

AUTO

2024

COUNTRY FACT SHEETS

AUSTRIA
BELGIUM
CHINA
FRANCE
GERMANY
ITALY
JAPAN
MEXICO
NETHERLANDS
NORWAY
POLAND
PORTUGAL
SPAIN
TURKEY
UNITED KINGDOM
UNITED STATES



Austria

AUSTRIA VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



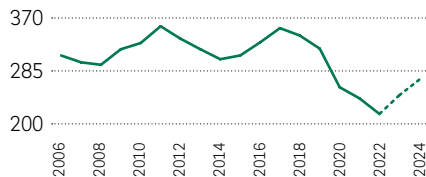
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **0.22** | 2023 **0.25** (+14%) | 2024 **0.27** (+10%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

¹ ACEA & OICA. ² IEA & Marklines. ³ IAE. ⁴ GlobalEconomy. ⁵ OICA, Marklines & C-Ways.

AUSTRIA VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



Government subsidies are essential

Share of respondents who view them as **"essential"**



The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

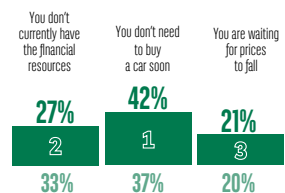
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The Austrians find themselves in a real fog when it comes to regulations. A majority do not know exactly what these entail. When it comes to assessing the different carmakers, they are very positive about the value for money that they perceive is offered by Asian brands, whether Chinese, Japanese or Korean.

Belgium

BELGIUM VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



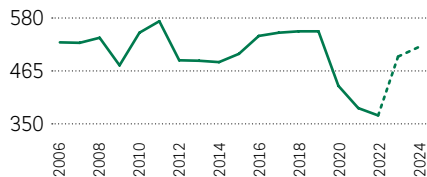
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **0.37** | 2023 **0.5** (+35%) | 2024 **0.52** (+4%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

BELGIUM VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



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The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

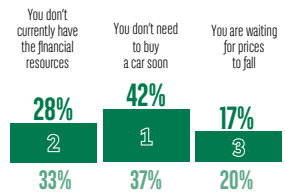
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Buying a car is not a decision that Belgians take lightly. In fact, this is the country where this attitude is the most prevalent. But the difficulty in making such a decision is not contingent on a possible fall in prices, something that they are the least likely to anticipate. Regarding every kind of regulation, the Belgians appear very clear sighted, with a large proportion claiming to see exactly what these measures entail.

China

CHINA VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



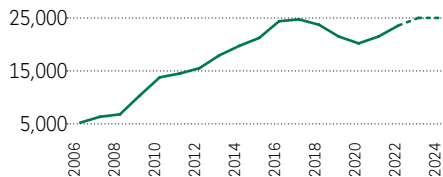
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **23.56** | 2023 **25** (+6%) | 2024 **25** (+0%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

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CHINA VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

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Government subsidies are essential

Share of respondents who view them as **"essential"**



The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

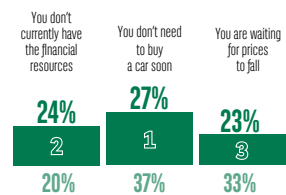
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The Chinese claim to be well informed about cars, to know exactly what the relevant regulations entail, and to know whether or not they are in place in their country. Whilst they believe that subsidies to help people switch to electric vehicles are essential, they do not feel that the way in which they are allocated is unfair. Setting aside the Chinese carmakers, no other region of origin stands out in their eyes in terms of the value for money offered by its brands. They also differ from the rest in thinking that the decision to buy a vehicle is not a difficult one.

France

FRANCE VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



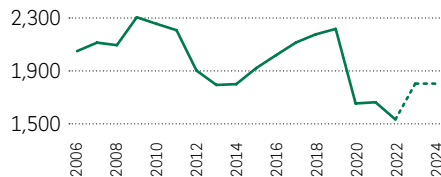
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **1.53** | 2023 **1.8** (+18%) | 2024 **1.8** (+0%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

FRANCE VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



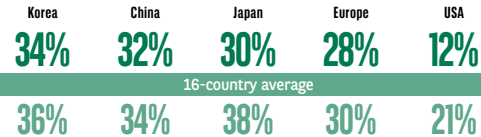
Government subsidies are essential

Share of respondents who view them as **"essential"**



The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

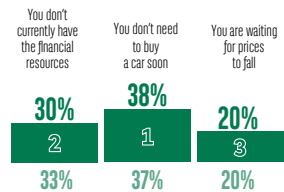
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The French find it difficult to decide to buy a car. They claim to have good knowledge of the regulations on internal combustion engines and traffic restrictions. But they are particularly critical of such measures and believe them to be unfair, especially on low-income households. They also highlight the necessity of subsidies to enable them to go electric. As far as brands are concerned, they are among the least likely to laud American and Japanese carmakers for their value for money.

