	78%	76%	81%	81%	81%	82%	76%	73%	79%	77%	80%	78%
Your car is the biggest expense in your budget	58%	52%	63%	80%	71%	57%	56%	40%	64%	50%	71%	54%



Perceptions regarding the cost of travel



Belgium
1001
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION			TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	41%	39%	42%	45%	44%	40%	41%	45%	35%
Getting around is becoming increasingly expensive	95%	96%	89%	97%	96%	95%	95%	96%	94%
International tensions will have a lasting impact on fuel prices	94%	94%	95%	94%	95%	94%	94%	94%	95%
Without a car, you wouldn't be able to get around as you'd like	89%	87%	75%	95%	92%	88%	78%	92%	83%
Owning a private car has become a luxury	78%	76%	77%	81%	80%	76%	77%	80%	75%
Your car is the biggest expense in your budget	58%	55%	71%	58%	55%	57%	65%	61%	52%



Perceptions regarding the cost of travel



Italy
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	46%	41%	52%	56%	49%	42%	52%	41%	45%	47%	52%	39%
Getting around is becoming increasingly expensive	98%	98%	97%	100%	97%	97%	97%	99%	97%	99%	98%	97%
International tensions will have a lasting impact on fuel prices	95%	95%	95%	97%	97%	92%	95%	97%	93%	97%	96%	95%
Without a car, you wouldn't be able to get around as you'd like	91%	92%	90%	90%	87%	91%	91%	93%	91%	92%	89%	93%
Owning a private car has become a luxury	82%	78%	87%	88%	83%	80%	88%	77%	82%	82%	86%	78%
Your car is the biggest expense in your budget	56%	52%	61%	71%	63%	51%	62%	48%	56%	57%	63%	49%



Perceptions regarding the cost of travel



Italy
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	46%	40%	42%	48%	54%	50%	40%	54%	42%	47%	42%
Getting around is becoming increasingly expensive	98%	98%	99%	96%	98%	97%	98%	98%	97%	98%	97%
International tensions will have a lasting impact on fuel prices	95%	95%	95%	93%	98%	95%	95%	95%	96%	95%	94%
Without a car, you wouldn't be able to get around as you'd like	91%	89%	94%	94%	90%	89%	95%	92%	85%	92%	88%
Owning a private car has become a luxury	82%	78%	79%	85%	87%	83%	79%	87%	79%	83%	82%
Your car is the biggest expense in your budget	56%	50%	51%	58%	66%	58%	49%	63%	55%	57%	54%



Perceptions regarding the cost of travel



Spain
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Agree with all statements	37%	30%	44%	55%	44%	43%	35%	22%	40%	30%	44%	33%
Getting around is becoming increasingly expensive	96%	96%	95%	92%	95%	96%	97%	96%	95%	98%	96%	96%
International tensions will have a lasting impact on fuel prices	96%	95%	96%	97%	92%	97%	97%	95%	96%	95%	95%	97%
Owning a private car has become a luxury	81%	76%	87%	91%	85%	85%	82%	70%	84%	73%	88%	78%
Without a car, you wouldn't be able to get around as you'd like	80%	78%	82%	81%	84%	83%	78%	75%	80%	79%	82%	79%
Your car is the biggest expense in your budget	49%	42%	57%	73%	59%	55%	46%	31%	53%	38%	57%	45%

“Perceptions regarding the cost of travel



Spain
1000
motorists

Q. Do you agree or disagree with each of the following statements?

New question

	% Agree	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
Agree with all statements	37%	48%	38%	31%	34%	35%	41%	36%	45%	43%	34%	42%	27%
Getting around is becoming increasingly expensive	96%	96%	93%	98%	95%	97%	95%	96%	93%	95%	97%	96%	94%
International tensions will have have a lasting impact on fuel prices	96%	97%	96%	97%	96%	96%	95%	91%	96%	95%	95%	96%	95%
Owning a private car has become a luxury	81%	82%	80%	81%	74%	82%	84%	76%	81%	83%	81%	81%	81%
Without a car, you wouldn't be able to get around as you'd like	80%	85%	79%	72%	84%	79%	80%	88%	91%	87%	76%	85%	69%
Your car is the biggest expense in your budget	49%	63%	50%	48%	46%	50%	47%	44%	56%	49%	48%	54%	39%



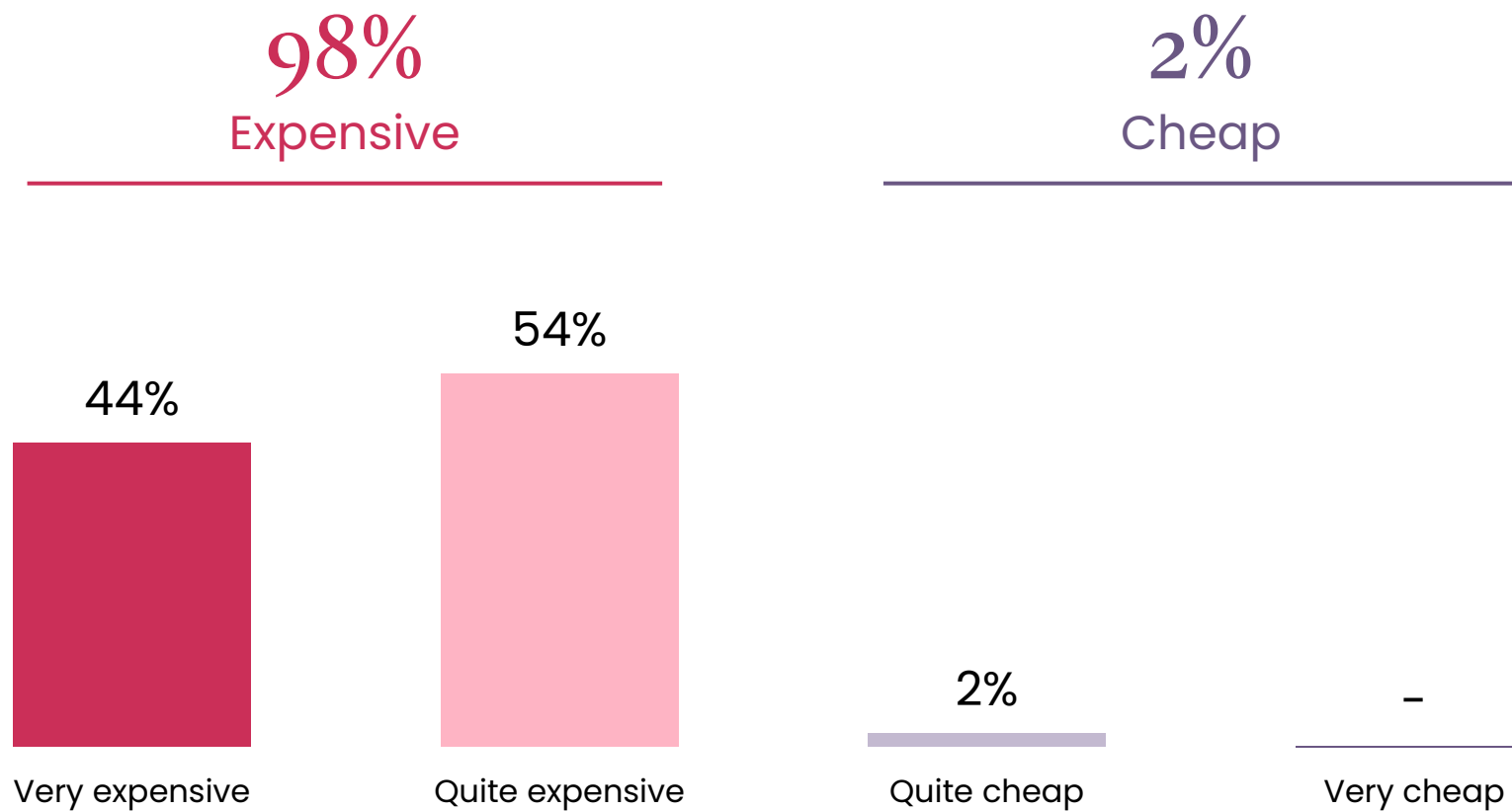
The cost of travelling by private car



France
1000
motorists

Q. Would you say that travelling by private car today is...?

New question





The cost of travelling by private car



France
1000
motorists

Q. Would you say that travelling by private car today is...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Expensive	98%	97%	98%	97%	93%	98%	100%	96%	98%	97%	97%	97%
...Very expensive	44%	41%	46%	43%	46%	50%	50%	29%	49%	35%	47%	41%
...Quite expensive	54%	56%	52%	54%	47%	48%	50%	67%	49%	62%	50%	56%
Subtotal Cheap	2%	3%	2%	3%	7%	2%	–	3%	2%	3%	3%	3%
...Quite cheap	2%	3%	2%	3%	6%	2%	–	3%	2%	3%	3%	3%
...Very cheap	–	–	–	–	1%	–	–	–	–	–	–	–



The cost of travelling by private car



France
1000
motorists

Q. Would you say that travelling by private car today is...?

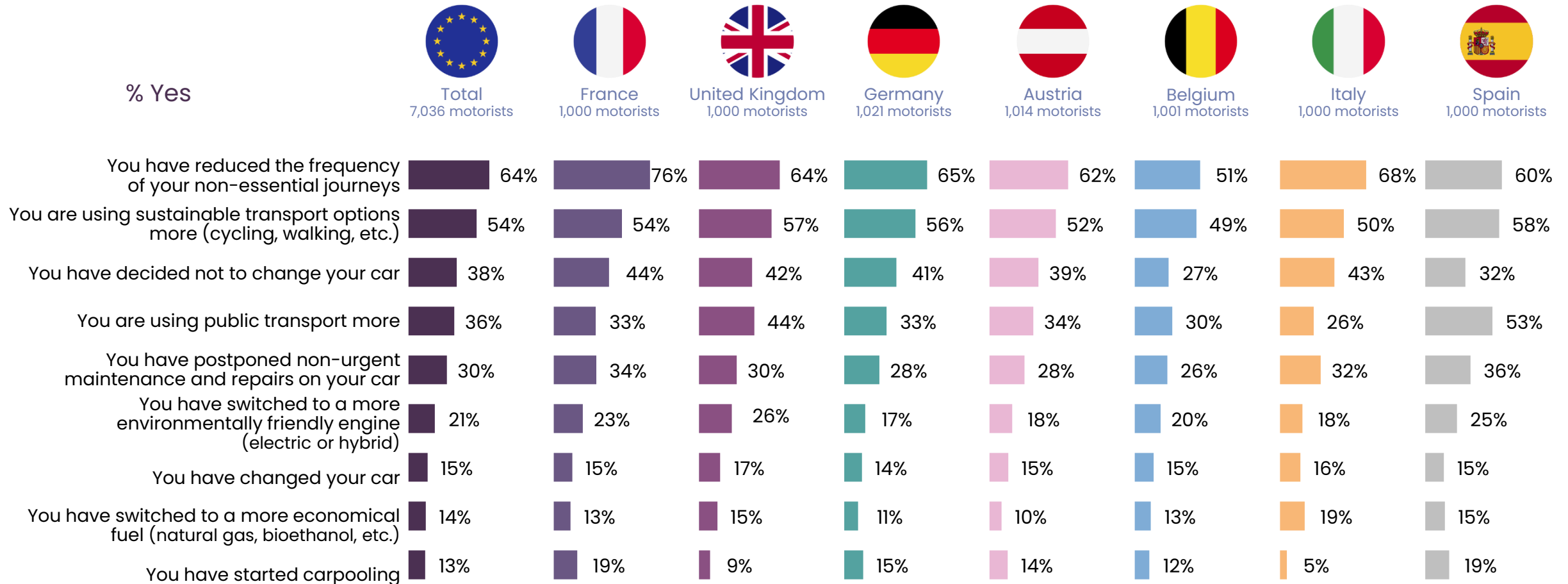
New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Expensive	98%	98%	99%	97%	94%	97%	98%	98%	97%	98%	96%
...Very expensive	44%	44%	45%	50%	35%	40%	50%	43%	41%	46%	38%
...Quite expensive	54%	54%	54%	47%	59%	57%	48%	55%	56%	52%	58%
Subtotal Cheap	2%	2%	1%	3%	5%	3%	1%	2%	3%	2%	3%
...Quite cheap	2%	2%	1%	3%	5%	3%	1%	2%	3%	2%	3%
...Very cheap	-	-	-	-	-	-	-	-	-	-	-

“Practices recently adopted due to financial constraints⁴

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question





Practices recently adopted due to financial constraints



France
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18-24 years	25-34 years	35-49 years	50-64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	76%	74%	78%	75%	72%	75%	80%	75%	75%	76%	80%	74%
You are using sustainable transport options more (cycling, walking, etc.)	54%	55%	52%	75%	57%	51%	50%	51%	54%	53%	59%	52%
You have decided not to change your car	44%	45%	42%	52%	48%	40%	43%	43%	44%	44%	50%	40%
You have postponed non-urgent maintenance and repairs on your car	34%	33%	34%	48%	49%	37%	27%	23%	38%	26%	41%	30%
You are using public transport more	33%	37%	30%	64%	42%	30%	29%	26%	37%	28%	39%	31%
You have switched to a more environmentally friendly engine (electric or hybrid)	23%	28%	18%	27%	28%	19%	24%	20%	24%	20%	17%	26%
You have started carpooling	19%	21%	17%	40%	32%	18%	14%	10%	23%	12%	25%	16%
You have changed your car	15%	17%	13%	10%	25%	14%	14%	12%	17%	11%	13%	15%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	13%	17%	10%	19%	16%	14%	12%	10%	15%	11%	13%	13%



Practices recently adopted due to financial constraints



France
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	76%	74%	73%	79%	78%	75%	72%	80%	74%	75%	77%
You are using sustainable transport options more (cycling, walking, etc.)	54%	64%	56%	54%	51%	46%	34%	56%	63%	50%	62%
You have decided not to change your car	44%	40%	45%	44%	41%	46%	45%	45%	42%	44%	43%
You have postponed non-urgent maintenance and repairs on your car	34%	41%	31%	33%	32%	33%	33%	32%	35%	34%	32%
You are using public transport more	33%	63%	25%	28%	26%	32%	12%	23%	53%	31%	38%
You've switched to a more environmentally friendly engine (electric or hybrid)	23%	38%	21%	21%	17%	21%	22%	16%	29%	26%	17%
You have started carpooling	19%	24%	18%	20%	14%	17%	15%	17%	21%	21%	14%
You have changed your car	15%	19%	16%	13%	13%	14%	16%	12%	16%	16%	13%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	13%	22%	8%	13%	12%	13%	10%	11%	16%	13%	13%



Practices recently adopted due to financial constraints



United Kingdom
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	64%	61%	66%	74%	65%	64%	62%	58%	64%	63%	70%	62%
You are using sustainable transport options more (cycling, walking, etc.)	57%	57%	57%	74%	68%	56%	48%	49%	60%	52%	61%	56%
You are using public transport more	44%	44%	43%	66%	51%	38%	32%	46%	43%	45%	44%	44%
You have decided not to change your car	42%	39%	44%	39%	34%	42%	44%	47%	40%	45%	54%	38%
You have postponed non-urgent maintenance and repairs on your car	30%	28%	31%	43%	42%	40%	21%	9%	36%	18%	29%	31%
You have switched to a more environmentally friendly engine (electric or hybrid)	26%	27%	24%	41%	44%	29%	17%	8%	32%	15%	18%	28%
You have changed your car	17%	19%	15%	21%	28%	21%	11%	6%	22%	8%	12%	18%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	15%	16%	13%	37%	27%	14%	7%	1%	20%	4%	12%	15%
You have started carpooling	9%	9%	8%	16%	18%	12%	2%	–	12%	2%	9%	9%



Practices recently adopted due to financial constraints



United Kingdom
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	64%	60%	68%	68%	60%	71%	64%	56%	62%	62%	65%	62%	68%
You make more use of sustainable transport (cycling, walking, etc.)	57%	52%	64%	63%	52%	68%	59%	54%	42%	54%	62%	55%	63%
You are using public transport more	44%	34%	43%	63%	46%	52%	40%	43%	26%	38%	50%	37%	60%
You have decided not to change your car	42%	47%	41%	39%	40%	40%	28%	45%	42%	41%	43%	41%	44%
You have postponed non-urgent maintenance and repairs on your car	30%	20%	31%	49%	20%	41%	25%	28%	17%	21%	37%	29%	31%
You have switched to a more environmentally friendly engine (electric or hybrid)	26%	19%	29%	48%	23%	30%	20%	14%	14%	19%	32%	30%	16%
You have changed your car	17%	15%	20%	22%	13%	23%	10%	13%	9%	12%	21%	20%	8%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	15%	12%	14%	26%	9%	23%	13%	7%	4%	6%	21%	17%	9%
You have started carpooling	9%	8%	9%	11%	8%	17%	5%	5%	3%	4%	12%	9%	7%



Practices recently adopted due to financial constraints



Germany
1021
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	65%	60%	71%	74%	62%	67%	60%	68%	64%	70%	73%	63%
You are using sustainable transport options more (cycling, walking, etc.)	56%	52%	61%	61%	65%	61%	51%	49%	58%	50%	60%	56%
You have decided not to change your car	41%	37%	45%	50%	43%	42%	39%	37%	41%	41%	46%	39%
You are using public transport more	33%	32%	35%	54%	52%	34%	25%	20%	37%	22%	37%	32%
You have postponed non-urgent maintenance and repairs on your car	28%	22%	34%	46%	41%	29%	22%	16%	30%	20%	32%	26%
Have you switched to a more environmentally friendly engine (electric or hybrid)	17%	15%	19%	28%	29%	18%	11%	8%	19%	10%	15%	18%
You have started carpooling	15%	12%	18%	51%	22%	16%	7%	3%	17%	9%	20%	13%
You have changed your car	14%	13%	15%	33%	23%	15%	7%	5%	16%	7%	17%	13%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	11%	10%	12%	27%	18%	13%	6%	2%	14%	3%	13%	10%



Practices recently adopted due to financial constraints



Germany
1021
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	REGION						TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	65%	65%	64%	66%	64%	61%	70%	65%	64%	67%	65%	67%
You are using sustainable transport options more (cycling, walking, etc.)	56%	61%	61%	54%	58%	47%	55%	50%	55%	63%	54%	60%
You have decided not to change your car	41%	47%	35%	40%	43%	36%	46%	38%	41%	44%	42%	40%
You are using public transport more	33%	36%	33%	34%	40%	28%	31%	19%	29%	50%	31%	39%
You have postponed non-urgent maintenance and repairs on your car	28%	36%	23%	27%	32%	24%	27%	21%	28%	34%	30%	23%
You have switched to a more environmentally friendly engine (electric or hybrid)	17%	16%	14%	18%	23%	18%	14%	11%	19%	20%	18%	12%
You have started carpooling	15%	21%	15%	16%	19%	11%	11%	14%	14%	17%	17%	11%
You have changed your car	14%	14%	14%	17%	17%	11%	11%	9%	19%	15%	15%	11%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	11%	8%	11%	11%	18%	9%	10%	7%	12%	14%	12%	8%



Practices recently adopted due to financial constraints



Austria
1014
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	62%	60%	64%	62%	64%	61%	64%	57%	62%	63%	66%	63%
You make more use of sustainable transport (cycling, walking, etc.)	52%	51%	53%	66%	56%	56%	47%	37%	54%	45%	60%	52%
You have decided not to change your car	39%	38%	39%	46%	37%	39%	36%	41%	38%	39%	49%	37%
You are using public transport more	34%	36%	33%	62%	40%	32%	29%	22%	37%	27%	44%	33%
You have postponed non-urgent maintenance and repairs on your car	28%	28%	28%	38%	40%	29%	22%	10%	29%	20%	38%	25%
You have switched to a more environmentally friendly engine (electric or hybrid)	18%	22%	14%	32%	27%	14%	14%	13%	19%	13%	17%	19%
You have changed your car	15%	16%	14%	30%	27%	12%	9%	7%	17%	8%	14%	16%
You have started carpooling	14%	12%	16%	46%	22%	14%	4%	2%	17%	6%	21%	12%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	10%	11%	8%	24%	21%	8%	2%	4%	11%	4%	14%	9%



