Perception of the crisis of the automotive sector in Europe

December 2024



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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 28th of November and the 7th 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)

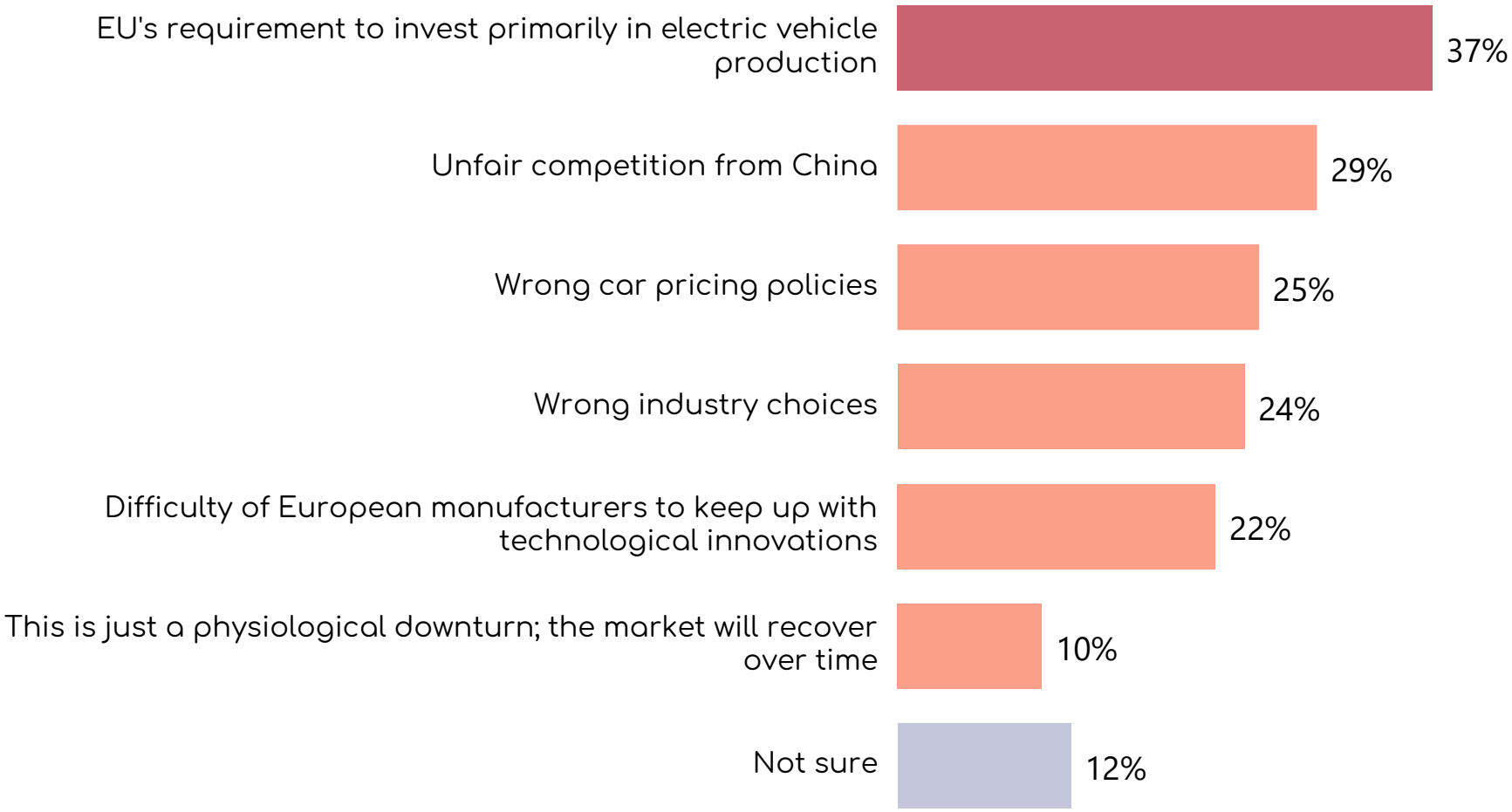


\+ separate data for Italy and Spain

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

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	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

