



# Perception of the crisis of the automotive sector in Europe

December 2024



# RESEARCH METHODOLOGY



# Research Methodology



This survey has been conducted online through CAWI method (Computer Assisted Web Interview) on a sample representative of the European Union 18+ population.



The total sample size is 5.112 complete interviews, distributed proportionally to the population of the 27 EU countries with a slight correction which allows to analyze the data on the pan-European level and 5 different areas: Germany, France, Eastern Europe, Northern Europe, Southern Europe. For each country proportional quotas were set for age and gender. Quotas were calculated regarding the most recent parameters provided by Eurostat.



Interviews were collected between the 28<sup>th</sup> of November and the 7<sup>th</sup> of December 2024, in the local language.



The report shows breakdowns by European political groups parties' voters and the following geographical areas:



1) Germany

2) France



3) Central and Eastern Europe (Baltic states, Poland, Czech R., Slovakia, Hungary, Romania, Bulgaria, Croatia, Slovenia)



4) Northern Europe (Sweden, Denmark, Finland, Belgium, Netherlands, Lux., Ireland, Austria)



5) Southern Europe (Spain, Italy, Portugal, Greece, Malta, Cyprus)



+ separate data for Italy and Spain

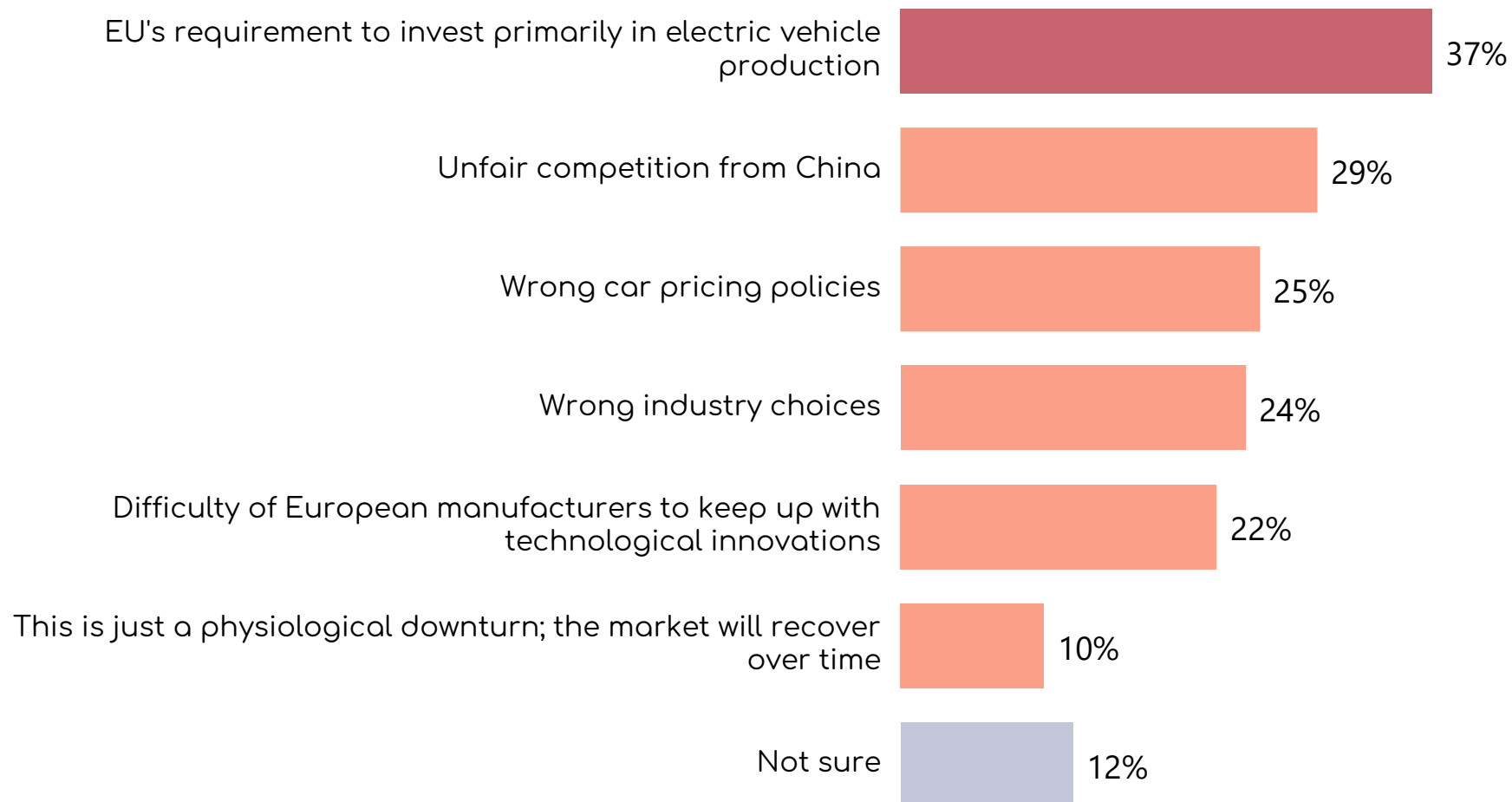
For European political groups parties' voters, in each country, people were interviewed on EU election vote on a national party basis and the results were recoded European political groups



# The reasons of the crisis in the automotive sector



All respondents: 5.112



Q. The automotive sector in Europe has recently shown some signs of crisis, accompanied by major staff layoffs and potential closure of some factories. In your personal opinion, what are the main reasons of this crisis? *Up to 2 possible answers, total exceeding 100%*



# The reasons of the crisis in the automotive sector



All respondents: 5.112

|                                                                                | Base  | TOTAL |  Germany |  France |  Southern Europe* |  Italy |  Spain |  CEE |  Northern Europe |
|--------------------------------------------------------------------------------|-------|-------|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
|                                                                                | 5.112 |       | 973                                                                                         | 748                                                                                        | 1.511                                                                                                | 694                                                                                       | 557                                                                                       | 1.134                                                                                   | 746                                                                                                 |
| EU's requirement to invest primarily in electric vehicle production            |       | 37%   | 29%                                                                                         | 41%                                                                                        | 37%                                                                                                  | 38%                                                                                       | 36%                                                                                       | 41%                                                                                     | 36%                                                                                                 |
| Unfair competition from China                                                  |       | 29%   | 21%                                                                                         | 37%                                                                                        | 24%                                                                                                  | 19%                                                                                       | 29%                                                                                       | 32%                                                                                     | 34%                                                                                                 |
| Wrong car pricing policies                                                     |       | 25%   | 28%                                                                                         | 29%                                                                                        | 27%                                                                                                  | 29%                                                                                       | 24%                                                                                       | 23%                                                                                     | 18%                                                                                                 |
| Wrong industry choices                                                         |       | 24%   | 35%                                                                                         | 22%                                                                                        | 23%                                                                                                  | 26%                                                                                       | 20%                                                                                       | 20%                                                                                     | 19%                                                                                                 |
| Difficulty of European manufacturers to keep up with technological innovations |       | 22%   | 26%                                                                                         | 18%                                                                                        | 25%                                                                                                  | 23%                                                                                       | 28%                                                                                       | 18%                                                                                     | 22%                                                                                                 |
| This is just a physiological downturn; the market will recover over time       |       | 10%   | 10%                                                                                         | 6%                                                                                         | 11%                                                                                                  | 8%                                                                                        | 11%                                                                                       | 12%                                                                                     | 11%                                                                                                 |
| Not sure                                                                       |       | 12%   | 10%                                                                                         | 14%                                                                                        | 11%                                                                                                  | 13%                                                                                       | 11%                                                                                       | 11%                                                                                     | 15%                                                                                                 |