Practices recently adopted due to financial constraints



Austria
1014
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

New question	% Yes	REGION										TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder-österreich	Ober-österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week	
You have reduced the frequency of your non-essential journeys	62%	66%	66%	58%	64%	83%	63%	65%	55%	54%	64%	58%	62%	59%	67%	
You make more use of sustainable transport (cycling, walking, etc.)	52%	43%	55%	47%	51%	68%	52%	60%	47%	54%	43%	53%	64%	48%	61%	
You have decided not to change your car	39%	34%	35%	38%	42%	45%	36%	30%	50%	41%	37%	39%	41%	38%	39%	
You are using public transport more	34%	20%	30%	29%	26%	50%	33%	39%	31%	50%	23%	34%	50%	28%	50%	
You have postponed non-urgent maintenance and repairs on your car	28%	19%	29%	31%	29%	31%	28%	30%	12%	25%	27%	25%	30%	30%	22%	
You have switched to a more environmentally friendly engine (electric or hybrid)	18%	11%	14%	16%	14%	20%	18%	29%	15%	22%	15%	15%	23%	19%	14%	
You have changed your car	15%	14%	19%	13%	13%	18%	14%	21%	10%	15%	12%	15%	19%	16%	12%	
You have started carpooling	14%	17%	18%	12%	17%	16%	13%	16%	15%	13%	11%	16%	17%	16%	11%	
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	10%	6%	11%	6%	9%	11%	7%	15%	8%	14%	4%	13%	15%	10%	9%	



Practices recently adopted due to financial constraints



Belgium
1001
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	51%	50%	54%	51%	53%	54%	51%	48%	51%	53%	55%	51%
You are using sustainable transport options more (cycling, walking, etc.)	49%	47%	51%	44%	59%	53%	49%	38%	51%	46%	53%	48%
You are using public transport more	30%	33%	26%	58%	42%	28%	24%	17%	33%	26%	37%	29%
You have decided not to change your car	27%	26%	27%	33%	37%	23%	28%	20%	27%	27%	41%	21%
You have postponed non-urgent maintenance and repairs on your car	26%	24%	28%	30%	44%	29%	21%	14%	29%	22%	39%	22%
You have switched to a more environmentally friendly engine (electric or hybrid)	20%	23%	17%	46%	29%	15%	16%	14%	25%	14%	16%	23%
You have changed your car	15%	14%	16%	23%	25%	16%	12%	7%	19%	9%	20%	15%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	13%	13%	13%	30%	27%	12%	8%	2%	17%	7%	22%	11%
You have started carpooling	12%	9%	15%	34%	22%	10%	7%	1%	15%	7%	20%	10%



Practices recently adopted due to financial constraints



Belgium
1001
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	51%	39%	72%	70%	53%	48%	64%	50%	53%
You are using sustainable transport options more (cycling, walking, etc.)	49%	49%	63%	43%	40%	52%	58%	44%	57%
You are using public transport more	30%	27%	68%	24%	17%	32%	54%	28%	33%
You have decided not to change your car	27%	21%	42%	34%	23%	28%	34%	27%	26%
You have postponed non-urgent maintenance and repairs on your car	26%	23%	47%	24%	20%	27%	35%	27%	22%
You have switched to a more environmentally friendly engine (electric or hybrid)	20%	19%	33%	19%	17%	21%	31%	22%	17%
You have changed your car	15%	12%	26%	18%	13%	15%	23%	19%	8%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	13%	10%	27%	14%	8%	14%	18%	14%	11%
You have started carpooling	12%	9%	25%	12%	10%	12%	17%	13%	10%



Practices recently adopted due to financial constraints



Italy
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	68%	67%	69%	77%	67%	64%	71%	66%	65%	71%	73%	63%
You are using sustainable transport options more (cycling, walking, etc.)	50%	52%	49%	55%	42%	48%	52%	54%	48%	52%	52%	50%
You have decided not to change your car	43%	44%	42%	47%	39%	42%	45%	42%	41%	45%	50%	33%
You have postponed non-urgent maintenance and repairs on your car	32%	30%	34%	45%	33%	34%	34%	23%	33%	31%	40%	25%
You are using public transport more	26%	28%	25%	52%	32%	23%	23%	24%	26%	26%	29%	26%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	19%	22%	17%	36%	17%	21%	17%	16%	22%	17%	21%	19%
You've switched to a more environmentally friendly engine (electric or hybrid)	18%	18%	17%	40%	12%	19%	17%	14%	19%	16%	14%	24%
You have changed your car	16%	16%	16%	28%	13%	16%	19%	11%	18%	14%	14%	20%
You have started carpooling	5%	5%	6%	18%	3%	8%	3%	2%	7%	4%	6%	6%



Practices recently adopted due to financial constraints



Italy
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	68%	68%	62%	69%	72%	64%	66%	73%	61%	66%	73%
You are using sustainable transport options more (cycling, walking, etc.)	50%	52%	49%	53%	49%	46%	48%	51%	52%	47%	61%
You have decided not to change your car	43%	39%	43%	47%	41%	51%	42%	47%	37%	43%	43%
You have postponed non-urgent maintenance and repairs on your car	32%	23%	31%	35%	38%	38%	29%	36%	30%	32%	31%
You are using public transport more	26%	25%	20%	24%	33%	31%	16%	27%	40%	24%	36%
Have you switched to a more economical fuel (natural gas, bioethanol, etc.)	19%	13%	23%	23%	23%	14%	14%	23%	21%	21%	13%
You have switched to a more environmentally friendly engine (electric or hybrid)	18%	23%	18%	16%	15%	14%	14%	16%	25%	20%	12%
You have changed your car	16%	16%	20%	17%	15%	9%	13%	19%	16%	18%	8%
You have started carpooling	5%	5%	5%	5%	5%	11%	3%	6%	8%	6%	3%



Practices recently adopted due to financial constraints



Spain
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
You have reduced the frequency of your non-essential journeys	60%	59%	62%	74%	61%	62%	55%	58%	60%	61%	70%	55%
You are using sustainable transport options more (cycling, walking, etc.)	58%	60%	57%	72%	61%	62%	55%	52%	60%	54%	62%	56%
You are using public transport more	53%	53%	53%	62%	56%	48%	52%	55%	53%	51%	55%	52%
You have postponed non-urgent maintenance and repairs on your car?	36%	34%	37%	56%	50%	39%	31%	21%	39%	27%	50%	28%
You have decided not to change your car	32%	33%	31%	41%	28%	31%	30%	34%	29%	37%	45%	25%
You have switched to a more environmentally friendly engine (electric or hybrid)	25%	26%	24%	28%	37%	27%	23%	16%	28%	17%	24%	26%
You have started carpooling	19%	16%	22%	42%	39%	19%	12%	5%	22%	10%	25%	16%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	15%	14%	18%	30%	28%	15%	11%	7%	18%	9%	18%	14%
You have changed your car	15%	13%	17%	19%	29%	16%	10%	7%	18%	7%	18%	13%



Practices recently adopted due to financial constraints



Spain
1000
motorists

Q. Have you personally recently adopted each of the following practices recently due to financial constraints?

New question

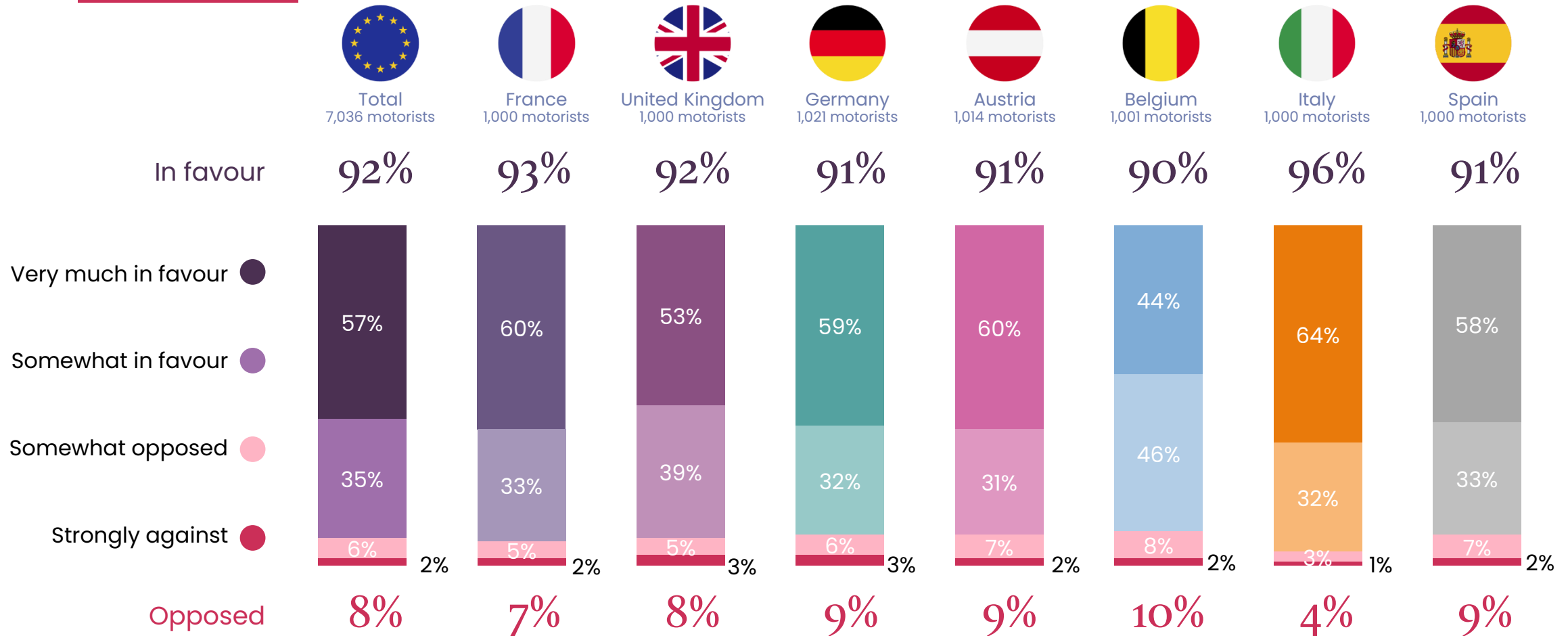
	% Yes	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
You have reduced the frequency of your non-essential journeys	60%	66%	57%	54%	59%	60%	65%	61%	69%	55%	60%	60%	61%
You are using sustainable transport options more (cycling, walking, etc.)	58%	52%	52%	54%	59%	60%	65%	49%	53%	56%	60%	55%	64%
You are using public transport more	53%	53%	55%	55%	47%	57%	49%	56%	30%	47%	58%	49%	60%
You have postponed non-urgent maintenance and repairs on your car	36%	37%	34%	33%	30%	33%	45%	34%	36%	39%	35%	38%	30%
You have decided not to change your car	32%	32%	30%	27%	27%	28%	39%	46%	36%	34%	31%	32%	31%
You have switched to a more environmentally friendly engine (electric or hybrid)	25%	14%	27%	34%	19%	28%	24%	17%	19%	24%	26%	30%	16%
You have started carpooling	19%	17%	17%	13%	23%	15%	25%	18%	23%	22%	18%	21%	15%
You have switched to a more economical fuel (natural gas, bioethanol, etc.)	15%	17%	18%	17%	16%	13%	19%	4%	14%	10%	17%	16%	14%
You have changed your car	15%	12%	17%	15%	10%	16%	16%	13%	13%	10%	16%	18%	8%



Support for the *introduction of a price cap* in one's country

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question



” Support for the *introduction of a price cap* in one’s country



France
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	93%	90%	95%	94%	95%	93%	93%	90%	94%	91%	95%	92%
...Very much in favour	60%	59%	62%	58%	59%	64%	60%	58%	62%	58%	60%	60%
...Somewhat in favour	33%	31%	33%	36%	36%	29%	33%	32%	32%	33%	35%	32%
Subtotal Opposed	7%	10%	5%	4%	4%	7%	7%	10%	6%	8%	4%	8%
...Somewhat opposed	5%	7%	4%	4%	3%	6%	4%	7%	5%	6%	3%	6%
...Strongly against	2%	3%	1%	–	1%	1%	3%	3%	1%	2%	1%	2%



Support for the *introduction of a price cap* in one's country



France
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	93%	93%	91%	94%	92%	94%	93%	95%	91%	94%	91%
...Very much in favour	60%	58%	60%	63%	59%	60%	67%	63%	54%	64%	53%
...Somewhat in favour	33%	35%	31%	31%	33%	34%	26%	32%	37%	30%	38%
Subtotal Opposed	7%	6%	9%	6%	7%	6%	7%	5%	8%	6%	9%
...Somewhat opposed	5%	5%	6%	4%	5%	5%	5%	3%	7%	4%	8%
...Strongly against	2%	1%	3%	2%	2%	1%	2%	2%	1%	2%	1%



Support for the *introduction of a price cap* in one's country



United Kingdom
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	92%	92%	92%	87%	91%	92%	95%	90%	94%	88%	92%	91%
...Very much in favour	53%	51%	54%	33%	49%	55%	58%	55%	52%	53%	57%	51%
...Somewhat in favour	39%	41%	38%	54%	42%	37%	37%	35%	42%	35%	35%	40%
Subtotal Opposed	8%	8%	8%	13%	9%	8%	5%	10%	6%	12%	8%	9%
...Somewhat opposed	5%	5%	5%	13%	7%	4%	1%	6%	4%	7%	5%	6%
...Strongly against	3%	3%	3%	–	2%	4%	4%	4%	2%	5%	3%	3%



Support for the *introduction of a price cap* in one's country



United Kingdom
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	92%	94%	89%	88%	88%	97%	92%	93%	94%	95%	90%	94%	87%
...Very much in favour	53%	55%	50%	48%	56%	57%	47%	50%	55%	57%	50%	56%	45%
...Somewhat in favour	39%	39%	39%	40%	32%	40%	45%	43%	39%	38%	40%	38%	42%
Subtotal Opposed	8%	6%	11%	12%	12%	3%	8%	7%	6%	5%	10%	6%	13%
...Somewhat opposed	5%	3%	7%	9%	8%	3%	4%	5%	4%	4%	6%	5%	7%
...Strongly against	3%	3%	4%	3%	4%	-	4%	2%	2%	1%	4%	1%	6%



Support for the *introduction of a price cap* in one's country



Germany
1021
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	91%	89%	93%	95%	92%	93%	89%	88%	91%	89%	93%	91%
...Very much in favour	59%	56%	63%	51%	54%	60%	62%	62%	59%	60%	56%	61%
...Somewhat in favour	32%	33%	30%	44%	38%	33%	27%	26%	32%	29%	37%	30%
Subtotal Opposed	9%	11%	7%	5%	8%	7%	11%	12%	9%	11%	7%	9%
...Somewhat opposed	6%	8%	4%	5%	6%	4%	6%	9%	5%	9%	5%	6%
...Strongly against	3%	3%	3%	–	2%	3%	5%	3%	4%	2%	2%	3%



Support for the *introduction of a price cap* in one's country



Germany
1021
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION						TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Almost every day	At least once a week
Subtotal In favour	91%	89%	91%	89%	94%	89%	93%	92%	91%	89%	92%	88%
...Very much in favour	59%	51%	57%	63%	59%	61%	65%	64%	59%	54%	62%	54%
...Somewhat in favour	32%	38%	34%	26%	35%	28%	28%	28%	32%	35%	30%	34%
Subtotal Opposed	9%	11%	9%	11%	6%	10%	7%	8%	9%	11%	8%	12%
...Somewhat opposed	6%	6%	6%	9%	4%	6%	4%	5%	6%	8%	5%	8%
...Strongly against	3%	5%	3%	2%	2%	4%	3%	3%	3%	3%	3%	4%



Support for the *introduction of a price cap* in one's country



Austria
1014
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	91%	87%	94%	98%	93%	91%	88%	83%	91%	89%	93%	89%
...Very much in favour	60%	57%	63%	64%	61%	52%	65%	54%	59%	64%	60%	59%
...Somewhat in favour	31%	30%	31%	34%	32%	39%	23%	29%	32%	25%	33%	30%
Subtotal Opposed	9%	13%	6%	2%	7%	9%	12%	16%	9%	11%	7%	11%
...Somewhat opposed	7%	10%	5%	1%	6%	6%	9%	14%	7%	9%	5%	8%
...Strongly against	2%	3%	1%	1%	1%	3%	3%	2%	2%	2%	2%	3%



Support for the *introduction of a price cap* in one's country



Austria
1014
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION									TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder- österreich	Ober- österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	91%	84%	91%	87%	91%	94%	92%	95%	95%	86%	92%	88%	90%	93%	84%
...Very much in favour	60%	60%	67%	52%	59%	74%	60%	72%	52%	56%	64%	52%	58%	63%	51%
...Somewhat in favour	31%	24%	24%	35%	32%	20%	32%	23%	43%	30%	28%	36%	32%	30%	33%
Subtotal Opposed	9%	16%	9%	13%	9%	6%	7%	5%	5%	13%	8%	12%	10%	7%	15%
...Somewhat opposed	7%	13%	5%	10%	6%	6%	6%	5%	5%	10%	6%	8%	8%	5%	13%
...Strongly against	2%	3%	4%	3%	3%	-	1%	-	-	3%	2%	4%	2%	2%	2%



Support for the *introduction of a price cap* in one's country



Belgium
1001
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	90%	88%	92%	95%	86%	89%	91%	91%	89%	92%	91%	90%
...Very much in favour	44%	41%	47%	31%	45%	41%	57%	39%	44%	45%	49%	44%
...Somewhat in favour	46%	47%	45%	64%	41%	48%	34%	52%	45%	47%	42%	46%
Subtotal Opposed	10%	12%	8%	5%	14%	11%	9%	9%	11%	8%	9%	10%
...Somewhat opposed	8%	9%	7%	5%	9%	8%	8%	7%	8%	7%	8%	7%
...Strongly against	2%	3%	1%	–	5%	3%	1%	2%	3%	1%	1%	3%



Support for the *introduction of a price cap* in one's country

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?