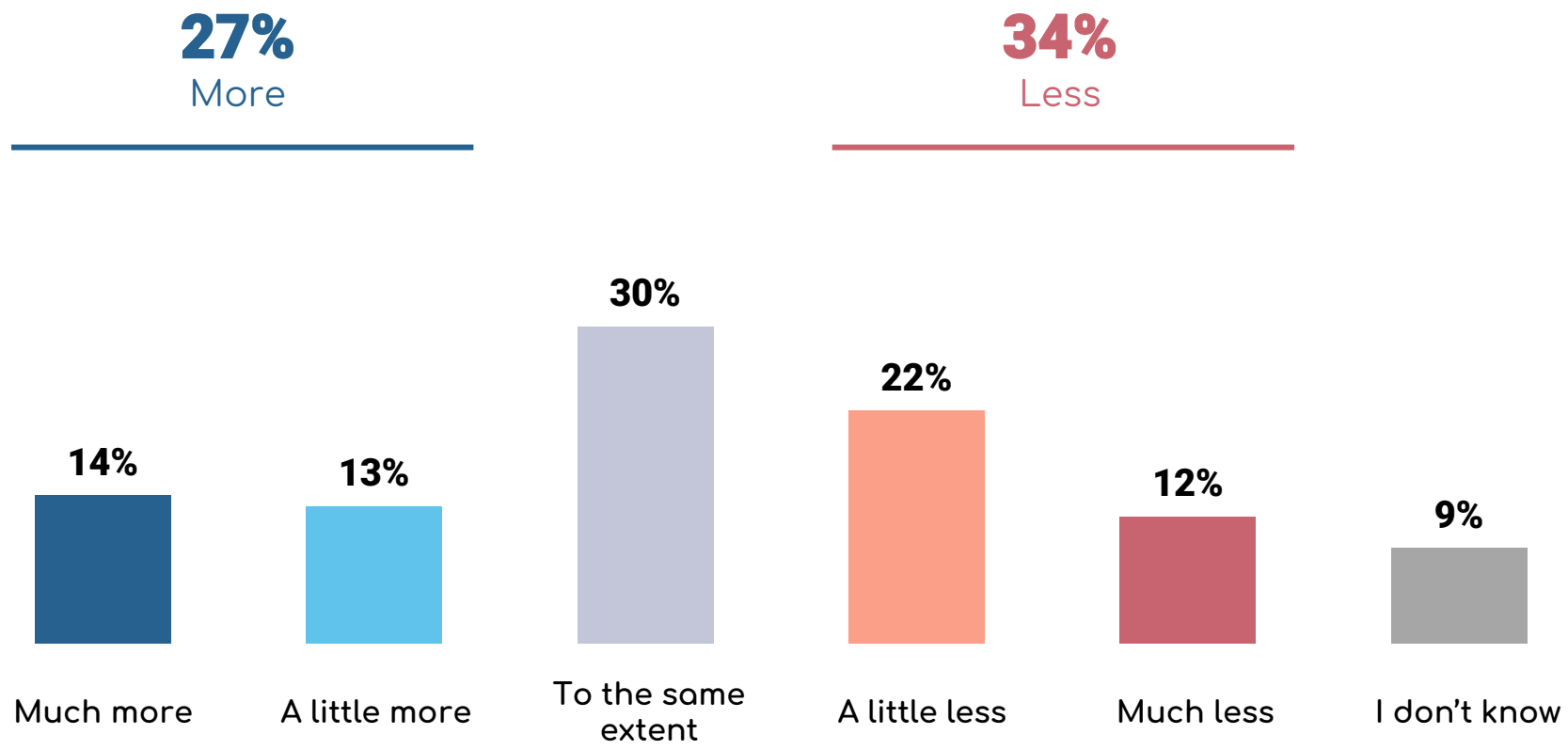
All respondents: 5.112

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

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

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5.112	973	748	1.511	694	557	1.134	746
Total «more»	**27%**	**28%**	**28%**	**23%**	**23%**	**25%**	**27%**	**29%**
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	**30%**	**34%**	**40%**	**28%**	**29%**	**26%**	**26%**	**29%**
Total «less»	**34%**	**30%**	**20%**	**41%**	**38%**	**42%**	**38%**	**32%**
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	**9%**	**8%**	**12%**	**8%**	**10%**	**7%**	**9%**	**10%**