Germany

GERMANY VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



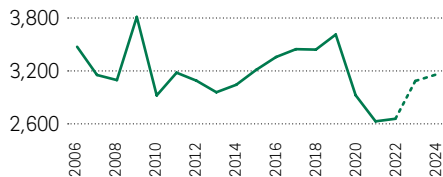
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **2.65** | 2023 **3.08** (+16%) | 2024 **3.15** (+2%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

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GERMANY VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



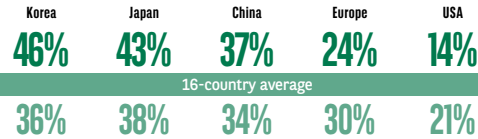
Government subsidies are essential

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The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

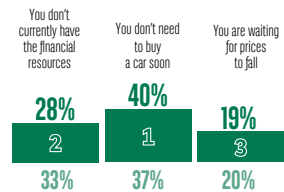
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The majority of Germans feel sufficiently well informed about the latest vehicle regulations, which they believe unfairly penalise lower-income households. Although the second most common reason for delaying a purchase is a lack of financial resources, the Germans are less likely than other populations to consider government subsidies essential. They believe that Korean, Japanese and Chinese brands offer better value for money. On average, they find it easier to make the decision to buy a car than those in other countries.



ITALY VS. WORLD

The passenger car situation

Car ownership rate per 1,000 inhabitants¹ 2022



EPC market share²

Electric or plug-in hybrid 2022



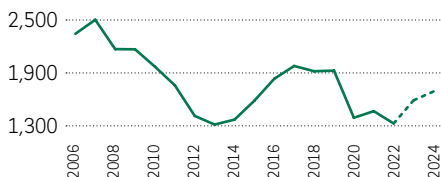
Number of charging points per 1,000 inhabitants³ 2022



Price of petrol⁴ 2022



Annual variation of the NPC market⁵ (In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 1.32 | 2023 1.58 (+20%) | 2024 1.68 (+6%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

ITALY VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



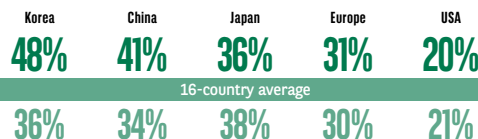
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Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

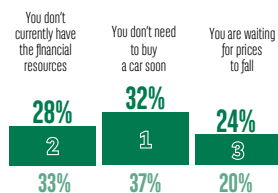
A decision deemed **"difficult"**

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Not only are the Italians aware of the existence of regulations on engine types and traffic restrictions, they also claim to know exactly what they entail. More generally, they feel sufficiently well informed about motoring issues. They award high scores to Chinese and Korean brands, which they feel offer good value for money. Despite Italy having a high level of car ownership, it has one of the lowest levels of electric vehicle ownership in Europe.

Japan

JAPAN VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



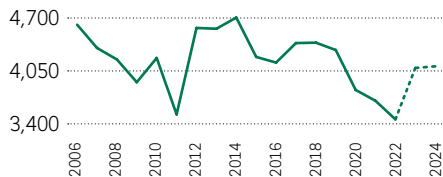
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **3.45** | 2023 **4.08** (+18%) | 2024 **4.1** (+0%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

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JAPAN VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



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Share of respondents who are **aware** of them



A transition to electric under certain conditions

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Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



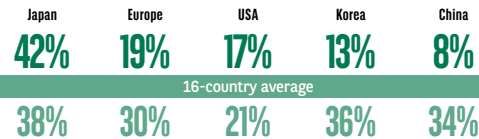
Government subsidies are essential

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The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

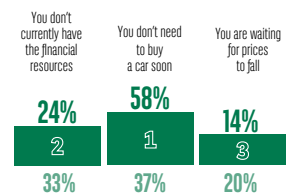
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Although Japan boasts the highest car ownership rate in the survey, it also has the lowest proportion of electric vehicles, with sales of the latter only growing very slowly. The Japanese are not well informed on the topic of regulations. They tend not to know what they entail and are unaware of their existence in their country. In their opinion, not all foreign brands offer good value for money, especially those based in China. If they are holding off on buying a vehicle, that's because they don't need one and believe prices could fall.