Belgium
1001
motorists

New question

	% Total	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	90%	89%	90%	93%	90%	90%	92%	92%	87%
...Very much in favour	44%	37%	39%	59%	48%	41%	47%	48%	38%
...Somewhat in favour	46%	52%	51%	34%	42%	49%	45%	44%	49%
Subtotal Opposed	10%	11%	10%	7%	10%	10%	7%	8%	13%
...Somewhat opposed	8%	9%	6%	5%	8%	7%	6%	6%	10%
...Strongly against	2%	2%	4%	2%	2%	3%	1%	2%	3%



Support for the *introduction of a price cap* in one's country



Italy
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	96%	96%	96%	95%	94%	95%	97%	96%	95%	96%	96%	95%
...Very much in favour	64%	64%	64%	53%	57%	64%	70%	65%	67%	61%	64%	65%
...Somewhat in favour	32%	32%	32%	42%	37%	31%	27%	31%	28%	35%	32%	30%
Subtotal Opposed	4%	4%	4%	5%	5%	5%	3%	4%	5%	4%	4%	5%
...Somewhat opposed	3%	4%	2%	4%	4%	3%	3%	3%	4%	3%	3%	4%
...Strongly against	1%	–	2%	1%	1%	2%	–	1%	1%	1%	1%	1%



Support for the *introduction of a price cap* in one's country



Italy
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	96%	95%	93%	97%	96%	99%	95%	96%	96%	96%	97%
...Very much in favour	64%	61%	59%	68%	68%	65%	67%	62%	63%	66%	59%
...Somewhat in favour	32%	34%	34%	29%	28%	34%	28%	34%	33%	30%	38%
Subtotal Opposed	4%	5%	7%	3%	4%	1%	4%	4%	4%	4%	3%
...Somewhat opposed	3%	4%	7%	3%	2%	1%	4%	3%	3%	3%	3%
...Strongly against	1%	1%	–	–	2%	–	–	1%	1%	1%	–

” Support for the *introduction of a price cap* in one’s country



Spain
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	91%	92%	91%	87%	92%	93%	92%	90%	91%	93%	90%	92%
...Very much in favour	58%	60%	57%	51%	49%	61%	62%	60%	58%	59%	57%	59%
...Somewhat in favour	33%	32%	34%	36%	43%	32%	30%	30%	33%	34%	33%	33%
Subtotal Opposed	9%	8%	9%	13%	8%	7%	8%	10%	9%	7%	10%	8%
...Somewhat opposed	7%	6%	7%	10%	7%	5%	5%	8%	7%	5%	6%	7%
...Strongly against	2%	2%	2%	3%	1%	2%	3%	2%	2%	2%	4%	1%

” Support for the *introduction of a price cap* in one’s country



Spain
1000
motorists

Q. Are you in favour of or opposed to the introduction of a price cap in your country to limit the rise in fuel prices?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	91%	91%	92%	93%	89%	92%	90%	94%	91%	93%	91%	91%	91%
...Very much in favour	58%	58%	55%	60%	62%	57%	56%	66%	66%	62%	56%	59%	57%
...Somewhat in favour	33%	33%	37%	33%	27%	35%	34%	28%	25%	31%	35%	32%	34%
Subtotal Opposed	9%	9%	8%	7%	11%	8%	10%	6%	9%	7%	9%	9%	9%
...Somewhat opposed	7%	7%	6%	6%	8%	6%	7%	2%	7%	5%	7%	6%	7%
...Strongly against	2%	2%	2%	1%	3%	2%	3%	4%	2%	2%	2%	3%	2%

2



Buying a *new car*



Criteria for choosing a new car

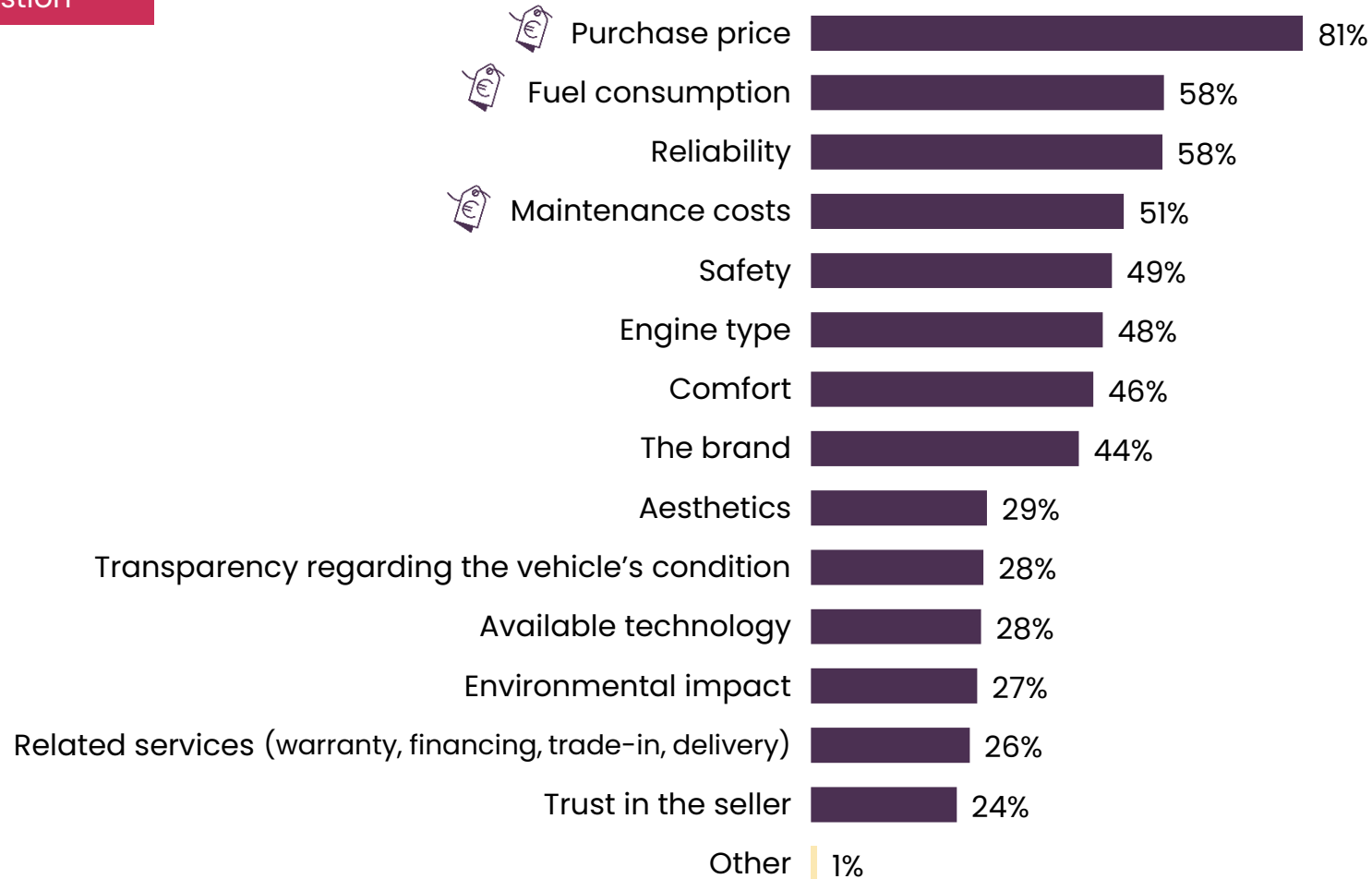


France
1000
motorists

Q. When choosing a new car, what are the most important criteria for you?

Multiple answers possible – Total may exceed 100%

New question



Financial aspects





Criteria for choosing a new car

Q. When choosing a new car, what are the most important criteria for you?

Multiple answers possible – Total exceeds 100%

New question



France
1000
motorists

1/2	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Woman	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Financial aspects	91%	89%	93%	86%	84%	89%	95%	95%	90%	93%	88%	92%
...Purchase price	81%	79%	83%	71%	69%	78%	88%	86%	79%	83%	76%	83%
...Fuel consumption	58%	57%	59%	50%	41%	52%	64%	70%	53%	67%	53%	60%
...Maintenance costs	51%	51%	52%	53%	38%	52%	51%	59%	50%	54%	47%	53%
Reliability	58%	61%	55%	61%	50%	55%	60%	61%	58%	57%	49%	61%
Safety	49%	49%	50%	51%	38%	41%	51%	63%	44%	59%	48%	50%
Engine type	48%	54%	42%	31%	34%	44%	53%	60%	45%	53%	40%	52%
Comfort	46%	49%	44%	53%	38%	42%	47%	52%	44%	50%	46%	47%



Criteria for choosing a new car



France
1000
motorists

Q. When choosing a new car, what are the most important criteria for you?

Multiple answers possible – Total exceeds 100%

New question

2/2

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
The brand	44%	48%	41%	41%	36%	36%	45%	56%	40%	50%	40%	46%
Aesthetics	29%	31%	27%	36%	21%	28%	26%	35%	27%	32%	24%	31%
Transparency regarding the vehicle's condition	28%	31%	26%	30%	17%	24%	27%	40%	24%	35%	26%	29%
Available technology	28%	32%	24%	29%	19%	23%	29%	37%	25%	33%	21%	31%
Environmental impact	27%	27%	27%	30%	17%	27%	26%	35%	24%	32%	24%	29%
Related services (warranty, financing, trade-in, delivery)	26%	28%	24%	27%	17%	21%	25%	37%	22%	32%	21%	28%
Trust in the seller	24%	24%	24%	25%	16%	17%	24%	35%	20%	31%	22%	24%
Other	1%	1%	1%	–	–	2%	2%	1%	1%	1%	1%	1%



Criteria for choosing a new car

Q. When choosing a new car, what are the most important criteria for you?

Multiple answers possible – Total exceeds 100%

New question



France
1000
motorists

1/2	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Financial aspects	91%	84%	92%	91%	95%	92%	92%	93%	89%	91%	90%
...Purchase price	81%	74%	83%	82%	80%	80%	79%	84%	79%	80%	82%
...Fuel consumption	58%	56%	58%	59%	59%	56%	63%	62%	52%	58%	58%
...Maintenance costs	51%	47%	54%	54%	43%	53%	50%	54%	50%	50%	53%
Reliability	58%	54%	60%	56%	56%	60%	56%	58%	59%	58%	56%
Safety	49%	51%	52%	49%	43%	50%	47%	51%	49%	48%	53%
Engine type	48%	48%	53%	47%	47%	44%	50%	51%	44%	48%	48%
Comfort	46%	51%	48%	47%	37%	46%	48%	45%	46%	47%	44%



Criteria for choosing a new car



France
1000
motorists

Q. When choosing a new car, what are the most important criteria for you?

Multiple answers possible – Total exceeds 100%

New question

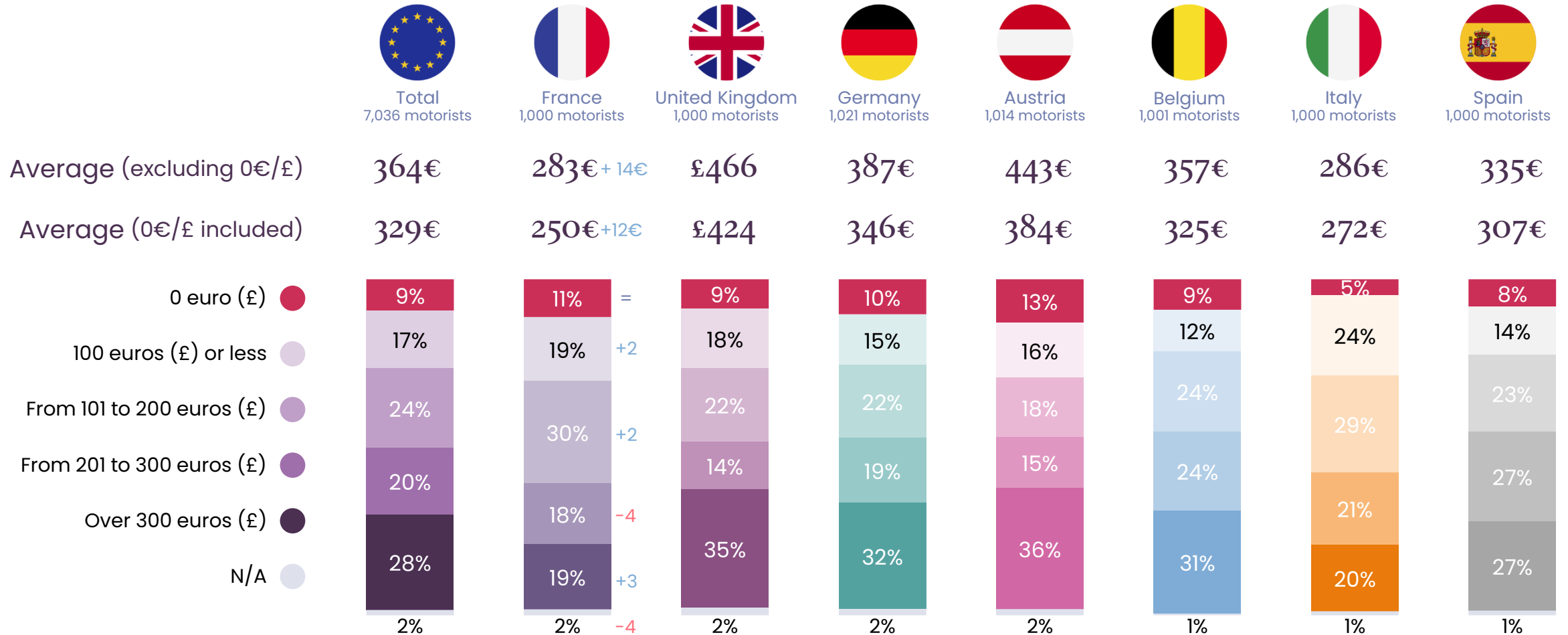
2/2	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
The brand	44%	46%	43%	45%	43%	44%	43%	45%	43%	44%	44%
Aesthetics	29%	31%	27%	29%	27%	30%	27%	29%	30%	29%	28%
Transparency regarding the vehicle's condition	28%	26%	32%	26%	28%	28%	28%	30%	27%	27%	32%
Available technology	28%	28%	28%	26%	26%	30%	30%	26%	29%	29%	24%
Environmental impact	27%	33%	26%	29%	24%	26%	26%	28%	28%	27%	28%
Related services (warranty, financing, trade-in, delivery)	26%	28%	27%	24%	26%	26%	28%	25%	25%	26%	25%
Trust in the seller	24%	19%	27%	24%	24%	25%	25%	24%	23%	23%	26%
Other	1%	1%	1%	–	3%	1%	2%	1%	–	1%	2%



The monthly budget for financing a new car

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses





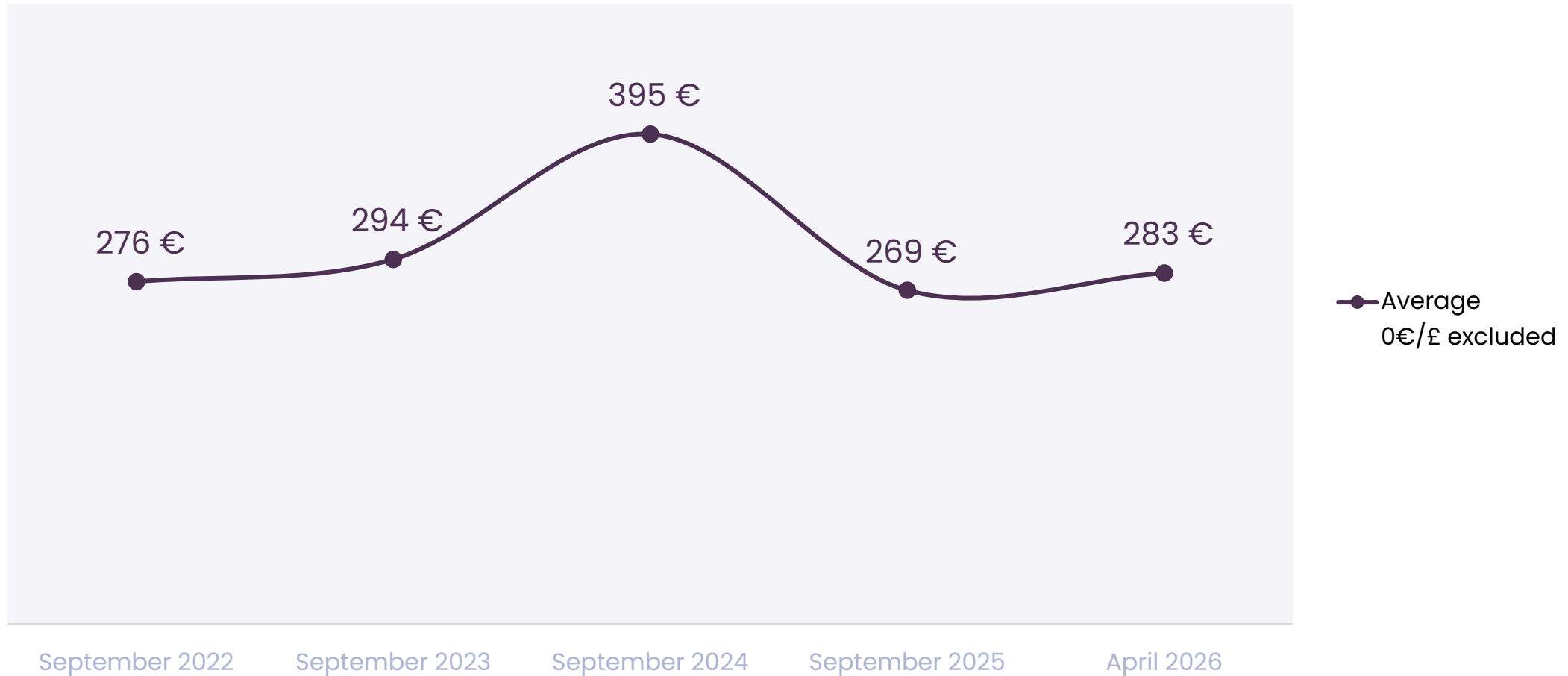
The monthly budget for financing a new car



France
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses





The monthly budget for financing a new car



France
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	11%	8%	14%	6%	8%	14%	10%	13%	10%	14%	15%	9%
100 euros or less	19%	13%	25%	26%	18%	21%	21%	15%	20%	18%	28%	15%
From 101 to 200 euros	30%	27%	33%	35%	33%	32%	33%	23%	32%	27%	31%	30%
From 201 to 300 euros	18%	22%	14%	12%	13%	16%	19%	24%	17%	20%	10%	22%
Over 300 euros	19%	27%	12%	18%	26%	17%	15%	23%	20%	19%	13%	23%
Average (excluding 0€)	€283	€345	€221	€348	€326	€258	€243	€301	€292	€266	€251	€301
Average (including 0€)	€250	€316	€190	€326	€299	€223	€217	€260	€263	€229	€212	€274



The monthly budget for financing a new car



France
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
0 euro	11%	5%	12%	10%	14%	14%	16%	14%	7%	10%	15%
100 euros or less	19%	17%	22%	20%	14%	19%	21%	19%	18%	18%	21%
From 101 to 200 euros	30%	24%	32%	28%	35%	33%	29%	31%	31%	31%	29%
From 201 to 300 euros	18%	18%	15%	20%	21%	17%	17%	19%	18%	19%	17%
Over 300 euros	19%	34%	18%	21%	16%	13%	16%	16%	24%	21%	16%
Average (excluding 0€)	€283	€378	€277	€276	€264	€244	€253	€267	€309	€287	€272
Average (including 0€)	€250	€360	€245	€247	€227	€209	€212	€230	€289	€259	€230



The monthly budget for financing a new car



United Kingdom
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
£0	9%	6%	12%	3%	2%	7%	17%	12%	7%	13%	13%	6%
£100 or less	18%	15%	21%	22%	15%	20%	15%	17%	15%	23%	30%	14%
From £101 to £200	22%	20%	24%	15%	11%	25%	26%	26%	21%	24%	28%	20%
From £201 to £300	14%	15%	13%	7%	10%	16%	18%	15%	14%	15%	11%	15%
Over £300	35%	41%	30%	44%	61%	31%	22%	27%	42%	23%	16%	42%
Average (excluding £0)	£466	£482	£450	£622	£789	£424	£293	£310	£541	£316	£258	£539
Average (including £0)	£424	£453	£396	£604	£773	£395	£243	£272	£504	£275	£223	£504



The monthly budget for financing a new car



United Kingdom
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
£0	9%	7%	12%	4%	9%	4%	11%	16%	12%	10%	7%	9%	9%
£100 or less	18%	21%	17%	13%	21%	9%	18%	20%	23%	16%	17%	15%	24%
From £101 to £200	22%	24%	22%	21%	25%	20%	21%	20%	25%	23%	21%	20%	26%
From £201 to £300	14%	14%	13%	12%	9%	22%	17%	14%	13%	20%	12%	15%	13%
Over £300	35%	31%	35%	47%	36%	44%	31%	27%	26%	29%	40%	39%	26%
Average (excluding £0)	£466	£347	£527	£560	£586	£507	£378	£373	£316	£355	£552	£510	£362
Average (including £0)	£424	£320	£463	£537	£534	£487	£335	£312	£278	£318	£510	£465	£329



The monthly budget for financing a new car



Germany
1021
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	10%	7%	14%	2%	6%	10%	12%	16%	8%	19%	17%	8%
100 euros or less	15%	11%	19%	21%	11%	18%	14%	14%	14%	19%	27%	9%
From 101 to 200 euros	22%	20%	24%	27%	19%	21%	24%	19%	22%	19%	27%	20%
From 201 to 300 euros	19%	22%	17%	8%	16%	21%	23%	21%	20%	19%	10%	24%
Over 300 euros	32%	38%	24%	37%	46%	29%	26%	28%	35%	22%	17%	38%
Average (excluding 0€)	€387	€423	€346	€431	€480	€335	€334	€419	€389	€380	€290	€429
Average (including 0€)	€346	€391	€297	€421	€450	€302	€294	€349	€359	€308	€240	€396



The monthly budget for financing a new car



Germany
1021
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION						TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Every day or almost	At least once a week
0 euro	10%	10%	8%	12%	8%	12%	13%	14%	9%	8%	9%	13%
100 euros or less	15%	21%	14%	14%	13%	13%	16%	17%	14%	14%	15%	16%
From 101 to 200 euros	22%	18%	21%	16%	23%	23%	27%	21%	26%	19%	21%	23%
From 201 to 300 euros	19%	19%	21%	19%	24%	18%	16%	19%	17%	22%	20%	19%
Over 300 euros	32%	29%	33%	38%	31%	34%	26%	27%	32%	35%	34%	27%
Average (excluding 0€)	€387	€355	€375	€490	€338	€416	€363	€353	€407	€404	€387	€387
Average (including 0€)	€346	€318	€346	€430	€312	€367	€314	€304	€368	€370	€350	€336