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

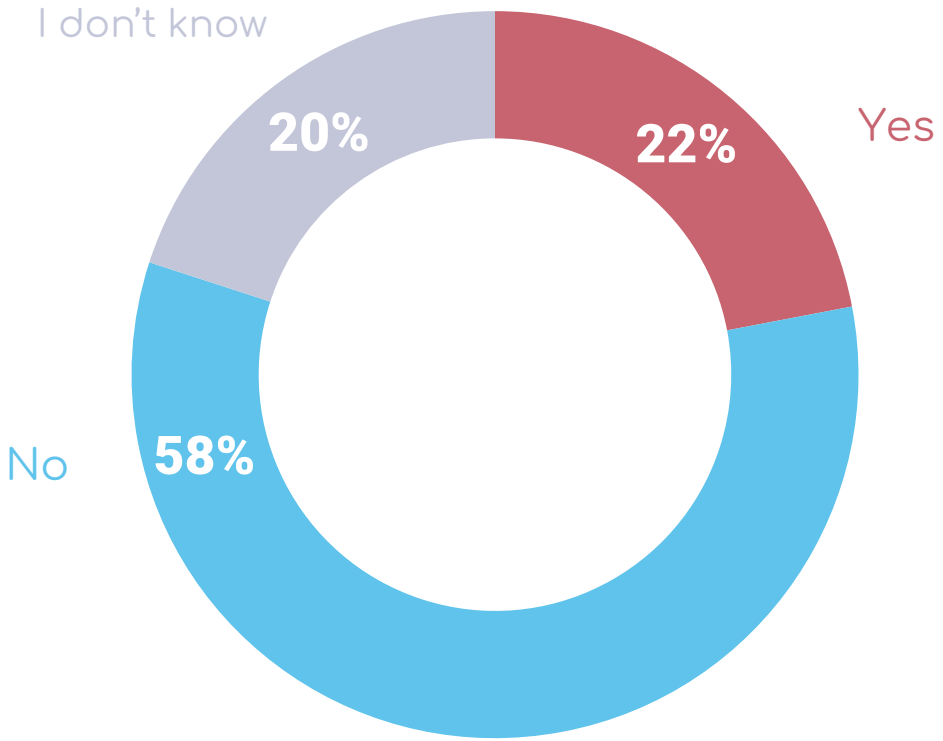
All respondents: 5.112

	TOTAL	GUE/NGL	S&D	Greens	RE	EPP	ECR	Patriots	ESN
Base	5.112	339	775	333	379	852	318	583	239
Total «more»	**27%**	**27%**	**18%**	**16%**	**25%**	**28%**	**31%**	**34%**	**44%**
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	**30%**	**34%**	**29%**	**28%**	**31%**	**30%**	**30%**	**35%**	**33%**
Total «less»	**34%**	**33%**	**44%**	**51%**	**38%**	**36%**	**31%**	**23%**	**18%**
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	**9%**	**6%**	**9%**	**5%**	**6%**	**6%**	**8%**	**8%**	**5%**

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

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5.112	973	748	1.511	694	557	1.134	746
Yes	22%	20%	15%	22%	14%	24%	24%	25%
No	58%	63%	66%	56%	63%	54%	53%	56%
I don't know	20%	17%	19%	22%	23%	22%	23%	19%