Mexico

MEXICO VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



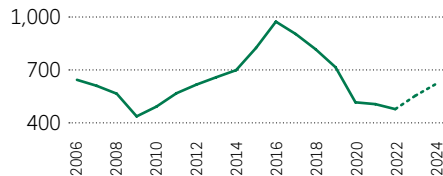
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **0.49** | 2023 **0.58** (+18%) | 2024 **0.65** (+13%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

MEXICO VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



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Share of respondents who know **exactly** what they are



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Buying a car... can wait

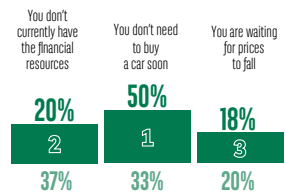
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Mexicans are extremely critical of the new regulations. They don't know whether these measures are in place in their country, are unaware of exactly what they entail and, in any case, consider them to be unfair. They lack the financial resources to buy a car and are keen to receive subsidies to help them switch to electric vehicles. In terms of brands, they have a particular fondness for Chinese and Japanese cars because they offer good value for money.

Netherlands

NETHERLANDS VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



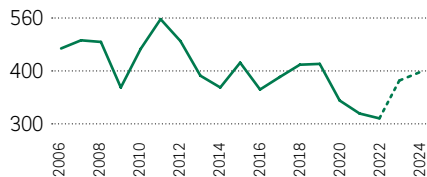
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **0.31** | 2023 **0.41** (+30%) | 2024 **0.43** (+5%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

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NETHERLANDS VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



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Buying a car... can wait

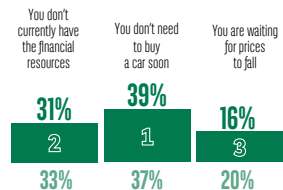
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The Netherlands is one step ahead in the roll-out of electric vehicles, with the highest number of charging points per capita of any country in this survey. When it comes to regulations, their knowledge is particularly vague, since they don't tend to understand what they entail and are the least likely to know whether they exist in their country.

Norway

NORWAY VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



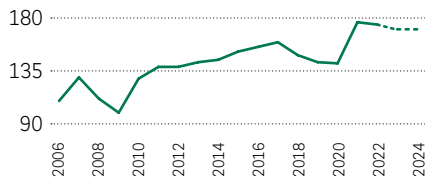
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **0.174** | 2023 **0.170** (-2%) | 2024 **0.170** (0%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

NORWAY VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



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Share of respondents who are **aware** of them



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Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



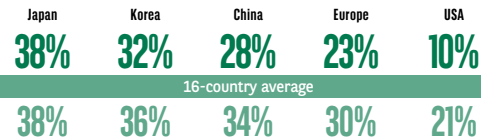
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Buying a car... can wait

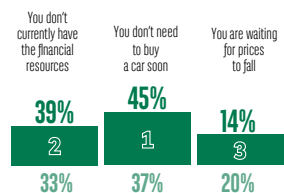
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Norway boasts by far the highest rate of electric vehicle ownership, together with the largest number of charging points. The Norwegians are not entirely sure whether regulations exist in their country. What's more, they don't feel sufficiently informed and don't see exactly what they entail. In their view, American brands do not offer good value for money. They don't believe that buying a car is a difficult decision and they are not waiting for prices to fall before they do so.