\*Including Italy and Spain

Q. The automotive sector in Europe has recently shown some signs of crisis, accompanied by major staff layoffs and potential closure of some factories. In your personal opinion, what are the main reasons of this crisis? *Up to 2 possible answers, total exceeding 100%*



# The reasons of the crisis in the automotive sector



All respondents: 5.112

|                                                                                |      |            |  |  |  |  |  |  |  |  |
|--------------------------------------------------------------------------------|------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                                                                | Base | TOTAL      | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
| EU's requirement to invest primarily in electric vehicle production            |      | 5.112      | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
|                                                                                |      | <b>37%</b> | <b>43%</b>                                                                          | <b>28%</b>                                                                          | <b>25%</b>                                                                          | <b>36%</b>                                                                          | <b>36%</b>                                                                          | <b>47%</b>                                                                          | <b>41%</b>                                                                          | <b>45%</b>                                                                          |
| Unfair competition from China                                                  |      | <b>29%</b> | <b>23%</b>                                                                          | <b>30%</b>                                                                          | <b>30%</b>                                                                          | <b>37%</b>                                                                          | <b>36%</b>                                                                          | <b>32%</b>                                                                          | <b>30%</b>                                                                          | <b>18%</b>                                                                          |
| Wrong car pricing policies                                                     |      | <b>25%</b> | <b>32%</b>                                                                          | <b>27%</b>                                                                          | <b>25%</b>                                                                          | <b>24%</b>                                                                          | <b>26%</b>                                                                          | <b>25%</b>                                                                          | <b>26%</b>                                                                          | <b>28%</b>                                                                          |
| Wrong industry choices                                                         |      | <b>24%</b> | <b>22%</b>                                                                          | <b>26%</b>                                                                          | <b>29%</b>                                                                          | <b>24%</b>                                                                          | <b>24%</b>                                                                          | <b>19%</b>                                                                          | <b>22%</b>                                                                          | <b>33%</b>                                                                          |
| Difficulty of European manufacturers to keep up with technological innovations |      | <b>22%</b> | <b>24%</b>                                                                          | <b>27%</b>                                                                          | <b>31%</b>                                                                          | <b>25%</b>                                                                          | <b>22%</b>                                                                          | <b>20%</b>                                                                          | <b>19%</b>                                                                          | <b>17%</b>                                                                          |
| This is just a physiological downturn; the market will recover over time       |      | <b>10%</b> | <b>10%</b>                                                                          | <b>11%</b>                                                                          | <b>12%</b>                                                                          | <b>12%</b>                                                                          | <b>9%</b>                                                                           | <b>14%</b>                                                                          | <b>10%</b>                                                                          | <b>13%</b>                                                                          |
| Not sure                                                                       |      | <b>12%</b> | <b>7%</b>                                                                           | <b>11%</b>                                                                          | <b>9%</b>                                                                           | <b>6%</b>                                                                           | <b>8%</b>                                                                           | <b>5%</b>                                                                           | <b>13%</b>                                                                          | <b>5%</b>                                                                           |

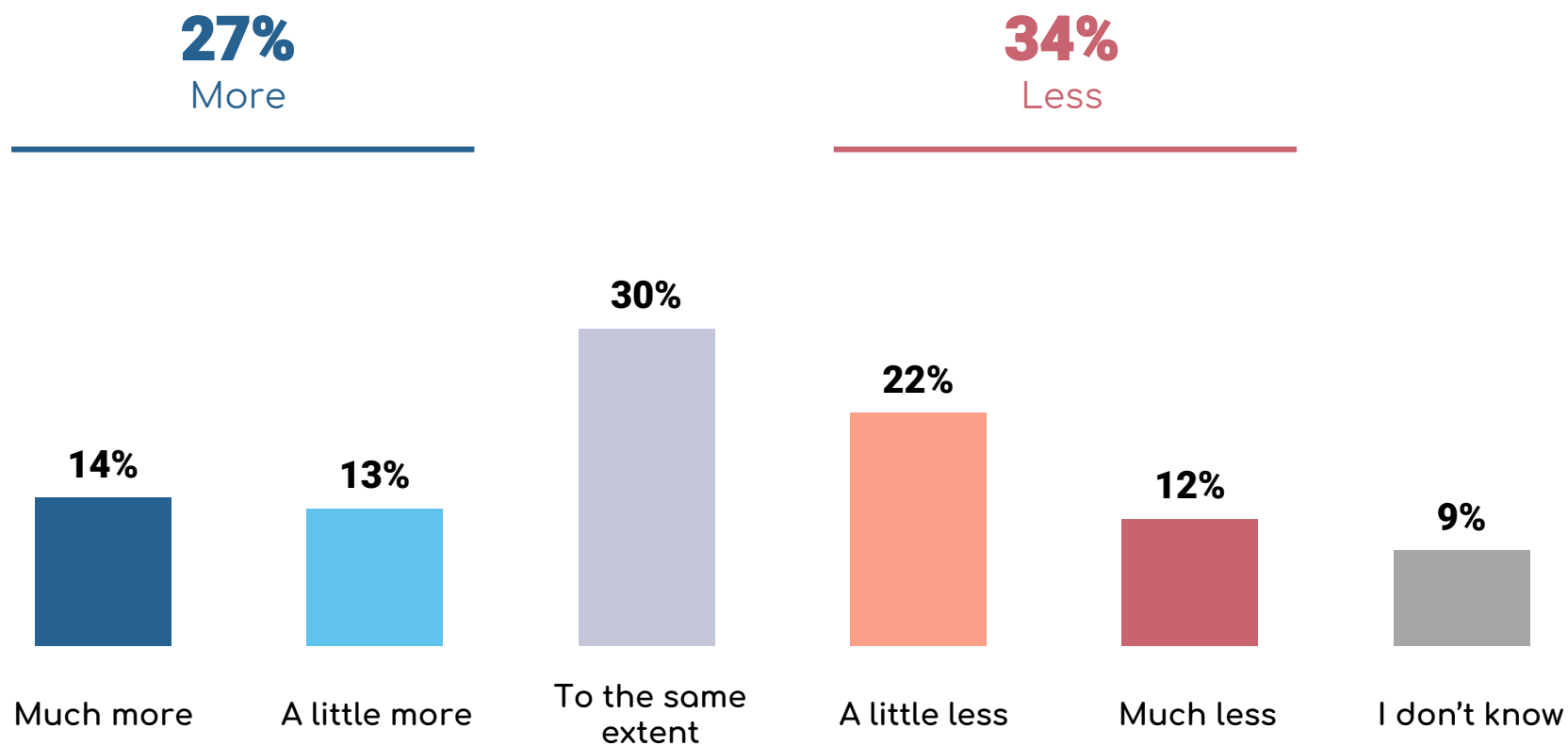
Q. The automotive sector in Europe has recently shown some signs of crisis, accompanied by major staff layoffs and potential closure of some factories. In your personal opinion, what are the main reasons of this crisis? *Up to 2 possible answers, total exceeding 100%*



# Perception of pollution produced by electric cars



All respondents: 5.112



Q. As far as you know, do electric cars today pollute more or less than gasoline-powered vehicles, considering also the sources of electricity production, battery production, etc.? Electric cars pollute...