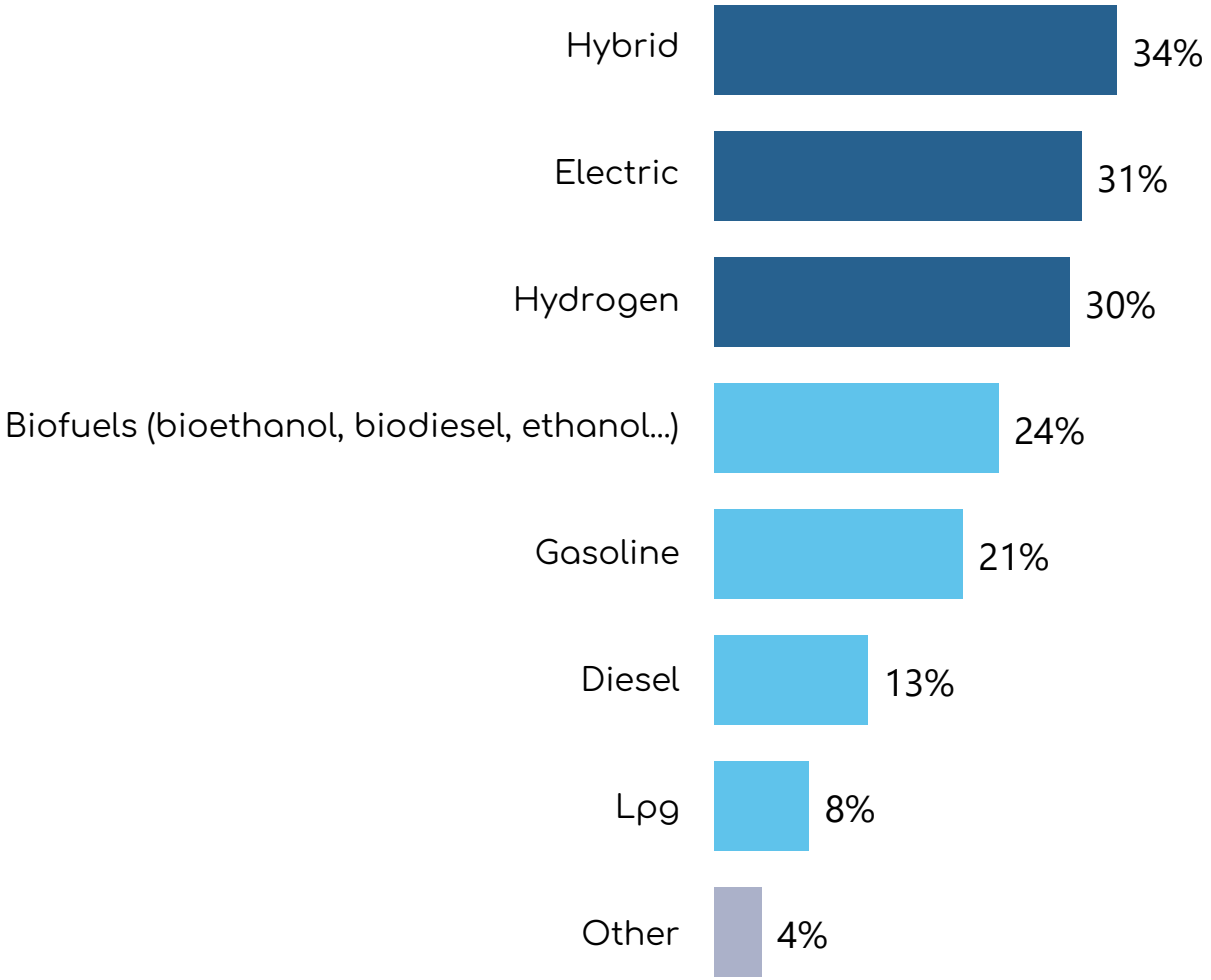
*Including Italy and Spain

	TOTAL	GUE/NGL	S&D	Greens	RE	EPP	ECR	Patriots	ESN
Base	5.112	339	775	333	379	852	318	583	239
Yes	22%	26%	27%	24%	26%	24%	18%	22%	19%
No	58%	58%	51%	53%	55%	59%	62%	60%	71%
I don't know	20%	16%	22%	23%	19%	17%	20%	18%	10%