Poland

POLAND VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



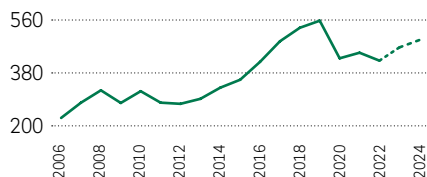
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **0.42** | 2023 **0.47** (+11%) | 2024 **0.49** (+5%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

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POLAND VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



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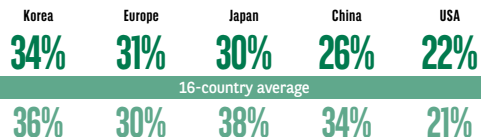
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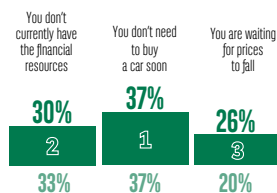
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

In Poland, the high car ownership rate is inversely proportional to the number of charging points in the country. The Poles claim to be sufficiently well informed on the topic of cars. Many of them understand what the new regulations state, but they are also unsure as to whether they exist in their country. They are also the least likely to state that Chinese and Japanese brands offer good value for money. They find the decision to buy a car a difficult one and are delaying such a purchase due to a lack of funds.



Portugal

PORTUGAL VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



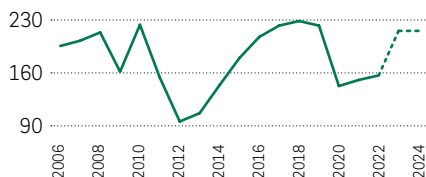
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **0.16** | 2023 **0.22** (+38%) | 2024 **0.21** (-5%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

PORTUGAL VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



Implementation of LEZs

Share of respondents who know **exactly** what they are



A future ban on combustion-powered vehicles

Share of respondents who are **aware** of them



A transition to electric under certain conditions

Low-income households are penalised

Share of respondents who believe the measure requiring combustion-powered cars to be replaced is **unfair**



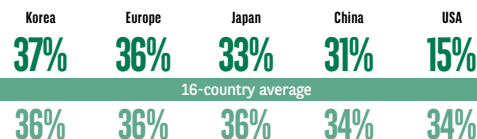
Government subsidies are essential

Share of respondents who view them as **"essential"**



The Asian offensive

Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

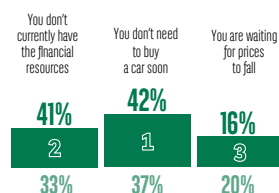
A decision deemed "difficult"

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Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

When it comes to regulations, the Portuguese find themselves in the dark. They don't understand what these measures entail and are unsure whether they exist in their country. In their eyes, European brands offer good value for money. Buying a new vehicle is a tough decision for them to make. A lack of financial resources means that they will have to wait before taking the plunge, and any price reductions are unlikely to encourage them to buy a car any sooner.

Spain

SPAIN VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



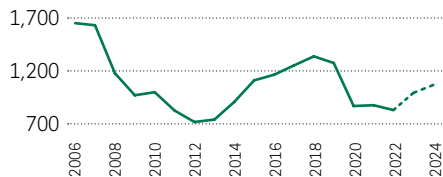
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **0.81** | 2023 **0.98** (+20%) | 2024 **1.05** (+8%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

¹ ACEA & OICA. ² IEA & Marklines. ³ IAE. ⁴ GlobalEconomy. ⁵ OICA, Marklines & C-Ways.

SPAIN VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

Share of respondents who feel sufficiently **informed**



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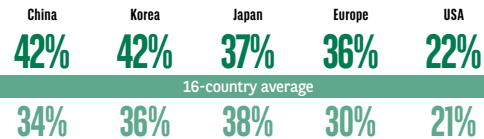
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Buying a car... can wait

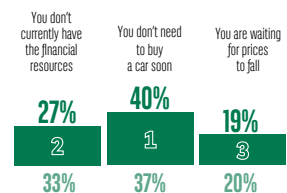
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Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Spain and Italy share similarly low levels of electric vehicle ownership, coupled with equally small numbers of charging points on their road networks. The Spanish believe that it is absolutely essential that subsidies are offered to help people go electric, posting the highest score in the survey on this topic. And like the Italians, once again, they consider themselves sufficiently well-informed on automotive issues. However, this does not make the decision to buy a car any easier.