# Perception of pollution produced by electric cars



All respondents: 5.112

|                    |            |  |  |  |  |  |  |  |
|--------------------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                    | Base       | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |
|                    | 5.112      | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |
| Total «more»       | <b>27%</b> | <b>28%</b>                                                                          | <b>28%</b>                                                                          | <b>23%</b>                                                                          | <b>23%</b>                                                                          | <b>25%</b>                                                                          | <b>27%</b>                                                                          | <b>29%</b>                                                                          |
| Much more          | 14%        | 15%                                                                                 | 15%                                                                                 | 11%                                                                                 | 11%                                                                                 | 12%                                                                                 | 14%                                                                                 | 14%                                                                                 |
| A little more      | 13%        | 13%                                                                                 | 13%                                                                                 | 12%                                                                                 | 12%                                                                                 | 13%                                                                                 | 13%                                                                                 | 15%                                                                                 |
| To the same extent | <b>30%</b> | <b>34%</b>                                                                          | <b>40%</b>                                                                          | <b>28%</b>                                                                          | <b>29%</b>                                                                          | <b>26%</b>                                                                          | <b>26%</b>                                                                          | <b>29%</b>                                                                          |
| Total «less»       | <b>34%</b> | <b>30%</b>                                                                          | <b>20%</b>                                                                          | <b>41%</b>                                                                          | <b>38%</b>                                                                          | <b>42%</b>                                                                          | <b>38%</b>                                                                          | <b>32%</b>                                                                          |
| A little less      | 22%        | 21%                                                                                 | 15%                                                                                 | 26%                                                                                 | 26%                                                                                 | 25%                                                                                 | 23%                                                                                 | 22%                                                                                 |
| Much less          | 12%        | 9%                                                                                  | 5%                                                                                  | 15%                                                                                 | 12%                                                                                 | 17%                                                                                 | 15%                                                                                 | 10%                                                                                 |
| I don't know       | <b>9%</b>  | <b>8%</b>                                                                           | <b>12%</b>                                                                          | <b>8%</b>                                                                           | <b>10%</b>                                                                          | <b>7%</b>                                                                           | <b>9%</b>                                                                           | <b>10%</b>                                                                          |

\*Including Italy and Spain

Q. As far as you know, do electric cars today pollute more or less than gasoline-powered vehicles, considering also the sources of electricity production, battery production, etc.? Electric cars pollute...



# Perception of pollution produced by electric cars



All respondents: 5.112

|                    |      |            |  |  |  |  |  |  |  |  |
|--------------------|------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                    | Base | TOTAL      | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
|                    |      | 5.112      | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
| Total «more»       |      | <b>27%</b> | <b>27%</b>                                                                          | <b>18%</b>                                                                          | <b>16%</b>                                                                          | <b>25%</b>                                                                          | <b>28%</b>                                                                          | <b>31%</b>                                                                          | <b>34%</b>                                                                          | <b>44%</b>                                                                          |
| Much more          |      | 14%        | 13%                                                                                 | 6%                                                                                  | 6%                                                                                  | 11%                                                                                 | 13%                                                                                 | 17%                                                                                 | 20%                                                                                 | 28%                                                                                 |
| A little more      |      | 13%        | 14%                                                                                 | 12%                                                                                 | 10%                                                                                 | 14%                                                                                 | 15%                                                                                 | 14%                                                                                 | 14%                                                                                 | 16%                                                                                 |
| To the same extent |      | <b>30%</b> | <b>34%</b>                                                                          | <b>29%</b>                                                                          | <b>28%</b>                                                                          | <b>31%</b>                                                                          | <b>30%</b>                                                                          | <b>30%</b>                                                                          | <b>35%</b>                                                                          | <b>33%</b>                                                                          |
| Total «less»       |      | <b>34%</b> | <b>33%</b>                                                                          | <b>44%</b>                                                                          | <b>51%</b>                                                                          | <b>38%</b>                                                                          | <b>36%</b>                                                                          | <b>31%</b>                                                                          | <b>23%</b>                                                                          | <b>18%</b>                                                                          |
| A little less      |      | 22%        | 21%                                                                                 | 29%                                                                                 | 33%                                                                                 | 25%                                                                                 | 23%                                                                                 | 21%                                                                                 | 15%                                                                                 | 11%                                                                                 |
| Much less          |      | 12%        | 12%                                                                                 | 15%                                                                                 | 18%                                                                                 | 13%                                                                                 | 13%                                                                                 | 10%                                                                                 | 8%                                                                                  | 7%                                                                                  |
| I don't know       |      | <b>9%</b>  | <b>6%</b>                                                                           | <b>9%</b>                                                                           | <b>5%</b>                                                                           | <b>6%</b>                                                                           | <b>6%</b>                                                                           | <b>8%</b>                                                                           | <b>8%</b>                                                                           | <b>5%</b>                                                                           |

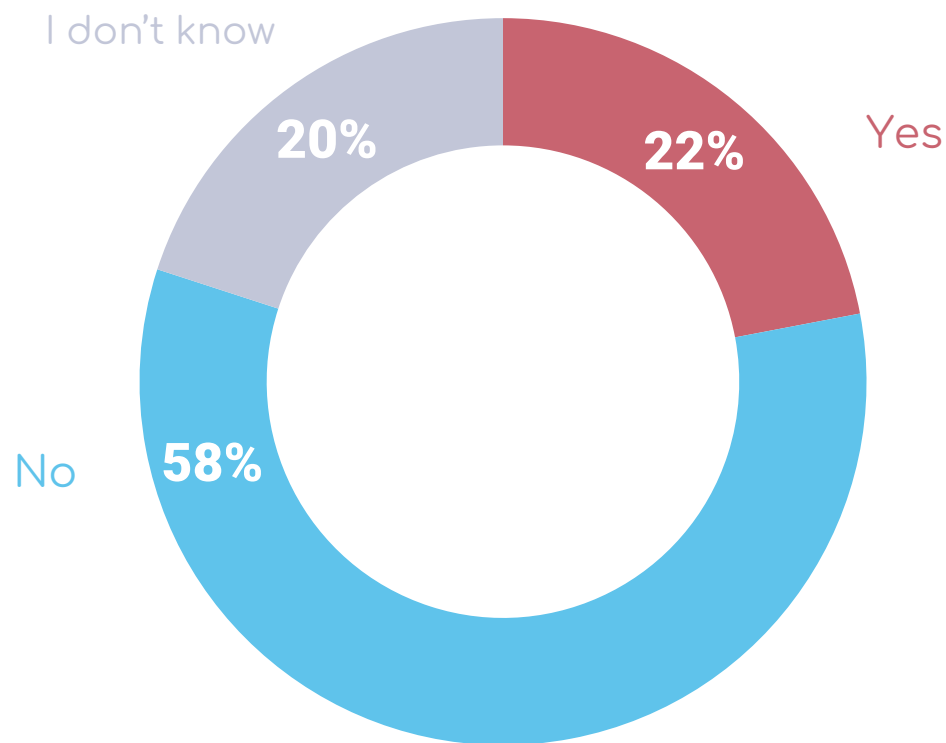
Q. As far as you know, do electric cars today pollute more or less than gasoline-powered vehicles, considering also the sources of electricity production, battery production, etc.? Electric cars pollute...