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

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	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

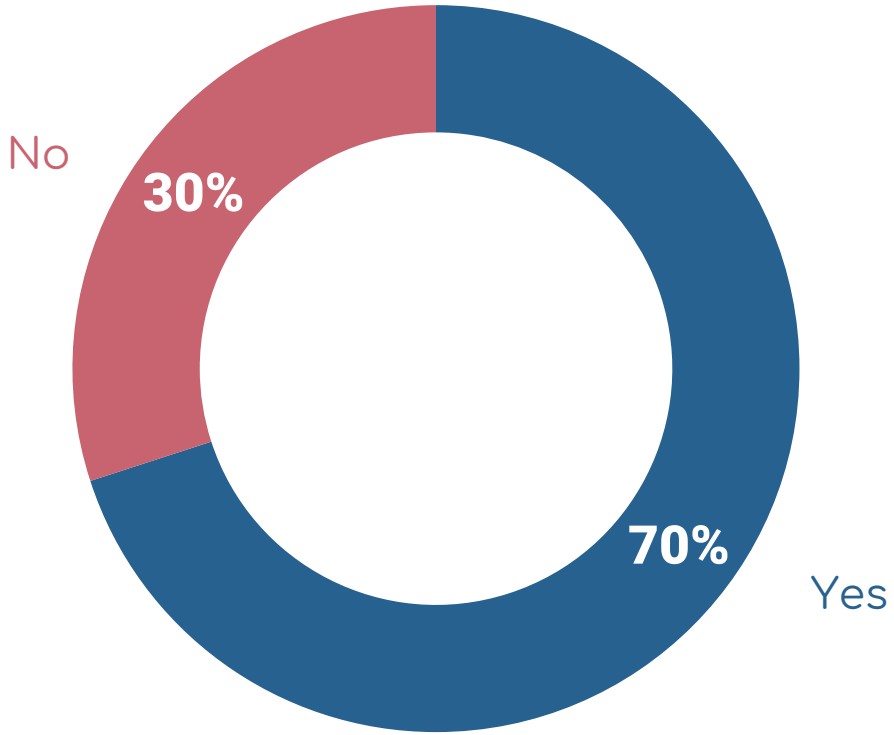
All respondents: 5.112

	TOTAL	GUE/NGL	S&D	Greens	RE	EPP	ECR	Patriots	ESN
Base	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