The monthly budget for financing a new car



Austria
1014
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	13%	9%	17%	5%	8%	14%	17%	16%	12%	18%	22%	9%
100 euros or less	16%	13%	20%	14%	18%	19%	16%	9%	17%	15%	23%	14%
From 101 to 200 euros	18%	14%	21%	16%	12%	18%	21%	15%	17%	19%	18%	18%
From 201 to 300 euros	15%	17%	13%	8%	18%	14%	15%	19%	15%	16%	9%	17%
Over 300 euros	36%	44%	28%	53%	43%	33%	29%	36%	38%	28%	25%	41%
Average (excluding 0€)	€443	€494	€386	€628	€448	€404	€395	€484	€443	€443	€393	€461
Average (including 0€)	€384	€449	€319	€593	€4,140	€347	€328	€404	€391	€359	€303	€420



The monthly budget for financing a new car



Austria
1014
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION										TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder-österreich	Ober-österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week	
0 euro	13%	18%	16%	15%	11%	7%	12%	9%	12%	15%	14%	12%	12%	12%	14%	
100 euros or less	16%	20%	7%	15%	19%	25%	17%	13%	23%	14%	16%	18%	16%	16%	18%	
From 101 to 200 euros	18%	27%	27%	16%	17%	13%	16%	23%	19%	14%	20%	17%	15%	18%	17%	
From 201 to 300 euros	15%	6%	11%	16%	16%	22%	21%	13%	16%	11%	15%	15%	16%	15%	15%	
Over 300 euros	36%	29%	38%	35%	36%	29%	33%	41%	30%	41%	33%	37%	39%	37%	33%	
Average (excluding 0€)	€443	€284	€608	€492	€464	€338	€355	€390	€338	€497	€425	€440	€466	€439	€450	
Average (including 0€)	€384	€233	€508	€415	€413	€312	€310	€354	€299	€420	€364	€385	€410	€384	€385	



The monthly budget for financing a new car



Belgium
1001
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	9%	7%	11%	2%	7%	8%	10%	13%	7%	12%	16%	7%
100 euros or less	12%	9%	16%	27%	20%	10%	11%	5%	14%	11%	18%	10%
From 101 to 200 euros	24%	22%	26%	12%	24%	31%	22%	23%	24%	24%	30%	23%
From 201 to 300 euros	24%	24%	23%	12%	17%	23%	28%	30%	23%	25%	13%	26%
Over 300 euros	31%	38%	23%	46%	32%	28%	27%	29%	33%	28%	23%	34%
Average (excluding 0€)	€357	€383	€328	€572	€381	€298	€302	€367	€358	€357	€431	€351
Average (including 0€)	€325	€357	€291	€559	€355	€274	€271	€317	€334	€313	€361	€328



The monthly budget for financing a new car

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses



Belgium
1001
motorists

	% Total	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
0 euro	9%	8%	12%	9%	13%	7%	9%	7%	12%
100 euros or less	12%	13%	15%	11%	10%	14%	15%	13%	10%
From 101 to 200 euros	24%	22%	29%	27%	24%	24%	21%	22%	26%
From 201 to 300 euros	24%	24%	16%	25%	23%	25%	22%	24%	23%
Over 300 euros	31%	32%	28%	28%	30%	31%	32%	32%	27%
Average (excluding 0€)	€357	€388	€323	€308	€346	€361	€375	€361	€350
Average (including 0€)	€325	€355	€284	€279	€301	€336	€342	€335	€306



The monthly budget for financing a new car



Italy
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	5%	5%	5%	2%	4%	5%	5%	6%	2%	7%	6%	3%
100 euros or less	24%	21%	27%	21%	24%	26%	28%	18%	24%	23%	31%	16%
From 101 to 200 euros	29%	28%	30%	29%	27%	29%	28%	30%	28%	29%	28%	27%
From 201 to 300 euros	21%	21%	22%	26%	22%	17%	23%	23%	21%	22%	20%	23%
Over 300 euros	20%	25%	15%	21%	24%	22%	14%	21%	23%	17%	14%	28%
Average (excluding 0€)	€286	€295	€277	€347	€301	€328	€228	€267	€308	€264	€285	€292
Average (including 0€)	€272	€281	€263	€339	€290	€313	€216	€250	€302	€245	€266	€283



The monthly budget for financing a new car



Italy
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
0 euro	5%	3%	8%	2%	6%	6%	7%	3%	4%	4%	8%
100 euros or less	24%	22%	23%	26%	23%	30%	26%	25%	19%	22%	29%
From 101 to 200 euros	29%	26%	31%	30%	34%	22%	31%	27%	30%	29%	29%
From 201 to 300 euros	21%	22%	19%	21%	22%	22%	20%	22%	21%	23%	16%
Over 300 euros	20%	25%	18%	21%	15%	17%	15%	22%	23%	21%	17%
Average (excluding 0€)	€286	€355	€258	€258	€255	€269	€254	€311	€287	€291	€268
Average (including 0€)	€272	€343	€238	€252	€241	€252	€236	€301	€275	€280	€246



The monthly budget for financing a new car



Spain
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
0 euro	8%	7%	9%	5%	6%	8%	8%	11%	6%	13%	12%	5%
100 euros or less	14%	11%	18%	21%	16%	14%	14%	12%	14%	15%	24%	9%
From 101 to 200 euros	23%	20%	26%	32%	23%	25%	22%	20%	23%	22%	26%	21%
From 201 to 300 euros	27%	28%	25%	18%	25%	27%	26%	30%	27%	26%	20%	30%
Over 300 euros	27%	32%	20%	23%	29%	25%	29%	27%	28%	23%	15%	34%
Average (excluding 0€)	€335	€365	€300	€391	€325	€317	€338	€339	€332	€341	€275	€367
Average (including 0€)	€307	€338	€272	€372	€306	€293	€309	€301	€311	€297	€240	€348



The monthly budget for financing a new car



Spain
1000
motorists

Q. What monthly budget could you set aside for financing a new car tomorrow?

Open-ended numerical question – Spontaneous responses

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
0 euro	8%	4%	5%	3%	9%	9%	9%	20%	9%	15%	7%	8%	8%
100 euros or less	14%	14%	10%	11%	14%	13%	18%	23%	19%	18%	13%	13%	16%
From 101 to 200 euros	23%	32%	20%	27%	20%	22%	22%	25%	32%	22%	22%	23%	24%
From 201 to 300 euros	27%	23%	32%	26%	31%	27%	26%	17%	20%	22%	28%	27%	25%
Over 300 euros	27%	24%	32%	32%	26%	27%	25%	15%	18%	23%	29%	27%	25%
Average (excluding 0€)	€335	€280	€435	€353	€328	€313	€349	€253	€315	€329	€339	€335	€333
Average (including 0€)	€307	€268	€413	€341	€299	€283	€317	€202	€285	€281	€316	€308	€305

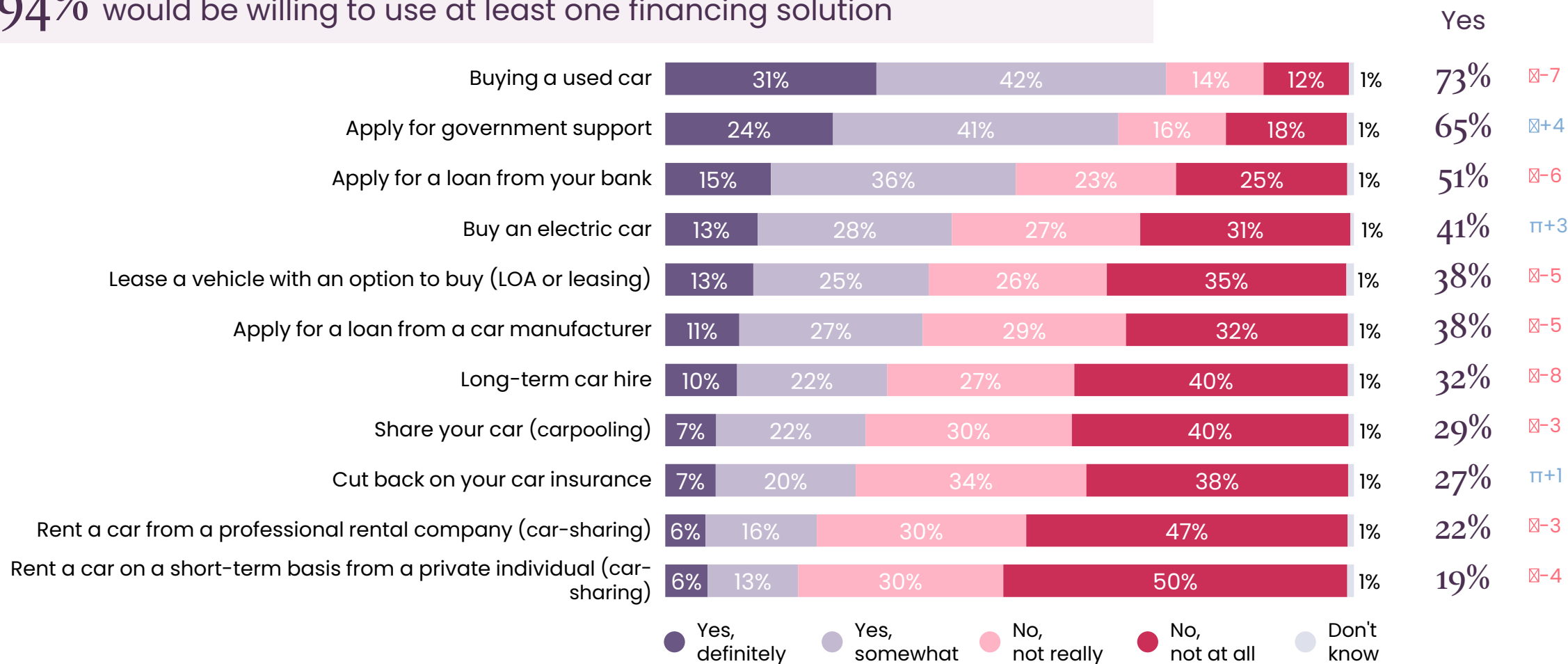
Options for financing a car



France
1000
motorists

Q. Would you personally be willing to use each of the following options to finance the day-to-day use of a car?

94% would be willing to use at least one financing solution



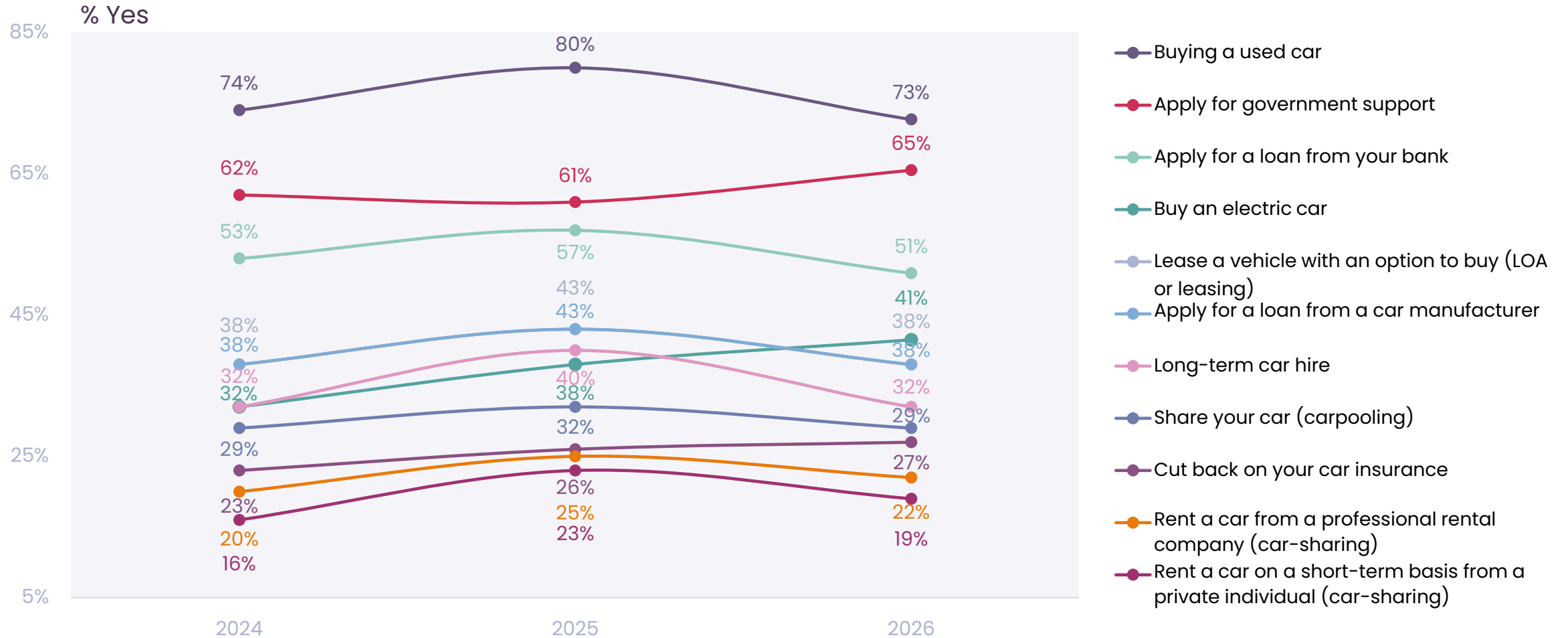


Options for financing a car



France
1000
motorists

Q. Would you personally be willing to use each of the following options to finance the day-to-day use of a car?



Options for financing a car



France
1000
motorists

Q. Would you personally be willing to use each of the following options to finance the day-to-day use of a car?

	% Yes	GENDER		AGE					STATUS		NET MONTHLY HOUSEHOLD INCOME OF THE HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Is considering at least one solution	94%	95%	94%	96%	94%	96%	95%	92%	95%	93%	93%	95%
Buying a used car	73%	70%	75%	77%	77%	77%	76%	62%	76%	68%	75%	71%
Apply for government support	65%	66%	66%	79%	73%	69%	66%	53%	71%	58%	70%	64%
Apply for a loan from your bank	51%	55%	47%	62%	55%	57%	51%	38%	56%	42%	47%	53%
Buy an electric car	41%	45%	38%	53%	54%	46%	35%	34%	47%	33%	35%	46%
Lease a vehicle with an option to buy (LOA or leasing)	38%	40%	37%	55%	48%	38%	34%	31%	41%	33%	34%	41%
Apply for a loan from a car manufacturer	38%	41%	34%	56%	49%	44%	31%	24%	43%	28%	39%	38%
Long-term car hire	32%	34%	31%	41%	37%	36%	28%	26%	35%	28%	30%	34%
Share your car (carpooling)	29%	30%	28%	62%	45%	33%	19%	15%	36%	18%	37%	26%
Cut back on your car insurance	27%	30%	26%	41%	35%	34%	28%	13%	33%	18%	38%	22%
Rent a car from a professional rental company (car-sharing)	22%	24%	20%	41%	41%	25%	16%	7%	28%	12%	25%	20%
Rent a car on a short-term basis from a private individual (car-sharing)	19%	22%	17%	37%	37%	22%	15%	5%	25%	9%	25%	17%

Options for financing a car



France
1000
motorists

Q. Would you personally be willing to use each of the following options to finance the day-to-day use of a car?

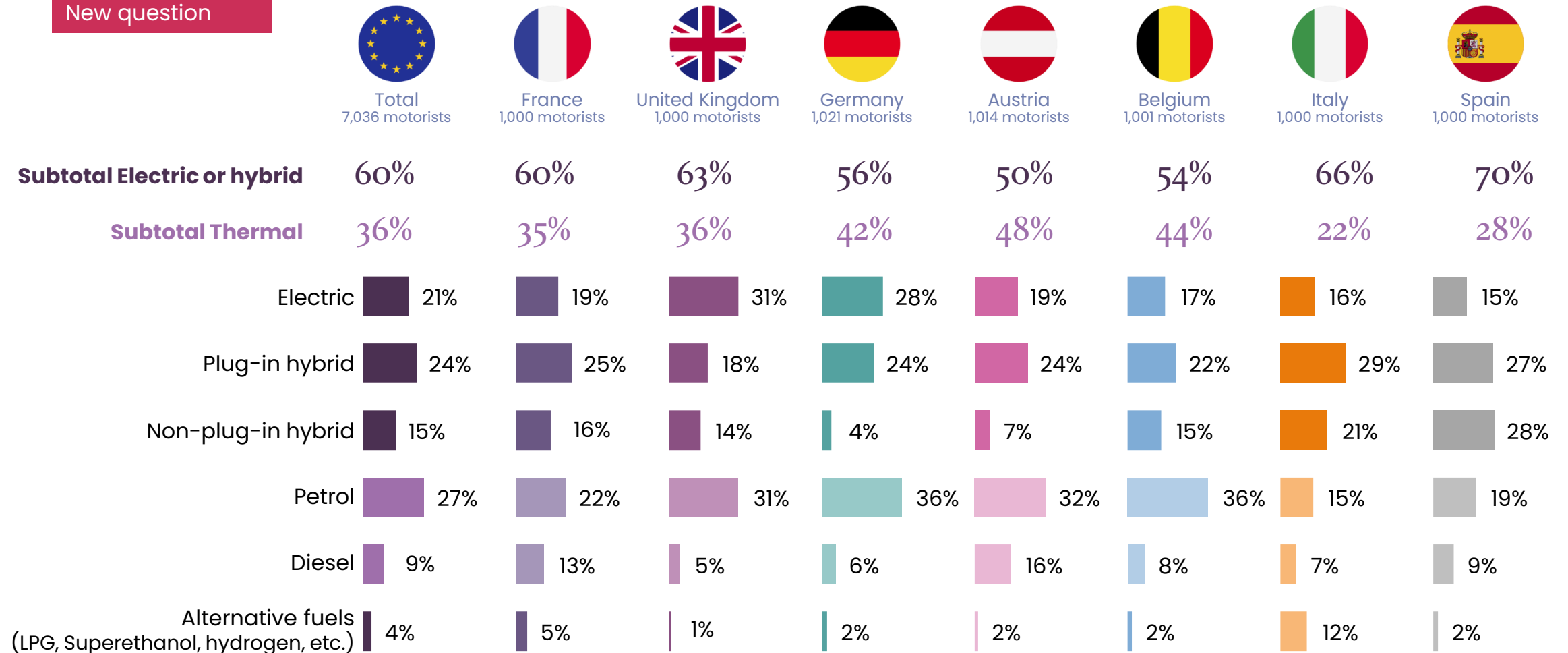
	% Yes	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Is considering at least one solution	94%	96%	96%	94%	92%	93%	93%	96%	94%	95%	92%
Buying a used car	73%	72%	75%	72%	68%	74%	73%	75%	71%	75%	67%
Apply for government support	65%	71%	66%	67%	66%	61%	63%	64%	69%	69%	58%
Apply for a loan from your bank	51%	51%	47%	55%	50%	50%	52%	49%	52%	55%	42%
Buy an electric car	41%	54%	41%	42%	36%	38%	35%	37%	50%	45%	33%
Lease a vehicle with an option to buy (LOA or leasing)	38%	45%	35%	39%	37%	38%	32%	34%	45%	41%	33%
Apply for a loan from a car manufacturer	38%	46%	31%	39%	32%	40%	29%	33%	45%	41%	30%
Long-term car hire	32%	39%	27%	35%	26%	34%	26%	29%	38%	34%	27%
Share your car (carpooling)	29%	31%	31%	29%	24%	28%	26%	27%	32%	32%	23%
Cut back on your car insurance	27%	26%	27%	28%	25%	30%	28%	23%	31%	29%	25%
Rent a car from a professional rental company (car-sharing)	22%	30%	17%	23%	19%	23%	14%	19%	29%	24%	18%
Rent a car on a short-term basis from a private individual (car-sharing)	19%	27%	17%	21%	14%	18%	12%	17%	26%	20%	18%



The type of engine you are considering when buying a new car

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question





The type of engine you are considering when buying a new car



France
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	60%	64%	56%	45%	65%	57%	59%	64%	60%	60%	49%	66%
Electric	19%	21%	17%	23%	27%	17%	15%	18%	20%	18%	16%	21%
Plug-in hybrid	25%	26%	25%	18%	21%	30%	24%	26%	25%	25%	23%	26%
Non-plug-in hybrid	16%	17%	14%	4%	17%	10%	20%	20%	15%	17%	10%	19%
Subtotal Thermal	35%	32%	38%	51%	34%	38%	34%	28%	36%	33%	45%	29%
Petrol	22%	21%	24%	41%	20%	21%	22%	20%	23%	21%	30%	18%
Diesel	13%	11%	14%	10%	14%	17%	12%	8%	13%	12%	15%	11%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	5%	4%	6%	2%	1%	5%	7%	7%	4%	6%	5%	5%



The type of engine you are considering when buying a new car



France
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	60%	76%	58%	56%	59%	56%	56%	56%	65%	63%	54%
Electric	19%	26%	18%	17%	16%	19%	18%	17%	21%	21%	15%
Plug-in hybrid	25%	31%	22%	26%	27%	23%	24%	24%	27%	27%	22%
Non-plug-in hybrid	16%	19%	18%	13%	16%	14%	14%	15%	17%	15%	17%
Subtotal Thermal	35%	19%	38%	38%	32%	40%	38%	37%	31%	33%	39%
Petrol	22%	12%	19%	24%	20%	31%	18%	25%	23%	20%	28%
Diesel	13%	7%	19%	14%	12%	9%	20%	12%	8%	13%	11%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	5%	4%	4%	6%	9%	4%	6%	6%	4%	4%	7%



The type of engine you are considering when buying a new car



United Kingdom
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	63%	64%	62%	72%	80%	64%	57%	50%	67%	54%	56%	66%
Electric	31%	34%	28%	48%	51%	27%	26%	18%	36%	23%	26%	34%
Plug-in hybrid	18%	18%	17%	22%	24%	20%	10%	13%	19%	14%	10%	21%
Non-plug-in hybrid	14%	12%	17%	2%	5%	17%	21%	19%	12%	17%	20%	11%
Subtotal Thermal	36%	34%	37%	27%	17%	35%	43%	49%	32%	44%	41%	33%
Petrol	31%	29%	33%	18%	16%	28%	38%	46%	27%	40%	35%	29%
Diesel	5%	5%	4%	9%	1%	7%	5%	3%	5%	4%	6%	4%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	1%	1%	1%	1%	3%	–	–	1%	1%	2%	3%	1%



The type of engine you are considering when buying a new car



United Kingdom
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	63%	58%	71%	79%	53%	72%	66%	45%	49%	59%	68%	63%	64%
Electric	31%	22%	41%	47%	21%	39%	28%	28%	16%	25%	38%	33%	27%
Plug-in hybrid	18%	18%	17%	26%	18%	21%	20%	6%	9%	16%	20%	17%	19%
Non-plug-in hybrid	14%	18%	13%	6%	14%	12%	18%	11%	24%	18%	10%	13%	18%
Subtotal Thermal	36%	39%	27%	21%	45%	27%	34%	55%	51%	40%	31%	36%	34%
Petrol	31%	31%	25%	18%	41%	23%	34%	50%	43%	35%	27%	31%	32%
Diesel	5%	8%	2%	3%	4%	4%	-	5%	8%	5%	4%	5%	2%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	1%	2%	2%	-	2%	1%	-	-	-	1%	1%	1%	2%



The type of engine you would consider when buying a new car

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?