# Is it credible to power electric cars with renewable sources by 2035?



All respondents: 5.112



Q. Do you think it is credible that by 2035 we will reach the point in Europe where all the electricity needed to power electric cars will be generated from renewable sources?



# Is it credible to power electric cars with renewable sources by 2035?



All respondents: 5.112

|                                   |              |  |  |  |  |  |  |  |                                                                                     |
|-----------------------------------|--------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                   | <b>TOTAL</b> | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |                                                                                     |
| Base                              | 5.112        | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |                                                                                     |
| Yes                               | <b>22%</b>   | <b>20%</b>                                                                          | <b>15%</b>                                                                          | <b>22%</b>                                                                          | <b>14%</b>                                                                          | <b>24%</b>                                                                          | <b>24%</b>                                                                          | <b>25%</b>                                                                          |                                                                                     |
| No                                | <b>58%</b>   | <b>63%</b>                                                                          | <b>66%</b>                                                                          | <b>56%</b>                                                                          | <b>63%</b>                                                                          | <b>54%</b>                                                                          | <b>53%</b>                                                                          | <b>56%</b>                                                                          |                                                                                     |
| I don't know                      | <b>20%</b>   | <b>17%</b>                                                                          | <b>19%</b>                                                                          | <b>22%</b>                                                                          | <b>23%</b>                                                                          | <b>22%</b>                                                                          | <b>23%</b>                                                                          | <b>19%</b>                                                                          |                                                                                     |
| <i>*Including Italy and Spain</i> |              |                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                     |
|                                   |              |  |  |  |  |  |  |  |  |
|                                   | <b>TOTAL</b> | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
| Base                              | 5.112        | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
| Yes                               | <b>22%</b>   | <b>26%</b>                                                                          | <b>27%</b>                                                                          | <b>24%</b>                                                                          | <b>26%</b>                                                                          | <b>24%</b>                                                                          | <b>18%</b>                                                                          | <b>22%</b>                                                                          | <b>19%</b>                                                                          |
| No                                | <b>58%</b>   | <b>58%</b>                                                                          | <b>51%</b>                                                                          | <b>53%</b>                                                                          | <b>55%</b>                                                                          | <b>59%</b>                                                                          | <b>62%</b>                                                                          | <b>60%</b>                                                                          | <b>71%</b>                                                                          |
| I don't know                      | <b>20%</b>   | <b>16%</b>                                                                          | <b>22%</b>                                                                          | <b>23%</b>                                                                          | <b>19%</b>                                                                          | <b>17%</b>                                                                          | <b>20%</b>                                                                          | <b>18%</b>                                                                          | <b>10%</b>                                                                          |

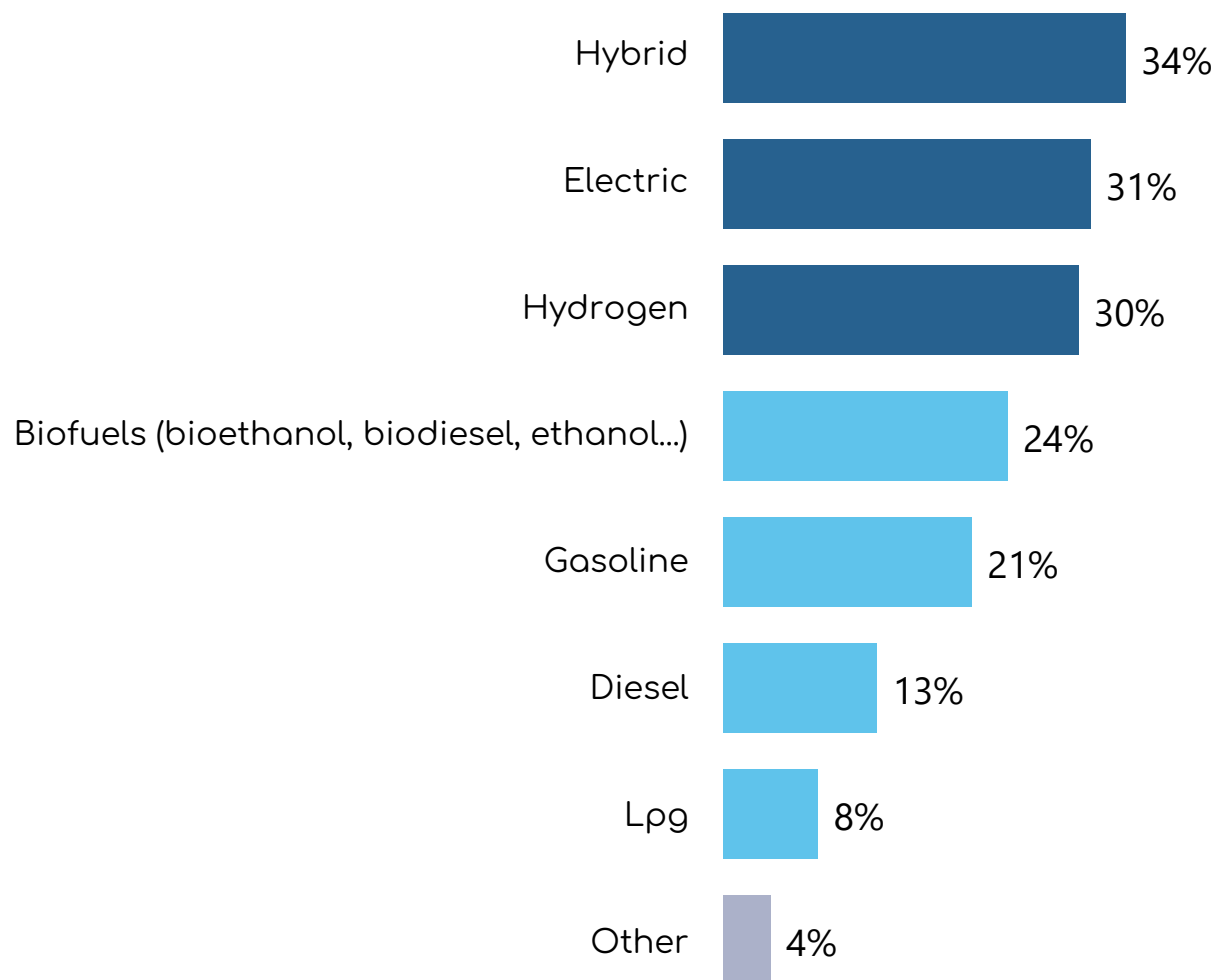
Q. Do you think it is credible that by 2035 we will reach the point in Europe where all the electricity needed to power electric cars will be generated from renewable sources?