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

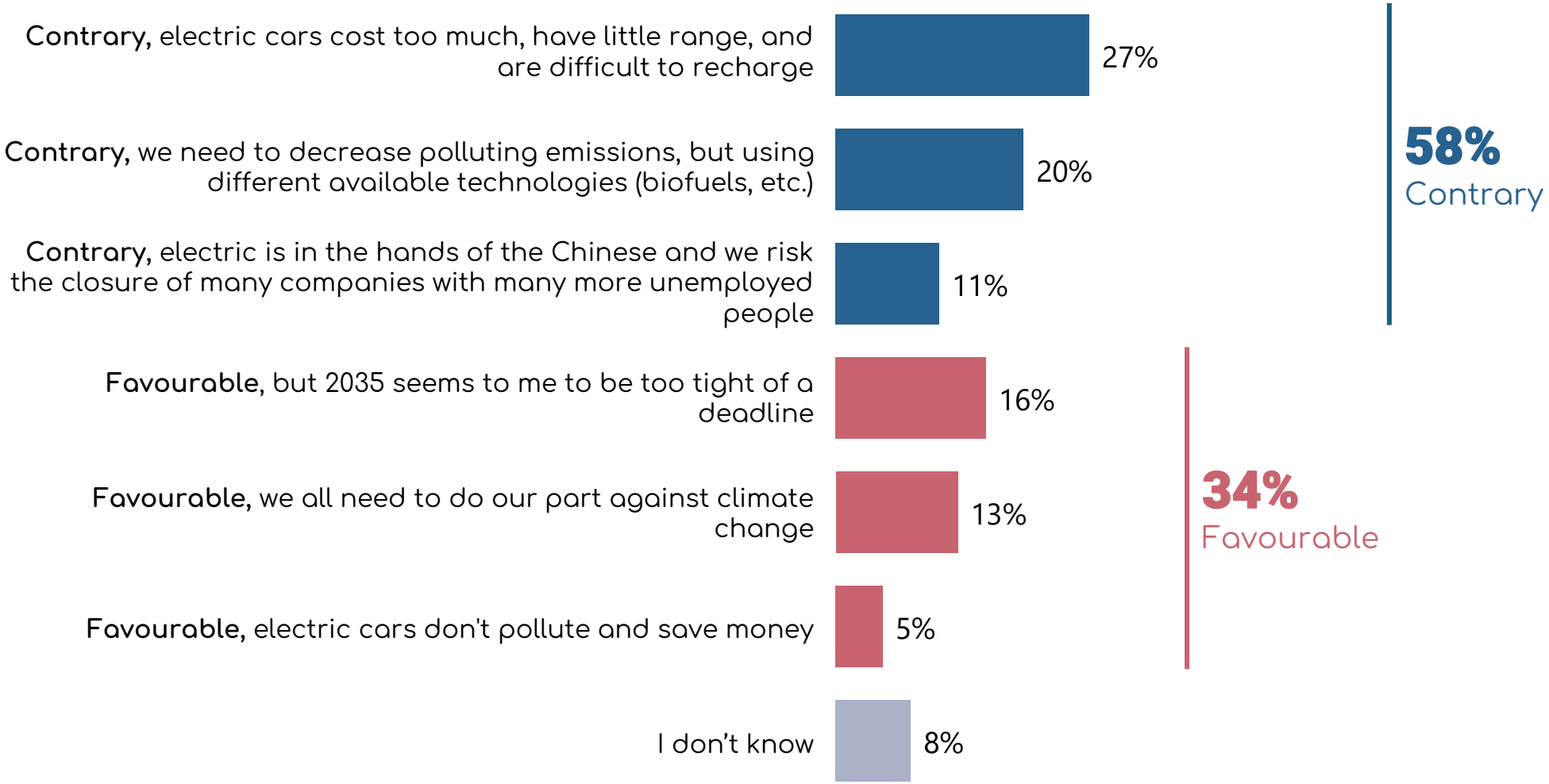
**Including Italy and Spain*

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

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?

Opinions in regard to the diesel and gasoline car ban

All respondents: 5.112



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

Opinions in regard to the diesel and gasoline car ban

All respondents: 5.112

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5.112	973	748	1.511	694	557	1.134	746
SUM «CONTRARY»	**58%**	**59%**	**67%**	**56%**	**59%**	**57%**	**54%**	**51%**
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%
SUM «FAVOURABLE»	**34%**	**31%**	**24%**	**38%**	**34%**	**39%**	**37%**	**37%**
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%
I don't know	**8%**	**10%**	**9%**	**6%**	**7%**	**4%**	**9%**	**12%**