Germany
1021
motorists

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	56%	60%	50%	56%	63%	53%	58%	49%	59%	46%	48%	60%
Electric	28%	31%	23%	29%	36%	26%	25%	25%	30%	22%	24%	29%
Plug-in hybrid	24%	24%	23%	20%	24%	24%	28%	19%	25%	20%	19%	26%
Non-plug-in hybrid	4%	5%	4%	7%	3%	3%	5%	5%	4%	4%	5%	5%
Subtotal Thermal	42%	37%	48%	40%	34%	45%	40%	47%	39%	51%	47%	39%
Petrol	36%	31%	41%	27%	27%	36%	37%	44%	33%	45%	43%	32%
Diesel	6%	6%	7%	13%	7%	9%	3%	3%	6%	6%	4%	7%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	3%	2%	4%	3%	2%	2%	4%	2%	3%	5%	1%



The type of engine you would consider when buying a new car

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question



Germany
1021
motorists

	% Total	REGION						TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	56%	52%	56%	51%	55%	64%	53%	51%	58%	58%	58%	50%
Electric	28%	29%	31%	28%	27%	27%	22%	22%	29%	32%	28%	25%
Plug-in hybrid	24%	22%	21%	19%	26%	29%	25%	24%	24%	23%	25%	21%
Non-plug-in hybrid	4%	1%	4%	4%	2%	8%	6%	5%	5%	3%	5%	4%
Subtotal Thermal	42%	47%	40%	45%	42%	35%	45%	47%	39%	40%	40%	47%
Petrol	36%	38%	33%	37%	34%	32%	41%	39%	33%	35%	33%	42%
Diesel	6%	9%	7%	8%	8%	3%	4%	8%	6%	5%	7%	5%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	1%	4%	4%	3%	1%	2%	2%	3%	2%	2%	3%



The type of engine you are considering when buying a new car



Austria
1014
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	50%	54%	46%	44%	47%	49%	55%	47%	51%	45%	43%	52%
Electric	19%	21%	18%	24%	21%	17%	21%	12%	21%	14%	16%	20%
Plug-in hybrid	24%	26%	22%	15%	20%	26%	26%	30%	24%	22%	20%	26%
Non-plug-in hybrid	7%	7%	6%	5%	6%	6%	8%	5%	6%	9%	7%	6%
Subtotal Thermal	48%	45%	53%	55%	53%	48%	44%	50%	48%	53%	55%	47%
Petrol	32%	28%	37%	30%	29%	34%	31%	39%	31%	38%	40%	29%
Diesel	16%	17%	16%	25%	24%	14%	13%	11%	17%	15%	15%	18%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	1%	1%	1%	–	3%	1%	2%	1%	2%	2%	1%



The type of engine you are considering when buying a new car



Austria
1014
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	REGION									TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder- österreich	Ober- österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	50%	61%	36%	48%	52%	38%	48%	53%	52%	56%	51%	42%	52%	48%	54%
Electric	19%	21%	18%	19%	21%	18%	19%	25%	7%	19%	20%	14%	21%	18%	23%
Plug-in hybrid	24%	26%	17%	23%	25%	15%	23%	17%	38%	29%	25%	21%	24%	24%	24%
Non-plug-in hybrid	7%	14%	1%	6%	6%	5%	6%	11%	7%	8%	6%	7%	7%	6%	7%
Subtotal Thermal	48%	39%	61%	51%	47%	58%	49%	44%	48%	43%	47%	56%	46%	51%	44%
Petrol	32%	23%	36%	38%	26%	43%	32%	26%	36%	31%	31%	40%	30%	33%	32%
Diesel	16%	16%	25%	13%	21%	15%	17%	18%	12%	12%	16%	16%	16%	18%	12%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	-	3%	1%	1%	4%	3%	3%	-	-	2%	2%	1%	1%	2%



The type of engine you are considering when buying a new car



Belgium
1001
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	54%	61%	47%	54%	54%	53%	58%	49%	61%	46%	44%	58%
Electric	17%	20%	14%	28%	17%	19%	11%	15%	22%	11%	13%	18%
Plug-in hybrid	22%	25%	19%	18%	26%	22%	21%	21%	24%	19%	17%	24%
Non-plug-in hybrid	15%	16%	14%	8%	11%	12%	26%	13%	15%	16%	14%	16%
Subtotal Thermal	44%	37%	51%	45%	46%	43%	38%	50%	38%	51%	53%	40%
Petrol	36%	30%	43%	31%	38%	36%	32%	42%	31%	42%	39%	34%
Diesel	8%	7%	8%	14%	8%	7%	6%	8%	7%	9%	14%	6%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	2%	2%	1%	–	3%	4%	1%	1%	3%	3%	2%



The type of engine you are considering when buying a new car

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question



Belgium
1001
motorists

	% Total	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	54%	52%	60%	55%	49%	56%	60%	56%	51%
Electric	17%	20%	17%	11%	13%	18%	22%	19%	14%
Plug-in hybrid	22%	19%	33%	24%	20%	23%	25%	21%	24%
Non-plug-in hybrid	15%	13%	10%	20%	16%	15%	13%	16%	13%
Subtotal Thermal	44%	47%	40%	41%	49%	42%	39%	42%	47%
Petrol	36%	38%	38%	33%	40%	35%	33%	34%	40%
Diesel	8%	9%	2%	8%	9%	7%	6%	8%	7%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	1%	–	4%	2%	2%	1%	2%	2%



The type of engine you are considering when buying a new car



Italy
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	66%	69%	62%	57%	55%	61%	74%	72%	65%	66%	61%	75%
Electric	16%	14%	17%	23%	12%	16%	17%	13%	17%	14%	16%	17%
Plug-in hybrid	29%	32%	27%	20%	24%	29%	29%	37%	30%	29%	26%	34%
Non-plug-in hybrid	21%	23%	18%	14%	19%	16%	28%	22%	18%	23%	19%	24%
Subtotal Thermal	22%	20%	25%	29%	33%	26%	17%	14%	23%	21%	26%	15%
Petrol	15%	15%	15%	9%	21%	18%	12%	13%	16%	14%	18%	11%
Diesel	7%	5%	10%	20%	12%	8%	5%	1%	7%	7%	8%	4%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	12%	11%	13%	10%	12%	13%	9%	14%	12%	12%	13%	10%



The type of engine you are considering when buying a new car



Italy
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	66%	71%	63%	62%	66%	63%	64%	65%	70%	66%	65%
Electric	16%	14%	11%	15%	20%	19%	11%	19%	17%	16%	13%
Plug-in hybrid	29%	33%	28%	24%	31%	32%	29%	28%	33%	30%	30%
Non-plug-in hybrid	21%	24%	24%	23%	15%	12%	24%	18%	20%	20%	22%
Subtotal Thermal	22%	20%	21%	21%	22%	31%	22%	23%	20%	22%	21%
Petrol	15%	15%	18%	14%	13%	14%	15%	15%	15%	15%	15%
Diesel	7%	5%	3%	7%	9%	17%	7%	8%	5%	7%	6%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	12%	9%	16%	17%	12%	4%	14%	11%	10%	12%	13%



The type of engine you are considering when buying a new car



Spain
1000
motorists

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Electric or hybrid	70%	75%	64%	58%	56%	75%	75%	69%	70%	69%	61%	75%
Electric	15%	17%	13%	19%	10%	21%	14%	12%	15%	15%	11%	18%
Plug-in hybrid	27%	28%	26%	21%	25%	30%	28%	24%	28%	23%	23%	29%
Non-plug-in hybrid	28%	30%	25%	18%	21%	24%	33%	33%	27%	31%	27%	28%
Subtotal Thermal	28%	22%	35%	40%	43%	23%	23%	28%	28%	28%	37%	23%
Petrol	19%	16%	22%	24%	29%	15%	14%	22%	18%	21%	24%	16%
Diesel	9%	6%	13%	16%	14%	8%	9%	6%	10%	7%	13%	7%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	3%	1%	2%	1%	2%	2%	3%	2%	3%	2%	2%



The type of engine you are considering when buying a new car

Q. If you were to buy a car tomorrow, would you opt for a vehicle ...?



Spain
1000
motorists

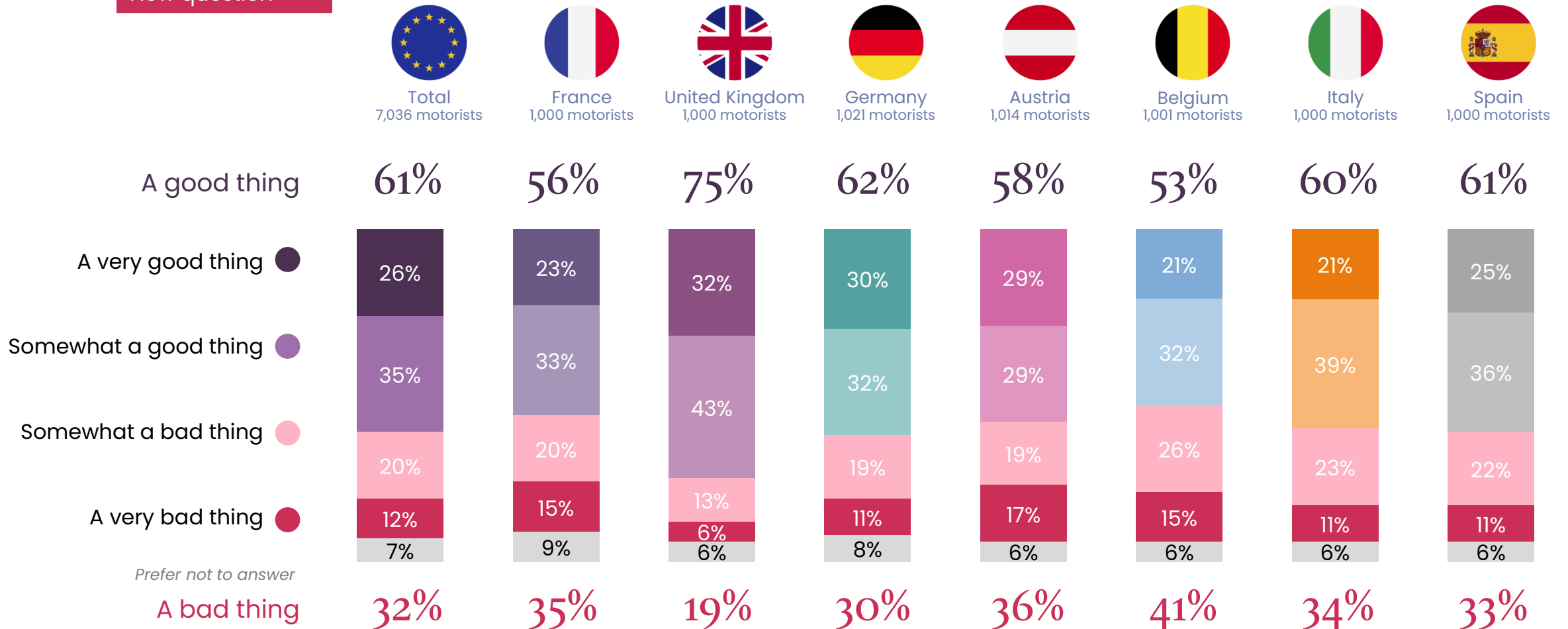
New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Electric or hybrid	70%	65%	77%	82%	67%	69%	68%	48%	62%	63%	73%	71%	67%
Electric	15%	13%	17%	14%	18%	15%	14%	13%	17%	15%	15%	16%	13%
Plug-in hybrid	27%	22%	32%	39%	22%	25%	27%	17%	20%	24%	29%	27%	27%
Non-plug-in hybrid	28%	30%	28%	29%	27%	29%	27%	18%	25%	24%	29%	28%	27%
Subtotal Thermal	28%	34%	23%	13%	32%	28%	31%	50%	36%	37%	25%	27%	30%
Petrol	19%	21%	13%	8%	22%	20%	19%	43%	19%	29%	17%	17%	23%
Diesel	9%	13%	10%	5%	10%	8%	12%	7%	17%	8%	8%	10%	7%
Alternative fuels (LPG, Superethanol, hydrogen, etc.)	2%	1%	–	4%	1%	3%	1%	2%	2%	–	2%	2%	3%

Public opinion on the ban on the sale of new cars *with internal combustion engines*

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question





Public opinion on the ban on the sale of new cars *with internal combustion engines*



France
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	56%	54%	58%	63%	69%	61%	50%	49%	59%	52%	56%	56%
...A very good thing	23%	23%	24%	27%	28%	23%	23%	21%	24%	23%	27%	22%
...Somewhat a good thing	33%	31%	34%	36%	41%	38%	27%	28%	35%	29%	29%	34%
Subtotal A bad thing	35%	36%	34%	26%	20%	32%	41%	43%	32%	40%	35%	35%
...Somewhat a bad thing	20%	18%	22%	23%	12%	16%	24%	24%	18%	24%	21%	20%
...A very bad thing	15%	18%	12%	3%	8%	16%	17%	19%	14%	16%	14%	15%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



France
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal A good thing	56%	61%	55%	56%	51%	58%	62%	49%	59%	57%	56%
...A very good thing	23%	22%	23%	26%	16%	27%	26%	22%	23%	24%	23%
...Somewhat a good thing	33%	39%	32%	30%	35%	31%	36%	27%	36%	33%	33%
Subtotal A bad thing	35%	28%	37%	34%	38%	36%	33%	40%	32%	33%	39%
...Somewhat a bad thing	20%	17%	24%	18%	22%	20%	20%	22%	19%	19%	23%
...A very bad thing	15%	11%	13%	16%	16%	16%	13%	18%	13%	14%	16%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



United Kingdom
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	75%	73%	77%	84%	77%	77%	71%	70%	76%	74%	77%	75%
...A very good thing	32%	32%	32%	41%	35%	29%	32%	29%	33%	31%	31%	34%
...Somewhat a good thing	43%	41%	45%	43%	42%	48%	39%	41%	43%	43%	46%	41%
Subtotal A bad thing	19%	20%	17%	8%	18%	18%	21%	22%	18%	19%	16%	19%
...Somewhat a bad thing	13%	12%	13%	8%	12%	12%	13%	16%	13%	12%	9%	14%
...A very bad thing	6%	8%	4%	–	6%	6%	8%	6%	5%	7%	7%	5%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



United Kingdom
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal A good thing	75%	77%	80%	75%	70%	81%	65%	71%	67%	74%	78%	77%	71%
...A very good thing	32%	35%	35%	38%	32%	33%	25%	23%	29%	29%	35%	32%	33%
...Somewhat a good thing	43%	42%	45%	37%	38%	48%	40%	48%	38%	45%	43%	45%	38%
Subtotal A bad thing	19%	19%	13%	19%	20%	18%	25%	17%	23%	20%	16%	16%	24%
...Somewhat a bad thing	13%	13%	6%	14%	15%	14%	18%	11%	17%	14%	11%	10%	19%
...A very bad thing	6%	6%	7%	5%	5%	4%	7%	6%	6%	6%	5%	6%	5%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Germany
1021
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	62%	62%	61%	63%	72%	60%	58%	58%	63%	59%	59%	63%
...A very good thing	30%	29%	30%	29%	36%	29%	29%	26%	31%	26%	28%	30%
...Somewhat a good thing	32%	33%	31%	34%	36%	31%	29%	32%	32%	33%	31%	33%
Subtotal A bad thing	30%	29%	32%	33%	21%	32%	32%	32%	29%	33%	33%	29%
...Somewhat a bad thing	19%	19%	19%	26%	17%	19%	16%	21%	18%	21%	18%	19%
...A very bad thing	11%	10%	13%	7%	4%	13%	16%	11%	11%	12%	15%	10%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Germany
1021
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION						TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Almost every day	At least once a week
Subtotal A good thing	62%	60%	61%	60%	62%	58%	68%	56%	63%	66%	62%	61%
...A very good thing	30%	26%	26%	31%	32%	26%	36%	27%	26%	34%	32%	24%
...Somewhat a good thing	32%	34%	35%	29%	30%	32%	32%	29%	37%	32%	30%	37%
Subtotal A bad thing	30%	34%	31%	28%	34%	32%	25%	35%	32%	24%	31%	29%
...Somewhat a bad thing	19%	20%	21%	21%	21%	18%	15%	22%	19%	15%	20%	17%
...A very bad thing	11%	14%	10%	7%	13%	14%	10%	13%	13%	9%	11%	12%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Austria
1014
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	58%	57%	59%	75%	65%	55%	51%	60%	58%	58%	58%	59%
...A very good thing	29%	30%	28%	36%	30%	27%	27%	31%	28%	30%	31%	29%
...Somewhat a good thing	29%	27%	31%	39%	35%	28%	24%	29%	30%	28%	27%	30%
Subtotal A bad thing	36%	36%	36%	21%	27%	39%	43%	37%	36%	37%	35%	36%
...Somewhat a bad thing	19%	17%	21%	10%	18%	20%	23%	16%	19%	19%	17%	19%
...A very bad thing	17%	19%	15%	11%	9%	19%	20%	21%	17%	18%	18%	17%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Austria
1014
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION										TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder- österreich	Ober- österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week	
Subtotal A good thing	58%	57%	54%	53%	53%	63%	63%	59%	52%	67%	55%	58%	62%	59%	55%	
...A very good thing	29%	25%	21%	27%	25%	36%	29%	31%	29%	35%	28%	27%	30%	31%	24%	
...Somewhat a good thing	29%	32%	33%	26%	28%	27%	34%	28%	23%	32%	27%	31%	32%	28%	31%	
Subtotal A bad thing	36%	43%	42%	41%	39%	33%	31%	36%	43%	27%	40%	38%	31%	36%	38%	
...Somewhat a bad thing	19%	20%	19%	24%	22%	13%	12%	18%	24%	17%	21%	22%	15%	18%	22%	
...A very bad thing	17%	23%	23%	17%	17%	20%	19%	18%	19%	10%	19%	16%	16%	18%	16%	