# Alternative power supplies for automobiles



All respondents: 5.112



Q. In general, do you think that as a power supply for automobiles, in the coming years we should focus mainly on:

*Up to 2 possible answers, total exceeding 100%*



# Alternative power supplies for automobiles



All respondents: 5.112

|                                              |       |  |  |  |  |  |  |  |
|----------------------------------------------|-------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                              | Base  | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |
|                                              | 5.112 | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |
| Hybrid                                       | 34%   | 24%                                                                                 | 36%                                                                                 | 36%                                                                                 | 34%                                                                                 | 39%                                                                                 | 38%                                                                                 | 33%                                                                                 |
| Electric                                     | 31%   | 32%                                                                                 | 23%                                                                                 | 31%                                                                                 | 23%                                                                                 | 35%                                                                                 | 31%                                                                                 | 36%                                                                                 |
| Hydrogen                                     | 30%   | 35%                                                                                 | 29%                                                                                 | 29%                                                                                 | 34%                                                                                 | 21%                                                                                 | 27%                                                                                 | 29%                                                                                 |
| Biofuels (bioethanol, biodiesel, ethanol...) | 24%   | 20%                                                                                 | 35%                                                                                 | 25%                                                                                 | 25%                                                                                 | 26%                                                                                 | 22%                                                                                 | 20%                                                                                 |
| Gasoline                                     | 21%   | 28%                                                                                 | 17%                                                                                 | 15%                                                                                 | 9%                                                                                  | 23%                                                                                 | 24%                                                                                 | 24%                                                                                 |
| Diesel                                       | 13%   | 14%                                                                                 | 15%                                                                                 | 11%                                                                                 | 10%                                                                                 | 13%                                                                                 | 13%                                                                                 | 15%                                                                                 |
| Lpg                                          | 8%    | 6%                                                                                  | 8%                                                                                  | 10%                                                                                 | 16%                                                                                 | 2%                                                                                  | 9%                                                                                  | 5%                                                                                  |
| Other                                        | 4%    | 6%                                                                                  | 6%                                                                                  | 3%                                                                                  | 3%                                                                                  | 3%                                                                                  | 4%                                                                                  | 4%                                                                                  |

Q. In general, do you think that as a power supply for automobiles, in the coming years we should focus mainly on:

*Up to 2 possible answers, total exceeding 100%*

*\*Including Italy and Spain*



# Alternative power supplies for automobiles



All respondents: 5.112

|  |                                              |       |  |  |  |  |  |  |  |  |
|--|----------------------------------------------|-------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  | Base                                         | TOTAL | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
|  |                                              | 5.112 | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
|  | Hybrid                                       | 34%   | 31%                                                                                 | 41%                                                                                 | 33%                                                                                 | 37%                                                                                 | 35%                                                                                 | 35%                                                                                 | 35%                                                                                 | 25%                                                                                 |
|  | Electric                                     | 31%   | 30%                                                                                 | 38%                                                                                 | 46%                                                                                 | 36%                                                                                 | 35%                                                                                 | 25%                                                                                 | 23%                                                                                 | 18%                                                                                 |
|  | Hydrogen                                     | 30%   | 35%                                                                                 | 28%                                                                                 | 33%                                                                                 | 34%                                                                                 | 34%                                                                                 | 34%                                                                                 | 27%                                                                                 | 24%                                                                                 |
|  | Biofuels (bioethanol, biodiesel, ethanol...) | 24%   | 25%                                                                                 | 23%                                                                                 | 22%                                                                                 | 26%                                                                                 | 23%                                                                                 | 20%                                                                                 | 27%                                                                                 | 18%                                                                                 |
|  | Gasoline                                     | 21%   | 17%                                                                                 | 16%                                                                                 | 11%                                                                                 | 18%                                                                                 | 20%                                                                                 | 23%                                                                                 | 28%                                                                                 | 42%                                                                                 |
|  | Diesel                                       | 13%   | 15%                                                                                 | 8%                                                                                  | 6%                                                                                  | 9%                                                                                  | 10%                                                                                 | 17%                                                                                 | 18%                                                                                 | 29%                                                                                 |
|  | Lpg                                          | 8%    | 8%                                                                                  | 7%                                                                                  | 7%                                                                                  | 6%                                                                                  | 7%                                                                                  | 12%                                                                                 | 9%                                                                                  | 9%                                                                                  |
|  | Other                                        | 4%    | 2%                                                                                  | 2%                                                                                  | 5%                                                                                  | 4%                                                                                  | 3%                                                                                  | 1%                                                                                  | 2%                                                                                  | 3%                                                                                  |

Q. In general, do you think that as a power supply for automobiles, in the coming years we should focus mainly on:

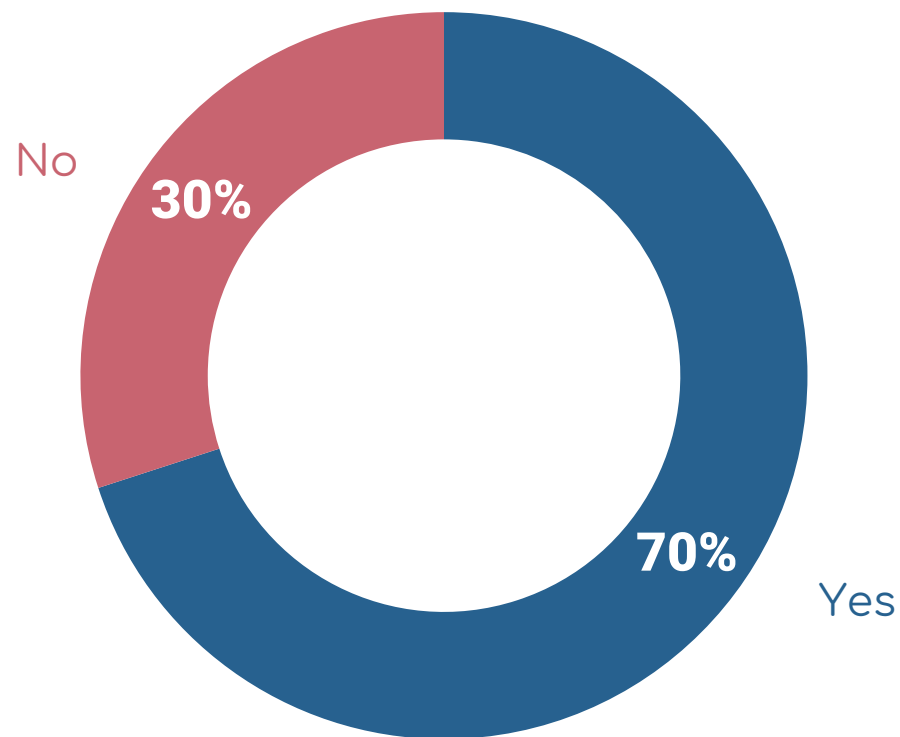
*Up to 2 possible answers, total exceeding 100%*



# Knowledge of diesel and gasoline car ban



All respondents: 5.112



Q. Are you aware that the European Union has banned the sale of new diesel and gasoline cars, thus allowing only the sale of electric cars?