TRUCKY VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



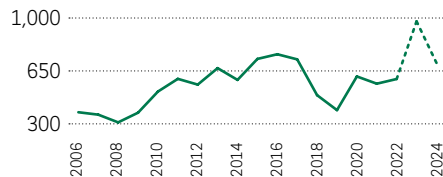
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **0.59** | 2023 **0.98** (+65%) | 2024 **0.75** (-23%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

TRUCKY VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

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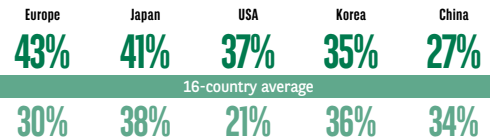
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Buying a car... can wait

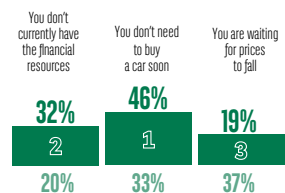
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

Of all the countries surveyed, Turkey is the nation where people find the decision to buy a car the most difficult. And if they delay such a purchase, it is often due to a lack of financial resources. Naturally, they believe that subsidies are essential to encourage people to switch to electric cars. While they are not particularly impressed by the value for money offered by Chinese carmakers, the opposite is true when it comes to American brands. They seem quite oblivious to what the new regulations entail.



United Kingdom

UNITED KINGDOM VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



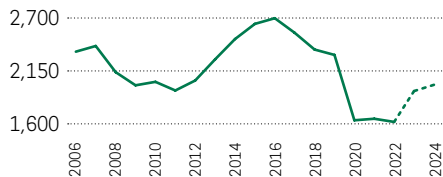
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(in thousands of vehicles)



Market forecasts⁵ (in millions of new cars)

2022 **1.61** | 2023 **0.22** (+38%) | 2024 **0.21** (-5%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

¹ ACEA & OICA. ² IEA & Marklines. ³ IAE. ⁴ GlobalEconomy. ⁵ OICA, Marklines & C-Ways.

UNITED KINGDOM VS. 16-COUNTRY AVERAGE

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Buying a car... can wait

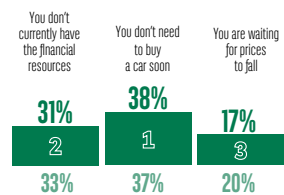
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

The British don't appear to find the decision to buy a car particularly difficult. And they are not waiting for a possible fall in prices to make the move. Many of them consider that Chinese brands offer good value for money. They also claim to have a good awareness and understanding of local regulations, which are the subject of intense public debate in the country, particularly when it comes to traffic restrictions.



United States

UNITED STATES VS. WORLD

The passenger car situation

Car ownership rate
per 1,000 inhabitants¹ 2022



EPC market share²
Electric or plug-in hybrid 2022



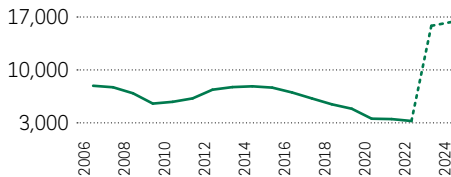
Number of charging points
per 1,000 inhabitants³ 2022



Price of petrol⁴
2022



Annual variation of the NPC market⁵
(In thousands of vehicles)



Market forecasts⁵ (In millions of new cars)

2022 **3.1** | 2023 **15.7** (+407%) | 2024 **16.5** (+5%)

The catch-up process still in effect in 2023, after the supply chain issues of the Covid years, is likely to gradually run out of steam in 2024. Moreover, it looks set to be further impacted by persistently high prices and interest rates.

UNITED STATES VS. 16-COUNTRY AVERAGE

The new regulations are poorly understood

Level of knowledge

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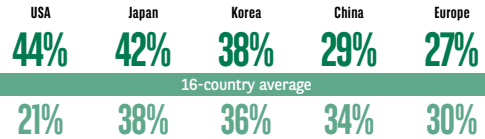
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Share of respondents who associate the brands with **good value for money**



Buying a car... can wait

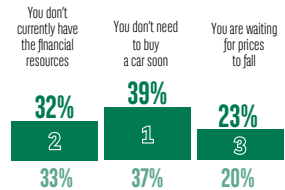
A decision deemed "difficult"

Share of respondents who believe that buying a car is **difficult**



Top 3 reasons to wait before buying a car

To those who want to buy a car but **not in the next 12 months**



SUMMARY

In the country where the car is king, motorists find the decision to buy a vehicle easier than any other population. Americans favour local brands when it comes to value for money, while being dismissive of Chinese brands. They consider subsidies essential in nudging people towards electric cars. When it comes to knowledge about regulations, Americans score close to the average.