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Belgium
1001
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	53%	53%	53%	64%	73%	48%	50%	45%	59%	46%	55%	54%
...A very good thing	21%	23%	19%	21%	31%	19%	22%	17%	24%	18%	20%	22%
...Somewhat a good thing	32%	30%	34%	43%	42%	29%	28%	28%	35%	28%	35%	32%
Subtotal A bad thing	41%	41%	41%	34%	26%	42%	44%	48%	34%	49%	41%	40%
...Somewhat a bad thing	26%	24%	27%	31%	15%	25%	23%	33%	21%	31%	25%	25%
...A very bad thing	15%	17%	14%	3%	11%	17%	21%	15%	13%	18%	16%	15%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Belgium
1001
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal A good thing	53%	50%	66%	56%	50%	54%	59%	55%	50%
...A very good thing	21%	17%	33%	26%	21%	21%	23%	23%	18%
...Somewhat a good thing	32%	33%	33%	30%	29%	33%	36%	32%	32%
Subtotal A bad thing	41%	44%	27%	38%	45%	39%	35%	38%	45%
...Somewhat a bad thing	26%	27%	21%	23%	27%	25%	24%	24%	28%
...A very bad thing	15%	17%	6%	15%	18%	14%	11%	14%	17%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Italy
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	60%	62%	58%	71%	58%	62%	57%	59%	63%	58%	56%	66%
...A very good thing	21%	22%	21%	24%	18%	24%	23%	19%	24%	19%	21%	23%
...Somewhat a good thing	39%	40%	37%	47%	40%	38%	34%	40%	39%	39%	35%	43%
Subtotal A bad thing	34%	32%	35%	23%	33%	31%	39%	34%	30%	36%	37%	29%
...Somewhat a bad thing	23%	20%	26%	14%	22%	23%	26%	22%	21%	24%	25%	19%
...A very bad thing	11%	12%	9%	9%	11%	8%	13%	12%	9%	12%	12%	10%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Italy
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal A good thing	60%	57%	59%	62%	63%	61%	58%	58%	65%	61%	58%
...A very good thing	21%	19%	20%	21%	24%	26%	18%	22%	24%	23%	17%
...Somewhat a good thing	39%	38%	39%	41%	39%	35%	40%	36%	41%	38%	41%
Subtotal A bad thing	34%	35%	37%	33%	29%	35%	37%	35%	27%	32%	39%
...Somewhat a bad thing	23%	24%	25%	20%	20%	26%	27%	23%	18%	22%	25%
...A very bad thing	11%	11%	12%	13%	9%	9%	10%	12%	9%	10%	14%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Spain
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal A good thing	61%	62%	60%	63%	71%	59%	62%	56%	64%	55%	62%	61%
...A very good thing	25%	28%	22%	25%	27%	25%	28%	21%	27%	20%	23%	26%
...Somewhat a good thing	36%	34%	38%	38%	44%	34%	34%	35%	37%	35%	39%	35%
Subtotal A bad thing	33%	33%	34%	29%	25%	36%	31%	39%	30%	41%	33%	33%
...Somewhat a bad thing	22%	20%	25%	26%	14%	25%	19%	26%	19%	29%	20%	23%
...A very bad thing	11%	13%	9%	3%	11%	11%	12%	13%	11%	12%	13%	10%



Public opinion on the ban on the sale of new cars *with internal combustion engines*



Spain
1000
motorists

Q. The European Union has decided not to ban the sale of new cars with internal combustion engines (petrol and diesel) from 2035. Would you say this decision is a good or a bad thing?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal A good thing	61%	60%	63%	63%	56%	60%	64%	59%	56%	54%	64%	62%	59%
...A very good thing	25%	24%	19%	31%	27%	22%	28%	21%	23%	18%	27%	28%	19%
...Somewhat a good thing	36%	36%	44%	32%	29%	38%	36%	38%	33%	36%	37%	34%	40%
Subtotal A bad thing	33%	34%	29%	29%	35%	35%	32%	41%	38%	42%	30%	33%	35%
...Somewhat a bad thing	22%	21%	19%	20%	21%	23%	23%	27%	21%	28%	21%	22%	23%
...A very bad thing	11%	13%	10%	9%	14%	12%	9%	14%	17%	14%	9%	11%	12%

3



The approach to
reconditioned used
cars



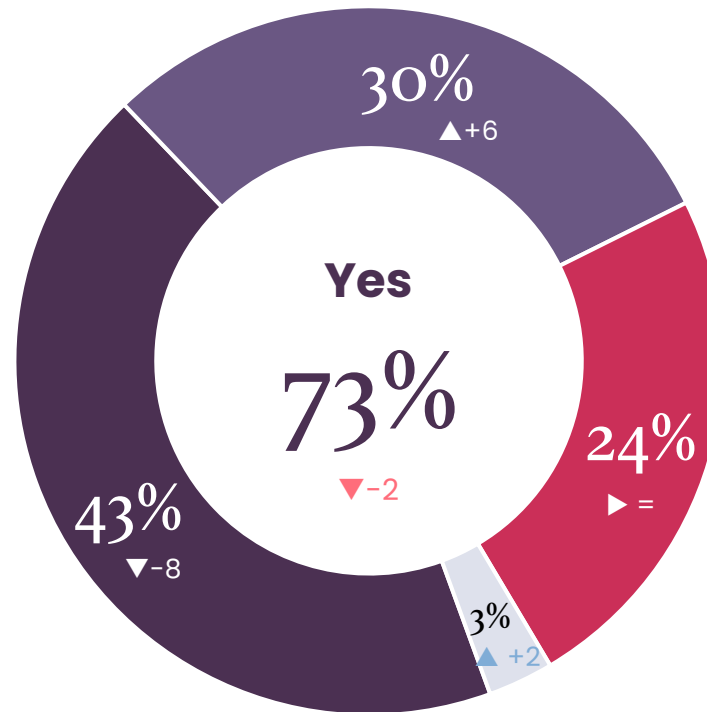
The popularity of refurbished used cars



France
1000
motorists

Q. Have you ever heard of 'refurbished used cars'?

Yes, but you don't know what it is



No

NSP

Yes, and you know what they are

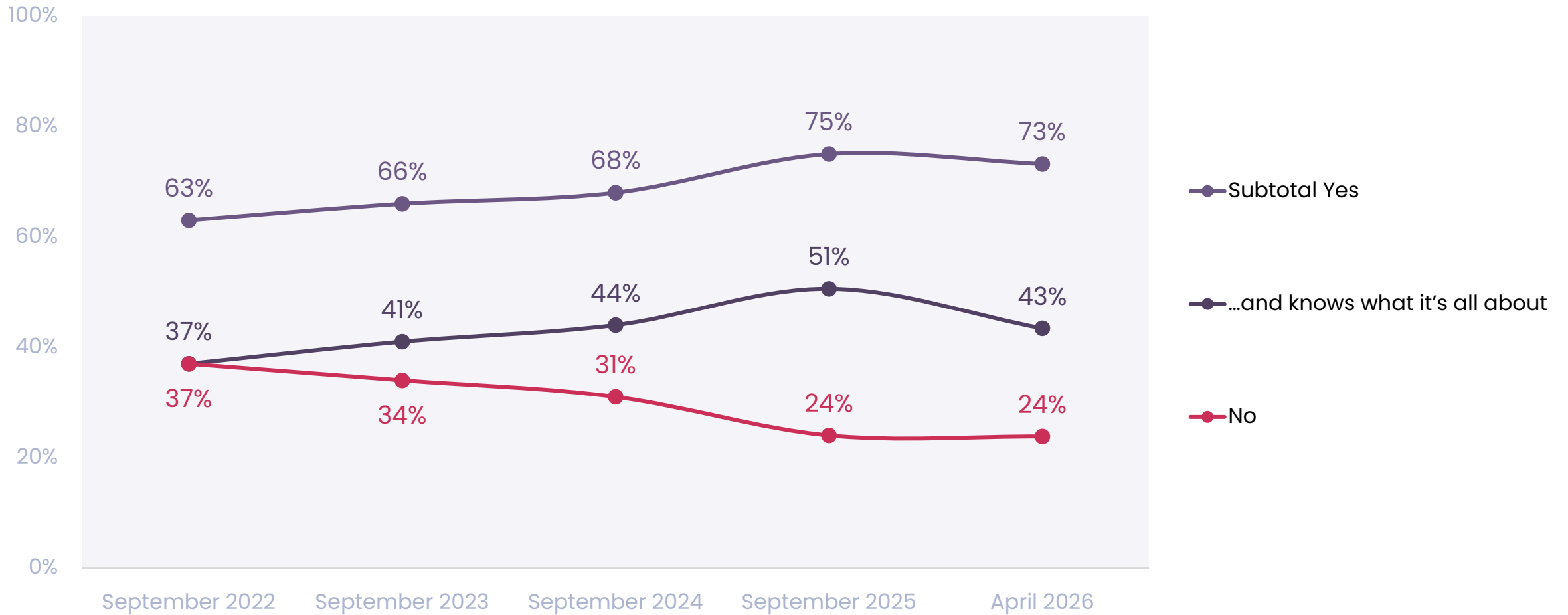


The popularity of refurbished used cars



France
1000
motorists

Q. Have you ever heard of 'refurbished used cars'?





The popularity of refurbished used cars



France
1000
motorists

Q. Have you ever heard of 'refurbished used cars'?

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Yes	73%	82%	65%	77%	78%	66%	75%	75%	74%	71%	70%	75%
...Yes, and you know what it is	43%	54%	34%	47%	39%	41%	45%	45%	45%	40%	40%	45%
...Yes, but you don't know what it is	30%	28%	31%	30%	39%	25%	30%	30%	29%	31%	30%	30%
No	24%	15%	32%	17%	19%	33%	23%	20%	24%	24%	25%	23%



The popularity of refurbished used cars

Q. Have you ever heard of 'refurbished used cars'?



France
1000
motorists

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Yes	73%	78%	71%	68%	75%	76%	69%	71%	77%	74%	71%
...Yes, and do you know what it is?	43%	42%	41%	42%	40%	49%	38%	45%	45%	46%	38%
...Yes, but you don't know what it's all about	30%	36%	30%	26%	35%	27%	31%	26%	32%	28%	33%
No	24%	19%	26%	30%	19%	21%	28%	26%	20%	23%	26%



Public perception of reconditioned used cars

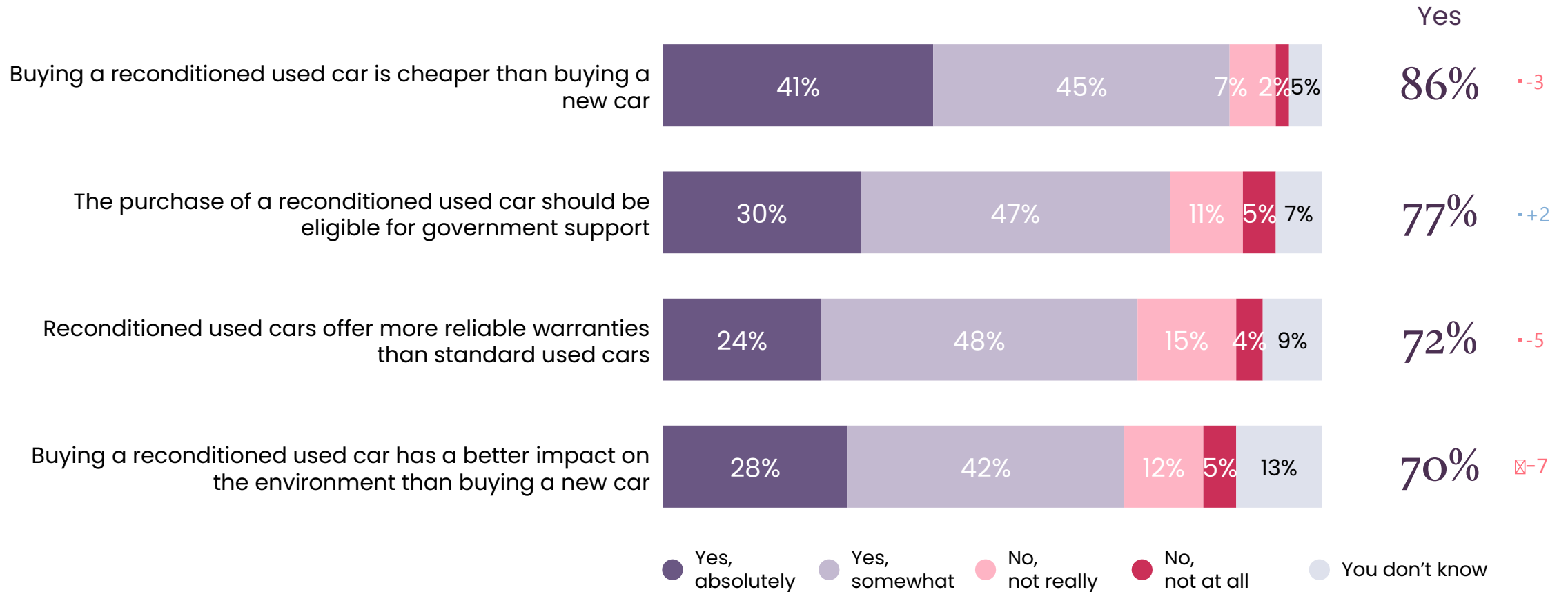


France
730
motorists

'A reconditioned used car undergoes a thorough inspection by a mechanic. They list any visible defects on the bodywork, as well as any mechanical, electronic and electrical issues, before repairing them. The buyer benefits from a car in excellent working order at a lower price than a new vehicle.'

Q. Would you say that... ?

Question asked only to respondents who have already heard of 'refurbished used cars'. i.e. 73% of the sample.





Public perception of reconditioned used cars



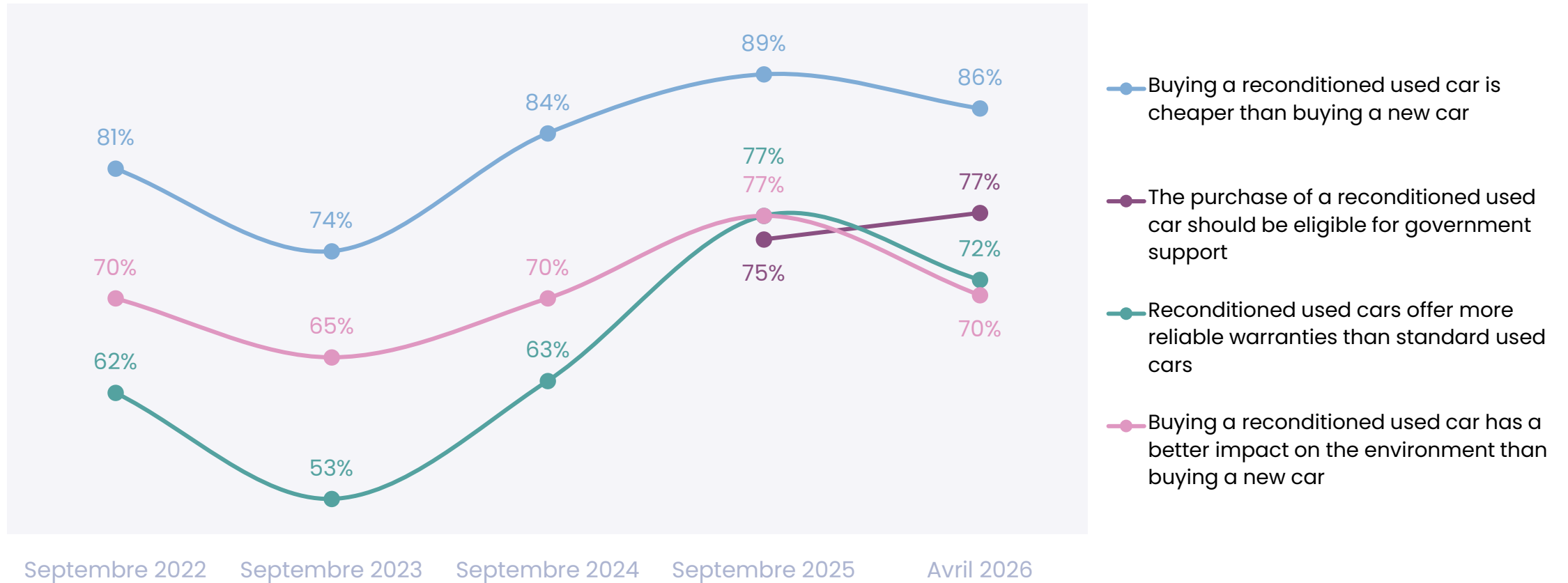
France
730
motorists

'A reconditioned used car undergoes a thorough inspection by a mechanic. They list any visible defects on the bodywork, as well as any mechanical, electronic and electrical issues, before repairing them. The buyer benefits from a car in excellent working order at a lower price than a new vehicle.'

Q. Would you say that... ?

Question asked only to respondents who have already heard of 'refurbished used cars'. i.e. 73% of the sample.

% Yes





Public perception of reconditioned used cars



France
730
motorists

'A reconditioned used car undergoes a thorough inspection by a mechanic. They list any visible defects on the bodywork, as well as any mechanical, electronic and electrical issues, before repairing them. The buyer benefits from a car in excellent working order at a lower price than a new vehicle.'

Q. Would you say that... ?

Question asked only to respondents who have already heard of 'refurbished used cars'. i.e. 73% of the sample.

	% Yes	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18-24 years	25-34 years	35-49 years	50-64 years	65 and over	Working	Not in work	Low	High
Buying a reconditioned used car is cheaper than buying a new car	86%	87%	85%	87%	79%	87%	86%	89%	85%	86%	87%	86%
The purchase of a reconditioned used car should be eligible for government support	77%	76%	79%	80%	80%	84%	75%	71%	81%	72%	80%	77%
Reconditioned used cars offer more reliable warranties than standard used cars	72%	70%	73%	68%	69%	74%	72%	72%	74%	68%	69%	74%
Buying a reconditioned used car has a better impact on the environment than buying a new car	70%	71%	70%	73%	76%	78%	70%	58%	74%	64%	67%	73%



Public perception of reconditioned used cars



France
730
motorists

'A reconditioned used car undergoes a thorough inspection by a mechanic. They list any visible defects on the bodywork, as well as any mechanical, electronic and electrical issues, before repairing them. The buyer benefits from a car in excellent working order at a lower price than a new vehicle.'

Q. Would you say that... ?

Question asked only to respondents who have already heard of 'refurbished used cars'. i.e. 73% of the sample.