# Knowledge of diesel and gasoline car ban



All respondents: 5.112

|      |              |  |  |  |  |  |  |  |
|------|--------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|      | <b>TOTAL</b> | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |
| Base | 5.112        | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |
| Yes  | <b>70%</b>   | <b>73%</b>                                                                          | <b>70%</b>                                                                          | <b>75%</b>                                                                          | <b>78%</b>                                                                          | <b>77%</b>                                                                          | <b>66%</b>                                                                          | <b>66%</b>                                                                          |
| No   | <b>30%</b>   | <b>27%</b>                                                                          | <b>30%</b>                                                                          | <b>25%</b>                                                                          | <b>22%</b>                                                                          | <b>23%</b>                                                                          | <b>34%</b>                                                                          | <b>34%</b>                                                                          |

\*Including Italy and Spain

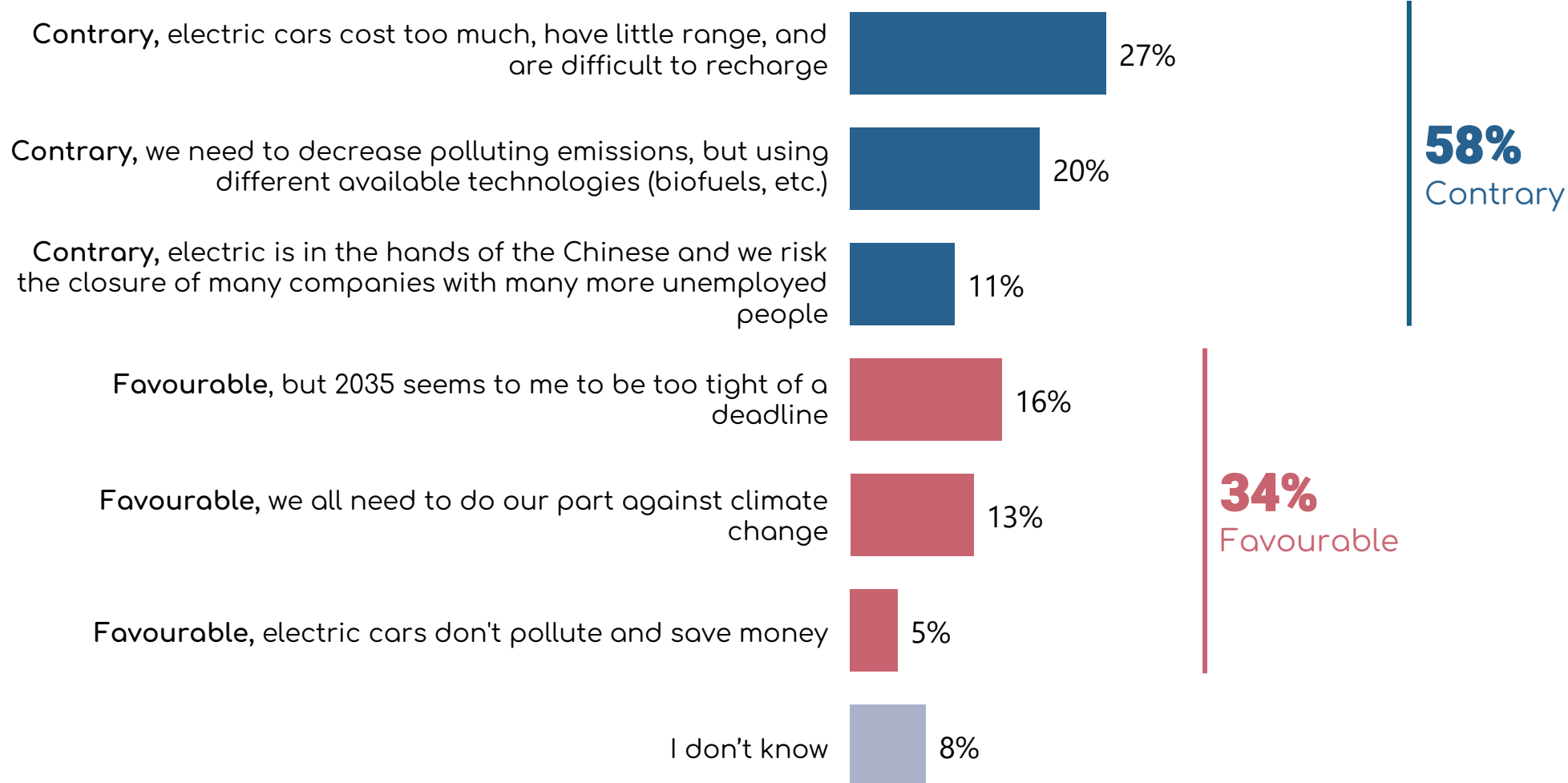
|      |              |  |  |  |  |  |  |  |  |
|------|--------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|      | <b>TOTAL</b> | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
| Base | 5.112        | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
| Yes  | <b>70%</b>   | <b>72%</b>                                                                          | <b>75%</b>                                                                          | <b>70%</b>                                                                          | <b>74%</b>                                                                          | <b>75%</b>                                                                          | <b>74%</b>                                                                          | <b>71%</b>                                                                          | <b>78%</b>                                                                          |
| No   | <b>30%</b>   | <b>28%</b>                                                                          | <b>25%</b>                                                                          | <b>30%</b>                                                                          | <b>26%</b>                                                                          | <b>25%</b>                                                                          | <b>26%</b>                                                                          | <b>29%</b>                                                                          | <b>22%</b>                                                                          |