	% Yes	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Ile-de-France	North West	North East	South West	South East	Rural	Suburban	Urban	Every day or almost	At least once a week
Buying a reconditioned used car is cheaper than buying a new car	86%	86%	86%	87%	86%	86%	85%	89%	84%	86%	87%
The purchase of a reconditioned used car should be eligible for government support	77%	77%	72%	79%	79%	79%	76%	80%	76%	80%	72%
Reconditioned used cars offer more reliable warranties than standard used cars	72%	76%	64%	74%	79%	71%	72%	70%	73%	73%	70%
Buying a reconditioned used car has a better impact on the environment than buying a new car	70%	76%	67%	69%	76%	68%	71%	69%	71%	71%	69%



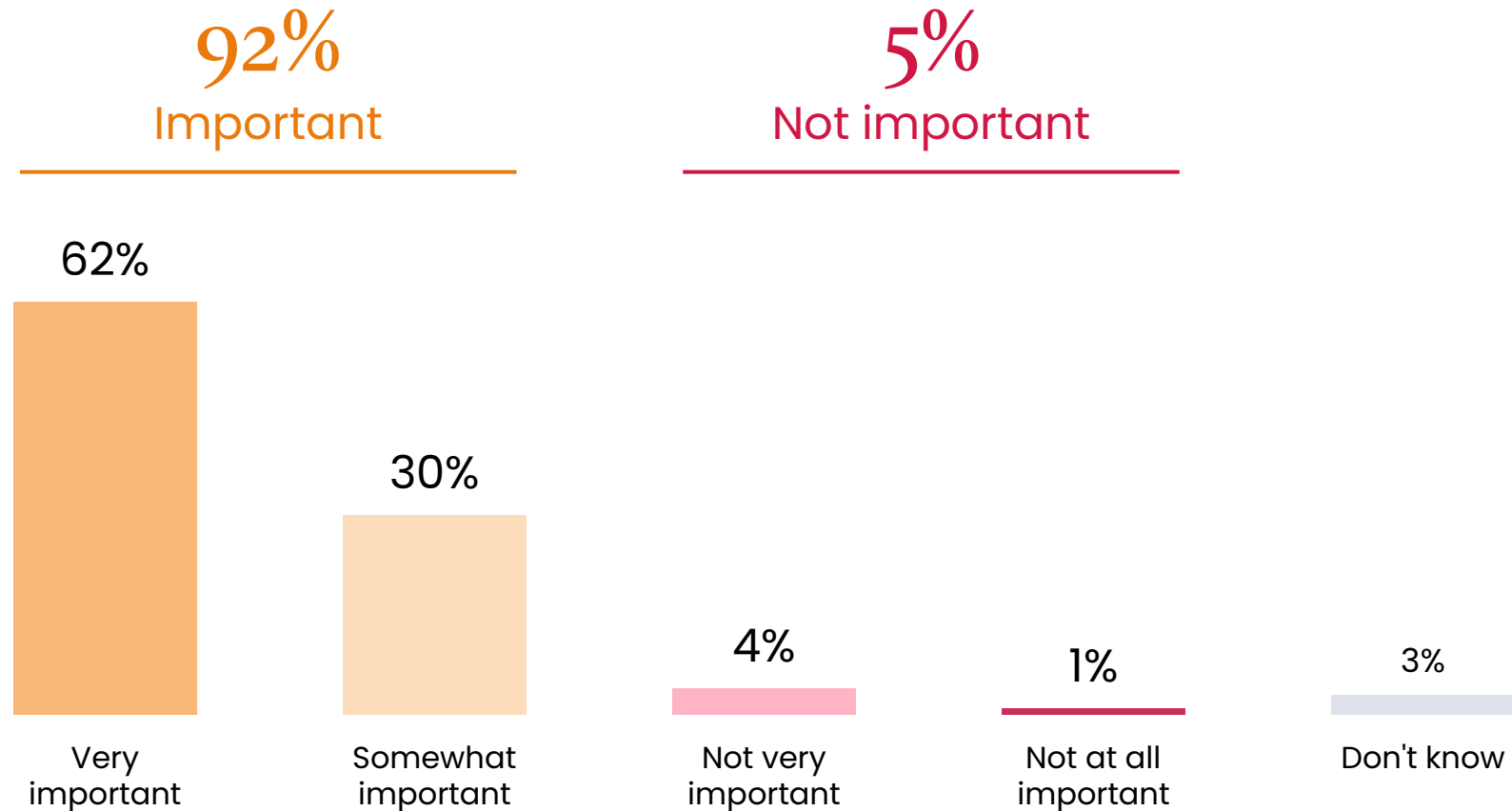
The importance of inspecting a refurbished used car before buying



Italy
1000
motorists

Q. How important is it to you to inspect a refurbished used car in person before purchasing?

New question





The importance of inspecting a refurbished used car before buying



Italy
1000
motorists

Q. How important is it to you to inspect a refurbished used car in person before purchasing?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal Important	92%	92%	91%	94%	92%	91%	95%	88%	92%	92%	92%	93%
...Very important	62%	63%	60%	55%	56%	60%	65%	64%	60%	63%	63%	61%
...Somewhat important	30%	29%	31%	39%	36%	31%	30%	24%	32%	29%	29%	32%
Subtotal Not important	5%	5%	6%	3%	3%	8%	3%	7%	5%	6%	6%	4%
...Not very important	4%	4%	5%	3%	3%	6%	2%	5%	5%	4%	5%	3%
...Not at all important	1%	1%	1%	–	–	2%	1%	2%	–	2%	1%	1%



The importance of inspecting a refurbished used car before buying



Italy
1000
motorists

Q. How important is it to you to inspect a refurbished used car in person before purchasing?

New question

	% Total	REGION					TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal Important	92%	91%	92%	92%	92%	89%	93%	92%	90%	92%	92%
...Very important	62%	60%	59%	62%	65%	58%	62%	61%	62%	61%	63%
...Somewhat important	30%	31%	33%	30%	27%	31%	31%	31%	28%	31%	29%
Subtotal Not important	5%	6%	5%	5%	6%	6%	4%	6%	6%	5%	6%
...Not very important	4%	4%	5%	3%	6%	5%	3%	5%	5%	4%	5%
...Not at all important	1%	2%	–	2%	–	1%	1%	1%	1%	1%	1%



4

*The stance of
Europeans*
towards the
measures taken in
their country



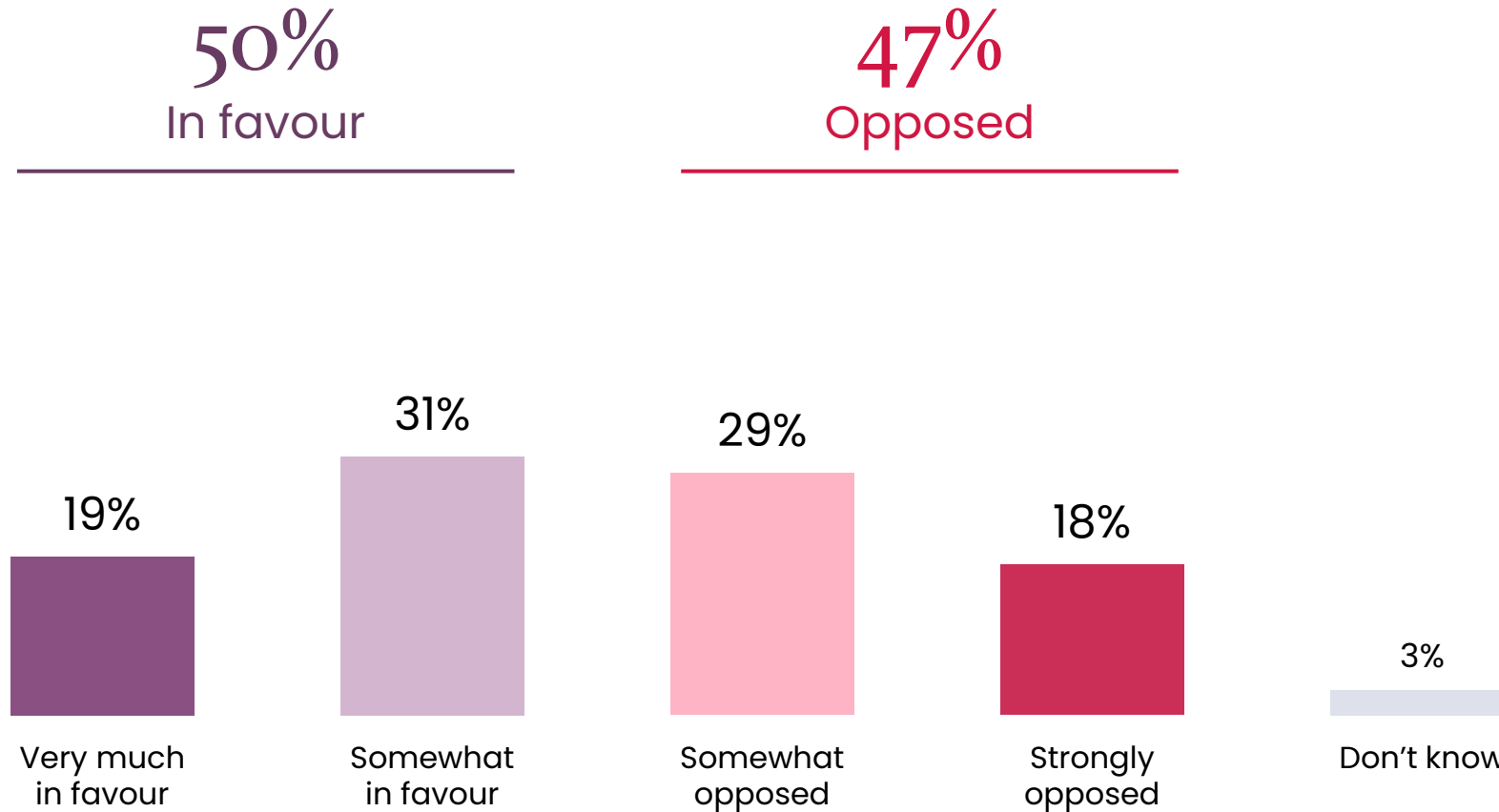
Support for a mileage tax on electric vehicles

Q. From 2028, drivers of electric vehicles will have to pay a mileage tax on all distances travelled. Are you in favour of or opposed to this measure?

New question



United Kingdom
1000
motorists





Support for a mileage tax on electric vehicles

Q. From 2028, drivers of electric vehicles will have to pay a mileage tax on all distances travelled.
Are you in favour of or opposed to this measure?

New question



United Kingdom
1000
motorists

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	50%	53%	47%	48%	50%	44%	50%	58%	50%	49%	55%	49%
...Very much in favour	19%	20%	17%	12%	20%	14%	18%	27%	18%	19%	21%	18%
...Somewhat in favour	31%	33%	30%	36%	30%	30%	32%	31%	32%	30%	34%	31%
Subtotal Opposed	47%	44%	50%	49%	46%	54%	47%	39%	47%	48%	43%	48%
...Somewhat opposed	29%	27%	31%	37%	29%	34%	29%	19%	31%	26%	23%	31%
...Strongly opposed	18%	17%	19%	12%	17%	20%	18%	20%	16%	22%	20%	17%



Support for a mileage tax on electric vehicles



United Kingdom
1000
motorists

Q. From 2028, drivers of electric vehicles will have to pay a mileage tax on all distances travelled.
Are you in favour of or opposed to this measure?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		South East & Anglia	Midlands	Greater London	North & Yorkshire	North West	Scotland	South West & Wales	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	50%	52%	46%	59%	44%	40%	54%	62%	54%	49%	50%	50%	49%
...Very much in favour	19%	23%	17%	19%	14%	15%	21%	16%	24%	18%	18%	19%	17%
...Somewhat in favour	31%	29%	29%	40%	30%	25%	33%	46%	30%	31%	32%	31%	32%
Subtotal Opposed	47%	47%	53%	36%	50%	56%	43%	36%	42%	49%	47%	47%	49%
...Somewhat opposed	29%	29%	35%	25%	22%	37%	30%	20%	23%	29%	30%	29%	29%
...Strongly opposed	18%	18%	18%	11%	28%	19%	13%	16%	19%	20%	17%	18%	20%



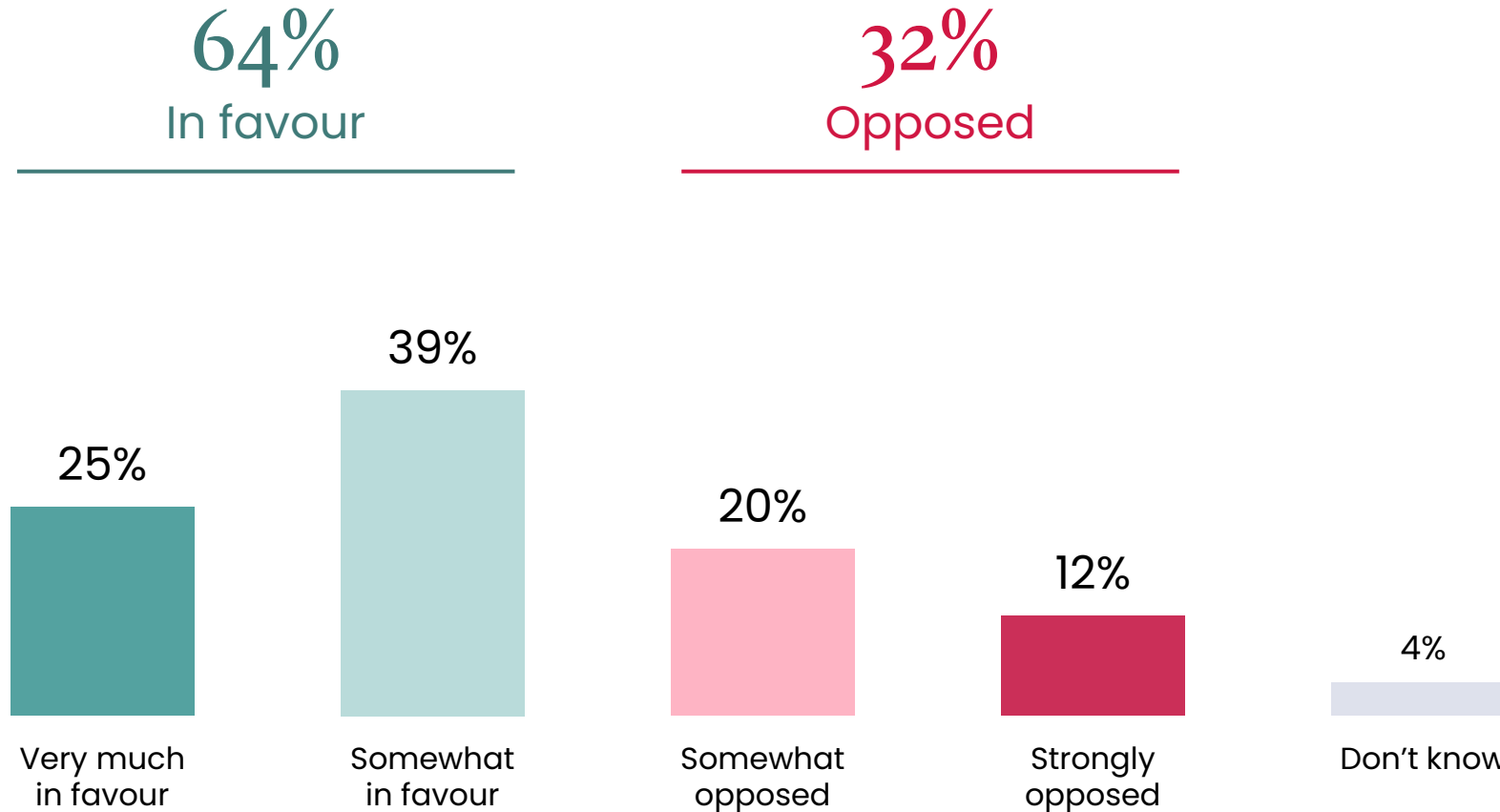
Support for extending the exemption from the annual tax on electric vehicles



Germany
1021
motorists

Q. The federal government has passed a law extending the exemption from the annual tax on electric vehicles.
Are you in favour of or opposed to this measure?

New question





Support for extending the exemption from the annual tax on electric vehicles



Germany
1021
motorists

Q. The federal government has passed a law extending the exemption from the annual tax on electric vehicles.
Are you in favour of or opposed to this measure?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	64%	64%	63%	72%	74%	63%	58%	59%	65%	59%	61%	66%
...Very much in favour	25%	27%	23%	20%	26%	22%	26%	27%	24%	26%	21%	27%
...Somewhat in favour	39%	37%	40%	52%	48%	41%	32%	32%	41%	33%	40%	39%
Subtotal Opposed	32%	32%	32%	27%	22%	33%	37%	35%	31%	36%	34%	30%
...Somewhat opposed	20%	21%	20%	22%	18%	22%	22%	18%	20%	22%	21%	19%
...Strongly opposed	12%	11%	12%	5%	4%	11%	15%	17%	11%	14%	13%	11%



Support for extending the exemption from the annual tax on electric vehicles



Germany
1021
motorists

Q. The federal government has passed a law extending the exemption from the annual tax on electric vehicles.
Are you in favour of or opposed to this measure?

New question

	% Total	REGION						TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		North-West	North Rhine-Westphalia	Central-West	South-West	South-East	East	Rural	Suburban	Urban	Almost every day	At least once a week
Subtotal In favour	64%	66%	65%	63%	65%	66%	57%	61%	59%	69%	64%	61%
...Very much in favour	25%	28%	27%	24%	23%	24%	22%	25%	20%	28%	25%	23%
...Somewhat in favour	39%	38%	38%	39%	42%	42%	35%	36%	39%	41%	39%	38%
Subtotal Opposed	32%	27%	31%	31%	32%	29%	41%	35%	36%	27%	32%	33%
...Somewhat opposed	20%	18%	21%	20%	22%	16%	25%	22%	23%	17%	21%	19%
...Strongly opposed	12%	9%	10%	11%	10%	13%	16%	13%	13%	10%	11%	14%



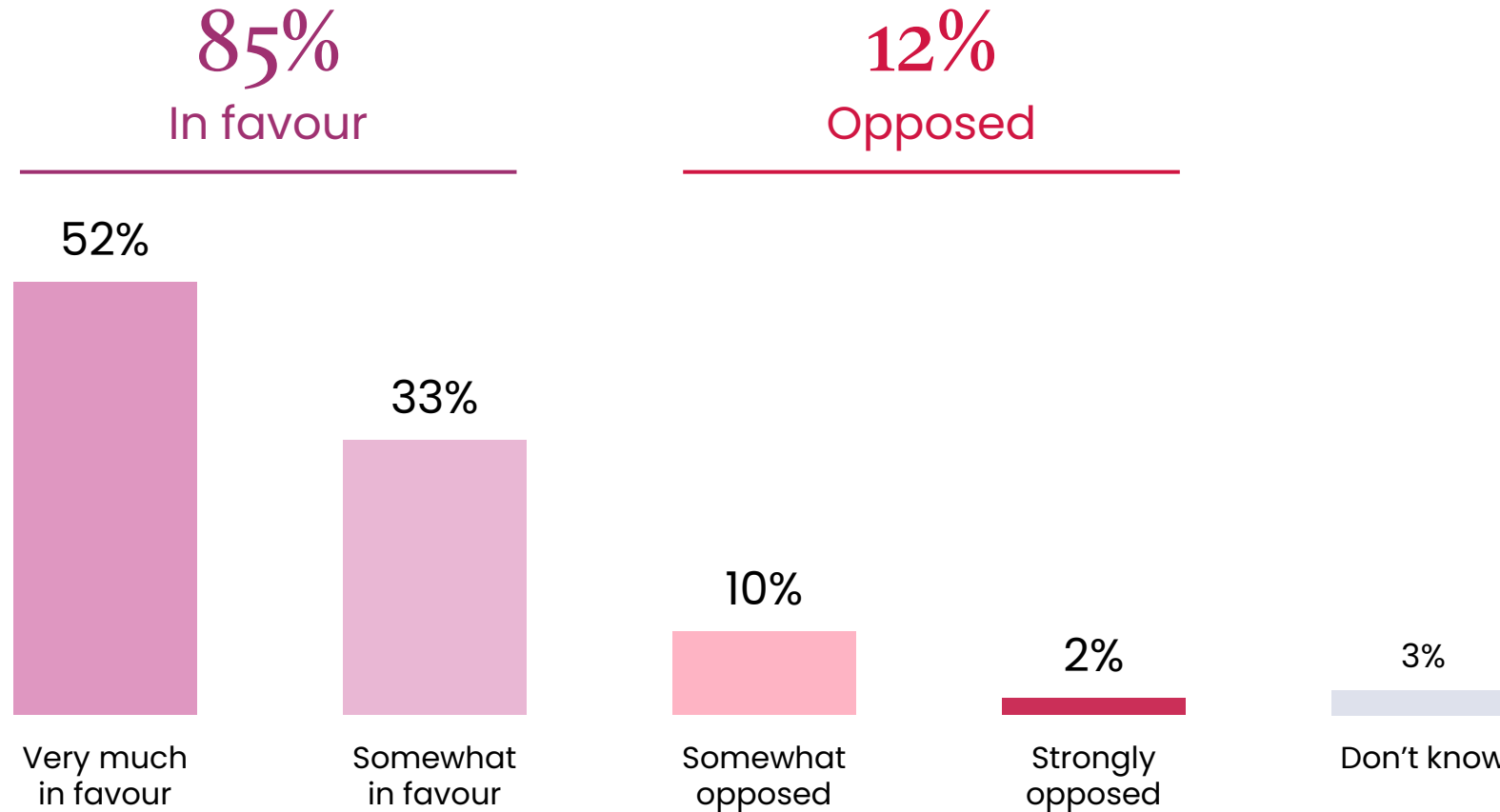
Support for the temporary reduction in fuel duty



Austria
1014
motorists

Q. The government has announced a temporary reduction in fuel tax. Are you in favour of or opposed to this measure?

New question





Support for the temporary reduction in fuel duty



Austria
1014
motorists

Q. The government has announced a temporary reduction in fuel tax. Are you in favour of or opposed to this measure?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	85%	83%	87%	86%	87%	86%	85%	81%	85%	85%	87%	84%
...Very much in favour	52%	49%	56%	48%	49%	51%	57%	52%	52%	54%	48%	53%
...Somewhat in favour	33%	34%	31%	38%	38%	35%	28%	29%	33%	31%	39%	31%
Subtotal Opposed	12%	14%	10%	10%	11%	12%	13%	14%	12%	12%	10%	13%
...Somewhat opposed	10%	11%	9%	9%	10%	10%	10%	12%	10%	9%	7%	11%
...Strongly opposed	2%	3%	1%	1%	1%	2%	3%	2%	2%	3%	3%	2%



Support for the temporary reduction in fuel duty



Austria
1014
motorists

Q. The government has announced a temporary reduction in fuel tax. Are you in favour of or opposed to this measure?

New question

	% Total	REGION										TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Burgenland *	Kärnten	Nieder- österreich	Ober- österreich	Salzburg	Steiermark	Tirol	Vorarlberg *	Wien	Rural	Suburban	Urban	Every day or almost	At least once a week	
Subtotal In favour	85%	82%	76%	88%	86%	89%	87%	79%	86%	85%	82%	89%	86%	86%	83%	
...Very much in favour	52%	50%	38%	55%	57%	63%	52%	57%	38%	49%	55%	52%	48%	55%	47%	
...Somewhat in favour	33%	32%	38%	33%	29%	26%	35%	22%	48%	36%	27%	37%	38%	31%	36%	
Subtotal Opposed	12%	10%	19%	11%	12%	9%	12%	17%	12%	11%	15%	10%	11%	11%	15%	
...Somewhat opposed	10%	10%	16%	9%	10%	9%	8%	14%	10%	8%	12%	8%	9%	10%	11%	
...Strongly opposed	2%	–	3%	2%	2%	–	4%	3%	2%	3%	3%	2%	2%	1%	4%	



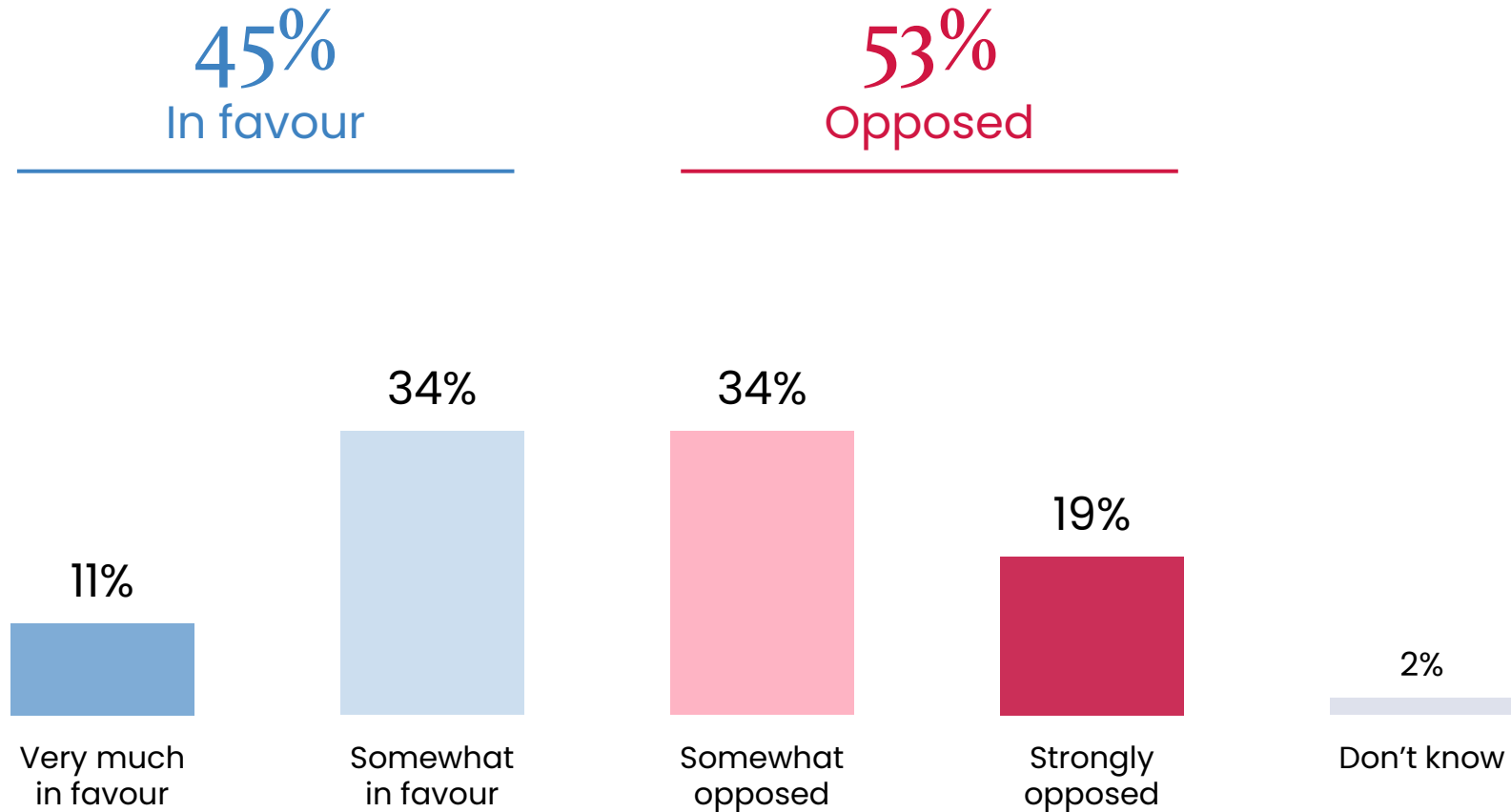
Support for restricting access to city centres for certain vehicles



Belgium
1001
motorists

Q. In several major cities (Brussels, Antwerp, etc.), Low Emission Zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question





Support for restricting access to city centres for certain vehicles

Q. In several major cities (Brussels, Antwerp, etc.), Low Emission Zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question



Belgium
1001
motorists

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	45%	43%	46%	55%	56%	45%	36%	40%	49%	39%	47%	44%
...Very much in favour	11%	10%	12%	4%	24%	7%	13%	6%	13%	8%	16%	10%
...Somewhat in favour	34%	33%	34%	51%	32%	38%	23%	34%	36%	31%	31%	34%
Subtotal Opposed	53%	55%	51%	41%	42%	52%	62%	58%	48%	59%	48%	54%
...Somewhat opposed	34%	32%	35%	28%	27%	35%	39%	33%	31%	37%	32%	33%
...Strongly opposed	19%	23%	16%	13%	15%	17%	23%	25%	17%	22%	16%	21%



Support for restricting access to city centres for certain vehicles



Belgium
1001
motorists

Q. In several major cities (Brussels, Antwerp, etc.), Low Emission Zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question

	% Total	REGION			TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Flemish	Brussels-Capital	Wallonia	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	45%	42%	65%	43%	42%	44%	57%	45%	44%
...Very much in favour	11%	9%	20%	11%	8%	11%	18%	11%	10%
...Somewhat in favour	34%	33%	45%	32%	34%	33%	39%	34%	34%
Subtotal Opposed	53%	56%	32%	54%	54%	55%	40%	52%	54%
...Somewhat opposed	34%	37%	17%	32%	32%	37%	22%	32%	36%
...Strongly opposed	19%	19%	15%	22%	22%	18%	18%	20%	18%



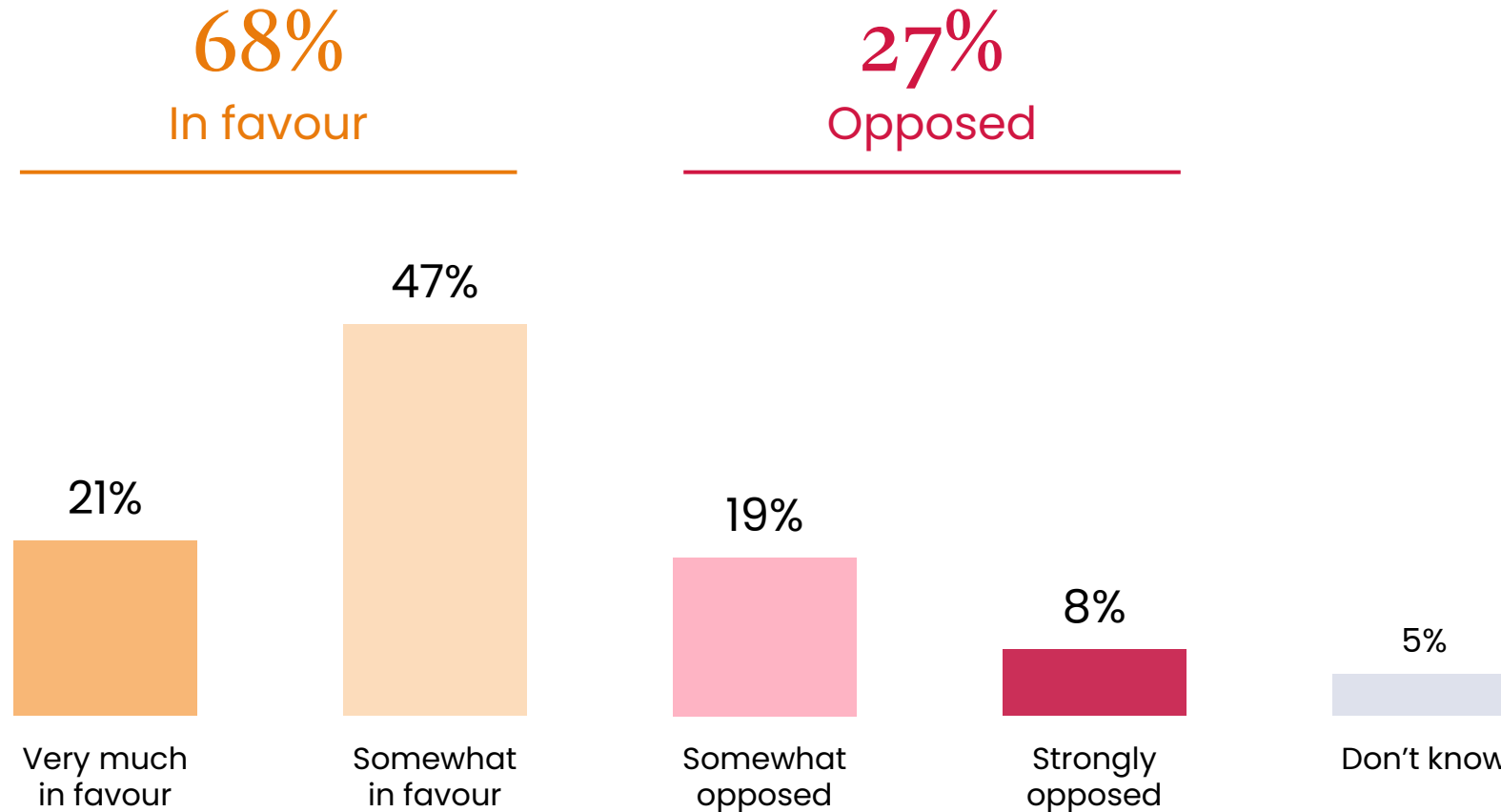
Support for restricting access to city centres for certain vehicles



Italy
1000
motorists

Q. In several major cities (Milan, Rome, etc.), restricted traffic zones (ZTL) limit access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question





Support for restricting access to city centres for certain vehicles

Q. In several major cities (Milan, Rome, etc.), restricted traffic zones (ZTL) limit access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question



Italy
1000
motorists

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	68%	67%	68%	73%	68%	64%	68%	71%	68%	68%	66%	71%
...Very much in favour	21%	22%	20%	25%	21%	19%	21%	23%	22%	21%	22%	22%
...Somewhat in favour	47%	45%	48%	48%	47%	45%	47%	48%	46%	47%	44%	49%
Subtotal Opposed	27%	29%	26%	26%	23%	32%	27%	26%	26%	28%	30%	25%
...Somewhat opposed	19%	22%	17%	24%	21%	21%	18%	18%	18%	20%	21%	18%
...Strongly opposed	8%	7%	9%	2%	2%	11%	9%	8%	8%	8%	9%	7%



Support for restricting access to city centres for certain vehicles



Italy
1000
motorists

Q. In several major cities (Milan, Rome, etc.), restricted traffic zones (ZTL) limit access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question

	% Total	REGION					TYPE OF SETTLEMENT			DRIVING FREQUENCY	
		Nord-Ovest	Nord-Est	Centro	Sud	Isole	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	68%	69%	68%	68%	69%	66%	68%	67%	69%	67%	74%
...Very much in favour	21%	22%	16%	22%	23%	26%	16%	24%	24%	21%	24%
...Somewhat in favour	47%	47%	52%	46%	46%	40%	52%	43%	45%	46%	50%
Subtotal Opposed	27%	29%	27%	25%	28%	25%	28%	27%	26%	28%	23%
...Somewhat opposed	19%	18%	24%	15%	19%	23%	21%	19%	18%	20%	16%
...Strongly opposed	8%	11%	3%	10%	9%	2%	7%	8%	8%	8%	7%



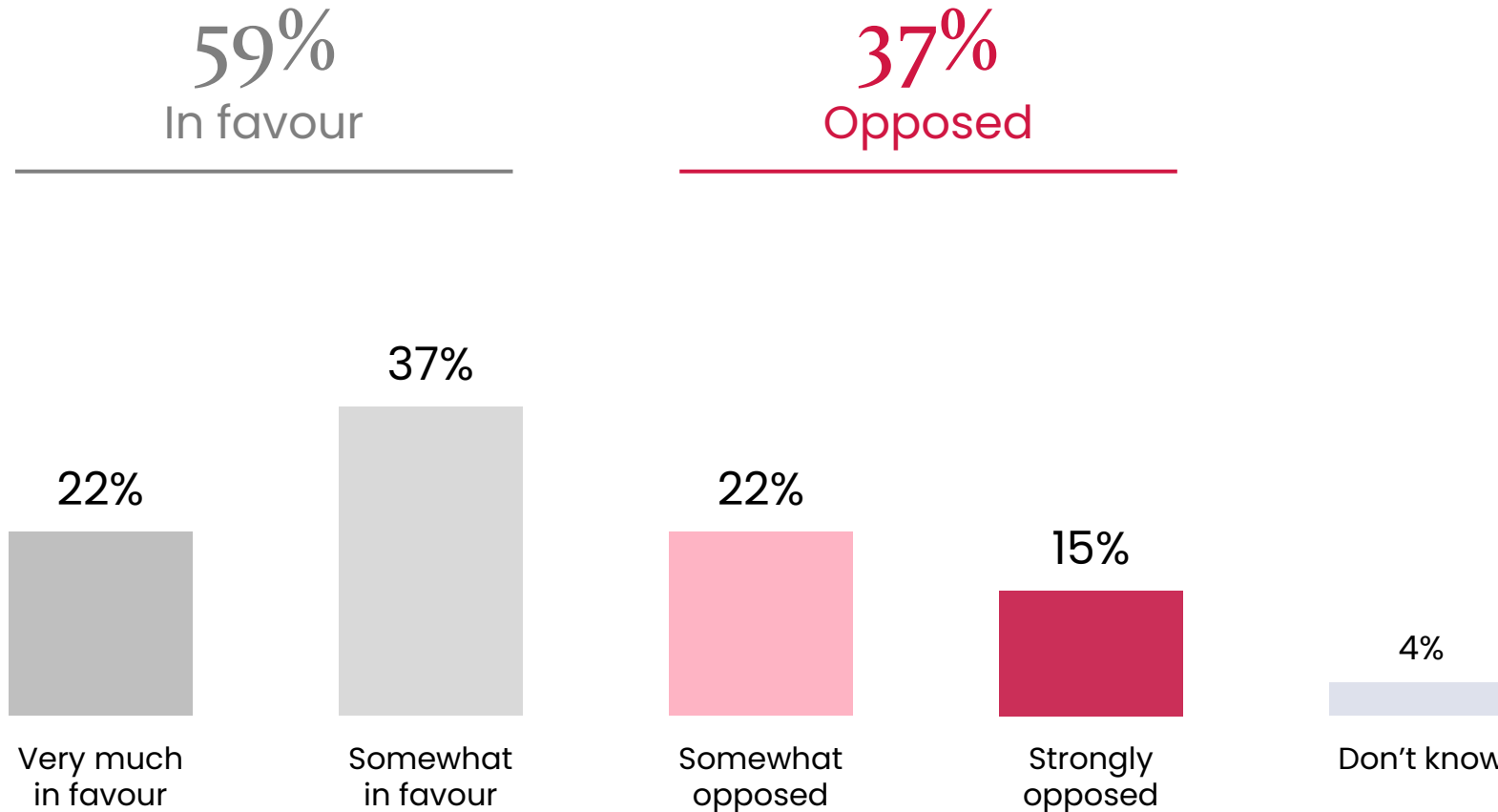
Support for restricting access to city centres for certain vehicles



Spain
1000
motorists

Q. In several major cities (Madrid, Barcelona, etc.), low-emission zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question





Support for restricting access to city centres for certain vehicles



Spain
1000
motorists

Q. In several major cities (Madrid, Barcelona, etc.), low-emission zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question

	% Total	GENDER		AGE					STATUS		NET MONTHLY INCOME OF HOUSEHOLD	
		Male	Female	18–24 years	25–34 years	35–49 years	50–64 years	65 and over	Working	Not in work	Low	High
Subtotal In favour	59%	58%	61%	55%	68%	62%	55%	56%	60%	56%	55%	63%
...Very much in favour	22%	23%	21%	21%	28%	22%	21%	19%	23%	19%	20%	24%
...Somewhat in favour	37%	35%	40%	34%	40%	40%	34%	37%	37%	37%	35%	39%
Subtotal Opposed	37%	39%	34%	39%	29%	34%	40%	41%	37%	38%	39%	34%
...Somewhat opposed	22%	23%	20%	30%	20%	19%	21%	23%	21%	24%	24%	19%
...Strongly opposed	15%	16%	14%	9%	9%	15%	19%	18%	16%	14%	15%	15%



Support for restricting access to city centres for certain vehicles



Spain
1000
motorists

Q. In several major cities (Madrid, Barcelona, etc.), low-emission zones (LEZs) restrict access to city centres for certain vehicles. Are you in favour of or opposed to this measure?

New question

	% Total	REGION							TYPE OF SETTLEMENT			FREQUENCY OF DRIVING	
		Noroeste	Noreste	Comunidad de Madrid	Centro	Este	Sur	Canarias*	Rural	Suburban	Urban	Every day or almost	At least once a week
Subtotal In favour	59%	51%	57%	61%	58%	62%	62%	50%	52%	57%	61%	60%	59%
...Very much in favour	22%	21%	21%	23%	19%	22%	25%	17%	17%	17%	24%	24%	19%
...Somewhat in favour	37%	30%	36%	38%	39%	40%	37%	33%	35%	40%	37%	36%	40%
Subtotal Opposed	37%	46%	39%	35%	34%	35%	36%	45%	46%	40%	34%	36%	37%
...Somewhat opposed	22%	26%	24%	19%	17%	21%	23%	29%	24%	20%	21%	22%	20%
...Strongly opposed	15%	20%	15%	16%	17%	14%	13%	16%	22%	20%	13%	14%	17%

opinionway

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Founded in 2000 on the basis of an idea that was radically innovative for its time, OpinionWay has been a pioneer in transforming practices within the market and opinion research sector.

Having enjoyed continuous growth since its inception, the company has constantly sought to broaden its horizons to better address all marketing and societal challenges, integrating social media intelligence, the use of smart data, creative co-creation dynamics, community-based approaches and storytelling into its methodologies. Today, OpinionWay is continuing its growth momentum by establishing a geographical presence in high-potential regions such as Eastern Europe and Africa.

It is this mission that drives OpinionWay's staff and forms the basis of the relationships they build with their clients.

The satisfaction they derive from providing answers to the questions they ask, reducing uncertainty about the decisions to be made, tracking relevant insights and co-creating solutions for the future, fuels every project they work on. This enthusiasm, combined with a genuine passion for innovation and knowledge-sharing, explains why our clients express high satisfaction after every collaboration – 8.9/10 – and a strong recommendation rate – 3.88/4. Enjoyment, commitment and intellectual stimulation are the three guiding principles of our work.

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