# Opinions in regard to the diesel and gasoline car ban



All respondents: 5.112





# Opinions in regard to the diesel and gasoline car ban



All respondents: 5.112

|                                                                                                                              |            |  |  |  |  |  |  |  |
|------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                                                                                                              | Base       | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |
|                                                                                                                              | 5.112      | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |
| <b>SUM «CONTRARY»</b>                                                                                                        | <b>58%</b> | <b>59%</b>                                                                          | <b>67%</b>                                                                          | <b>56%</b>                                                                          | <b>59%</b>                                                                          | <b>57%</b>                                                                          | <b>54%</b>                                                                          | <b>51%</b>                                                                          |
| Contrary, electric cars cost too much, have little range, and are difficult to recharge                                      | 27%        | 26%                                                                                 | 30%                                                                                 | 26%                                                                                 | 25%                                                                                 | 27%                                                                                 | 28%                                                                                 | 25%                                                                                 |
| Contrary, we need to decrease polluting emissions, but using different available technologies (biofuels, etc.)               | 20%        | 16%                                                                                 | 25%                                                                                 | 21%                                                                                 | 25%                                                                                 | 21%                                                                                 | 17%                                                                                 | 15%                                                                                 |
| Contrary, electric is in the hands of the Chinese and we risk the closure of many companies with many more unemployed people | 11%        | 17%                                                                                 | 12%                                                                                 | 9%                                                                                  | 9%                                                                                  | 9%                                                                                  | 9%                                                                                  | 11%                                                                                 |
| <b>SUM «FAVOURABLE»</b>                                                                                                      | <b>34%</b> | <b>31%</b>                                                                          | <b>24%</b>                                                                          | <b>38%</b>                                                                          | <b>34%</b>                                                                          | <b>39%</b>                                                                          | <b>37%</b>                                                                          | <b>37%</b>                                                                          |
| Favourable, but 2035 seems to me to be too tight of a deadline                                                               | 16%        | 14%                                                                                 | 16%                                                                                 | 15%                                                                                 | 15%                                                                                 | 14%                                                                                 | 19%                                                                                 | 18%                                                                                 |
| Favourable, we all need to do our part against climate change                                                                | 13%        | 13%                                                                                 | 6%                                                                                  | 18%                                                                                 | 15%                                                                                 | 19%                                                                                 | 11%                                                                                 | 13%                                                                                 |
| Favourable, electric cars don't pollute and save money                                                                       | 5%         | 4%                                                                                  | 2%                                                                                  | 5%                                                                                  | 4%                                                                                  | 6%                                                                                  | 7%                                                                                  | 6%                                                                                  |
| <b>I don't know</b>                                                                                                          | <b>8%</b>  | <b>10%</b>                                                                          | <b>9%</b>                                                                           | <b>6%</b>                                                                           | <b>7%</b>                                                                           | <b>4%</b>                                                                           | <b>9%</b>                                                                           | <b>12%</b>                                                                          |

\*Including Italy and Spain



# Opinions in regard to the diesel and gasoline car ban



All respondents: 5.112

|                                                                                                                              | Base | TOTAL      |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |
|------------------------------------------------------------------------------------------------------------------------------|------|------------|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
|                                                                                                                              |      | 5.112      | 339                                                                                         | 775                                                                                     | 333                                                                                        | 379                                                                                    | 852                                                                                     | 318                                                                                     | 583                                                                                          | 239                                                                                     |
| <b>SUM «CONTRARY»</b>                                                                                                        |      | <b>58%</b> | <b>58%</b>                                                                                  | <b>47%</b>                                                                              | <b>44%</b>                                                                                 | <b>57%</b>                                                                             | <b>58%</b>                                                                              | <b>61%</b>                                                                              | <b>67%</b>                                                                                   | <b>77%</b>                                                                              |
| Contrary, electric cars cost too much, have little range, and are difficult to recharge                                      |      | 27%        | 28%                                                                                         | 23%                                                                                     | 17%                                                                                        | 25%                                                                                    | 26%                                                                                     | 25%                                                                                     | 33%                                                                                          | 40%                                                                                     |
| Contrary, we need to decrease polluting emissions, but using different available technologies (biofuels, etc.)               |      | 20%        | 21%                                                                                         | 16%                                                                                     | 14%                                                                                        | 18%                                                                                    | 20%                                                                                     | 21%                                                                                     | 20%                                                                                          | 18%                                                                                     |
| Contrary, electric is in the hands of the Chinese and we risk the closure of many companies with many more unemployed people |      | 11%        | 9%                                                                                          | 8%                                                                                      | 13%                                                                                        | 14%                                                                                    | 12%                                                                                     | 15%                                                                                     | 14%                                                                                          | 19%                                                                                     |
| <b>SUM «FAVOURABLE»</b>                                                                                                      |      | <b>34%</b> | <b>38%</b>                                                                                  | <b>45%</b>                                                                              | <b>52%</b>                                                                                 | <b>38%</b>                                                                             | <b>37%</b>                                                                              | <b>31%</b>                                                                              | <b>27%</b>                                                                                   | <b>18%</b>                                                                              |
| Favourable, but 2035 seems to me to be too tight of a deadline                                                               |      | 16%        | 18%                                                                                         | 19%                                                                                     | 18%                                                                                        | 19%                                                                                    | 19%                                                                                     | 18%                                                                                     | 14%                                                                                          | 10%                                                                                     |
| Favourable, we all need to do our part against climate change                                                                |      | 13%        | 15%                                                                                         | 19%                                                                                     | 26%                                                                                        | 15%                                                                                    | 14%                                                                                     | 7%                                                                                      | 8%                                                                                           | 5%                                                                                      |
| Favourable, electric cars don't pollute and save money                                                                       |      | 5%         | 5%                                                                                          | 7%                                                                                      | 8%                                                                                         | 4%                                                                                     | 4%                                                                                      | 6%                                                                                      | 5%                                                                                           | 3%                                                                                      |
| <b>I don't know</b>                                                                                                          |      | <b>8%</b>  | <b>4%</b>                                                                                   | <b>8%</b>                                                                               | <b>4%</b>                                                                                  | <b>5%</b>                                                                              | <b>5%</b>                                                                               | <b>8%</b>                                                                               | <b>6%</b>                                                                                    | <b>5%</b>                                                                               |

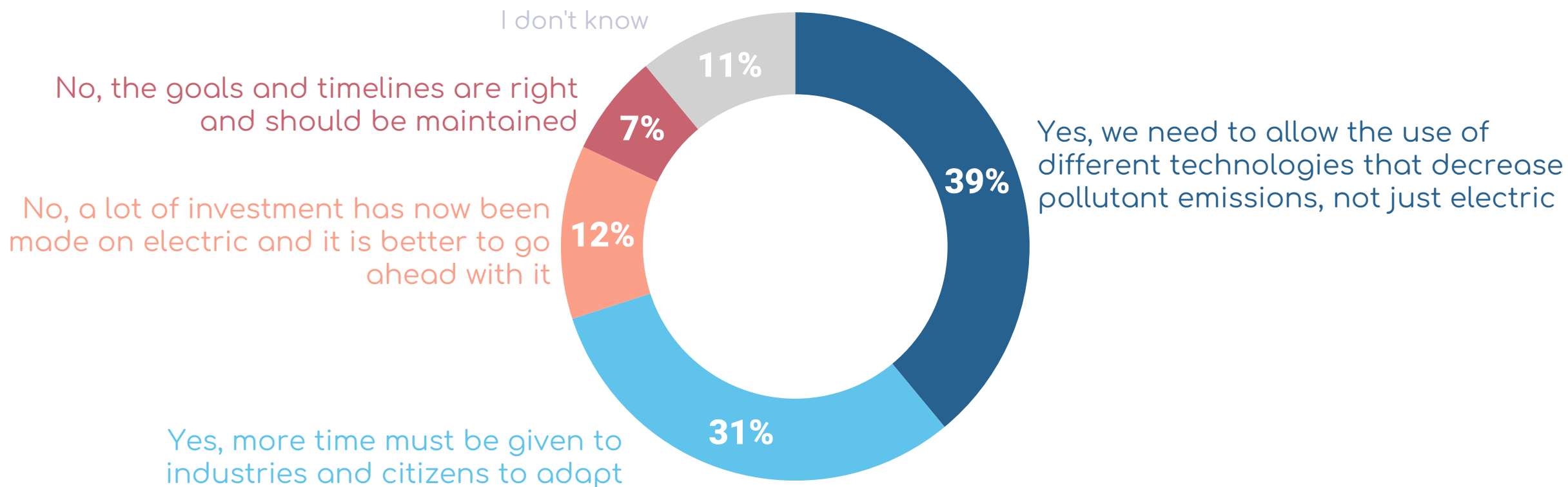
Q. And regarding the ban on the sale of new diesel and gasoline cars from 2035 are you:



# Favour in regard to a revision of the EU legislation on the ban on the sale of new diesel and gasoline cars



All respondents: 5.112





# Favour in regard to a revision of the EU legislation on the ban on the sale of new diesel and gasoline cars



All respondents: 5.112

|                                                                                                              |            |  |  |  |  |  |  |  |
|--------------------------------------------------------------------------------------------------------------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                                                                                              | Base       | Germany                                                                             | France                                                                              | Southern Europe*                                                                    | Italy                                                                               | Spain                                                                               | CEE                                                                                 | Northern Europe                                                                     |
|                                                                                                              | 5.112      | 973                                                                                 | 748                                                                                 | 1.511                                                                               | 694                                                                                 | 557                                                                                 | 1.134                                                                               | 746                                                                                 |
| SUM «YES»                                                                                                    | <b>70%</b> | <b>68%</b>                                                                          | <b>71%</b>                                                                          | <b>72%</b>                                                                          | <b>70%</b>                                                                          | <b>75%</b>                                                                          | <b>69%</b>                                                                          | <b>66%</b>                                                                          |
| Yes, we need to allow the use of different technologies that decrease pollutant emissions, not just electric | 39%        | 36%                                                                                 | 44%                                                                                 | 42%                                                                                 | 45%                                                                                 | 41%                                                                                 | 35%                                                                                 | 35%                                                                                 |
| Yes, more time must be given to industries and citizens to adapt                                             | 31%        | 32%                                                                                 | 27%                                                                                 | 30%                                                                                 | 25%                                                                                 | 34%                                                                                 | 34%                                                                                 | 31%                                                                                 |
| SUM «NO»                                                                                                     | <b>19%</b> | <b>22%</b>                                                                          | <b>16%</b>                                                                          | <b>19%</b>                                                                          | <b>20%</b>                                                                          | <b>16%</b>                                                                          | <b>20%</b>                                                                          | <b>20%</b>                                                                          |
| No, a lot of investment has now been made on electric and it is better to go ahead with it                   | 12%        | 14%                                                                                 | 9%                                                                                  | 11%                                                                                 | 13%                                                                                 | 9%                                                                                  | 13%                                                                                 | 12%                                                                                 |
| No, the goals and timelines are right and should be maintained                                               | 7%         | 8%                                                                                  | 7%                                                                                  | 8%                                                                                  | 7%                                                                                  | 7%                                                                                  | 7%                                                                                  | 8%                                                                                  |
| I don't know                                                                                                 | <b>11%</b> | <b>10%</b>                                                                          | <b>13%</b>                                                                          | <b>9%</b>                                                                           | <b>10%</b>                                                                          | <b>9%</b>                                                                           | <b>11%</b>                                                                          | <b>14%</b>                                                                          |

\*Including Italy and Spain



# Favour in regard to a revision of the EU legislation on the ban on the sale of new diesel and gasoline cars



All respondents: 5.112

|                                                                                                              |      |            |  |  |  |  |  |  |  |  |
|--------------------------------------------------------------------------------------------------------------|------|------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                                                                                                              | Base | TOTAL      | GUE/NGL                                                                             | S&D                                                                                 | Greens                                                                              | RE                                                                                  | EPP                                                                                 | ECR                                                                                 | Patriots                                                                            | ESN                                                                                 |
|                                                                                                              |      | 5.112      | 339                                                                                 | 775                                                                                 | 333                                                                                 | 379                                                                                 | 852                                                                                 | 318                                                                                 | 583                                                                                 | 239                                                                                 |
| SUM «YES»                                                                                                    |      | <b>70%</b> | <b>67%</b>                                                                          | <b>70%</b>                                                                          | <b>56%</b>                                                                          | <b>69%</b>                                                                          | <b>77%</b>                                                                          | <b>73%</b>                                                                          | <b>74%</b>                                                                          | <b>75%</b>                                                                          |
| Yes, we need to allow the use of different technologies that decrease pollutant emissions, not just electric |      | 39%        | 41%                                                                                 | 36%                                                                                 | 31%                                                                                 | 37%                                                                                 | 39%                                                                                 | 40%                                                                                 | 44%                                                                                 | 41%                                                                                 |
| Yes, more time must be given to industries and citizens to adapt                                             |      | 31%        | 26%                                                                                 | 34%                                                                                 | 25%                                                                                 | 32%                                                                                 | 38%                                                                                 | 33%                                                                                 | 30%                                                                                 | 34%                                                                                 |
| SUM «NO»                                                                                                     |      | <b>19%</b> | <b>25%</b>                                                                          | <b>20%</b>                                                                          | <b>36%</b>                                                                          | <b>23%</b>                                                                          | <b>16%</b>                                                                          | <b>18%</b>                                                                          | <b>15%</b>                                                                          | <b>17%</b>                                                                          |
| No, a lot of investment has now been made on electric and it is better to go ahead with it                   |      | 12%        | 16%                                                                                 | 11%                                                                                 | 20%                                                                                 | 14%                                                                                 | 11%                                                                                 | 10%                                                                                 | 8%                                                                                  | 11%                                                                                 |
| No, the goals and timelines are right and should be maintained                                               |      | 7%         | 9%                                                                                  | 9%                                                                                  | 16%                                                                                 | 9%                                                                                  | 5%                                                                                  | 8%                                                                                  | 7%                                                                                  | 6%                                                                                  |
| I don't know                                                                                                 |      | <b>11%</b> | <b>8%</b>                                                                           | <b>10%</b>                                                                          | <b>8%</b>                                                                           | <b>8%</b>                                                                           | <b>7%</b>                                                                           | <b>9%</b>                                                                           | <b>11%</b>                                                                          | <b>8%</b>                                                                           |



*Photo by christian-lue on Unplash*



Polling Europe is an innovative research firm born from the esteemed collaboration of SWG and OpinionWay, two premier market and social research entities from Italy and France.

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