**Including Italy and Spain*

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

Opinions in regard to the diesel and gasoline car ban

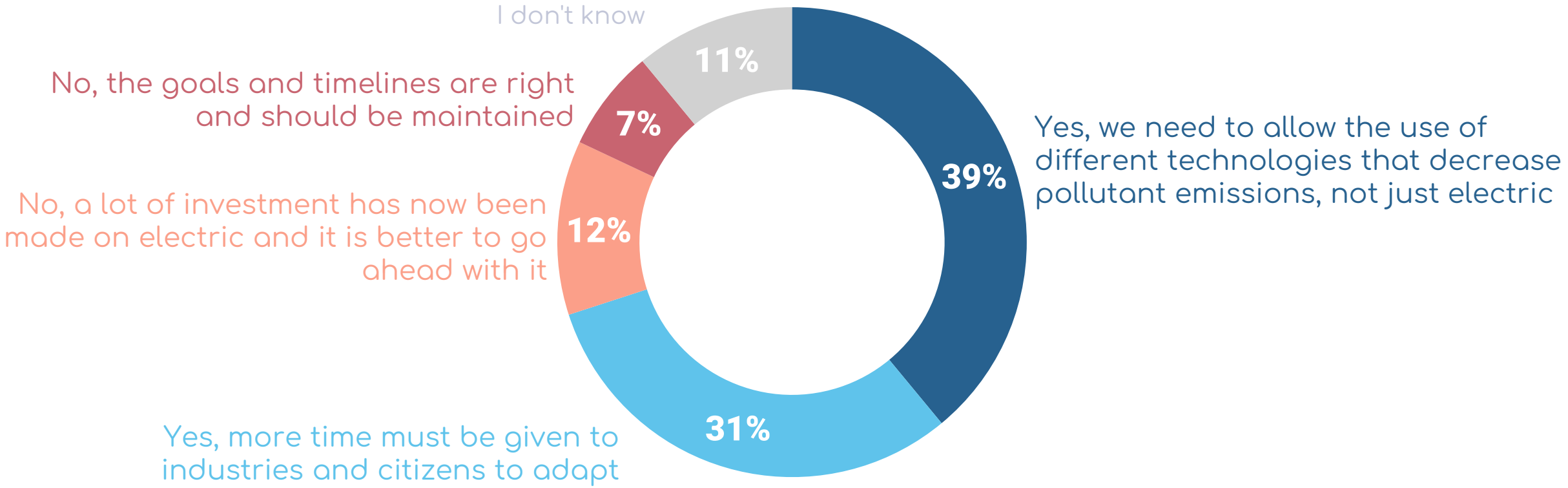
All respondents: 5.112

	TOTAL	GUE/NGL	S&D	Greens	RE	EPP	ECR	Patriots	ESN
Base	5.112	339	775	333	379	852	318	583	239
SUM «CONTRARY»	**58%**	**58%**	**47%**	**44%**	**57%**	**58%**	**61%**	**67%**	**77%**
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%
SUM «FAVOURABLE»	**34%**	**38%**	**45%**	**52%**	**38%**	**37%**	**31%**	**27%**	**18%**
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%
I don't know	**8%**	**4%**	**8%**	**4%**	**5%**	**5%**	**8%**	**6%**	**5%**

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



Q. Would you agree with a review of the EU legislation on the ban on the sale of new diesel and gasoline cars from 2035?

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

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5.112	973	748	1.511	694	557	1.134	746
SUM «YES»	**70%**	**68%**	**71%**	**72%**	**70%**	**75%**	**69%**	**66%**
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»	**19%**	**22%**	**16%**	**19%**	**20%**	**16%**	**20%**	**20%**
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	**11%**	**10%**	**13%**	**9%**	**10%**	**9%**	**11%**	**14%**

*Including Italy and Spain

Q. Would you agree with a review of the EU legislation on the ban on the sale of new diesel and gasoline cars from 2035?

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

	TOTAL	GUE/NGL	S&D	Greens	RE	EPP	ECR	Patriots	ESN
Base	5.112	339	775	333	379	852	318	583	239
SUM «YES»	**70%**	**67%**	**70%**	**56%**	**69%**	**77%**	**73%**	**74%**	**75%**
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»	**19%**	**25%**	**20%**	**36%**	**23%**	**16%**	**18%**	**15%**	**17%**
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	**11%**	**8%**	**10%**	**8%**	**8%**	**7%**	**9%**	**11%**	**8%**

Q. Would you agree with a review of the EU legislation on the ban on the sale of new diesel and gasoline cars from 2035?



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Located in the heart of Brussels, Polling Europe specializes in conducting comprehensive public affairs surveys and opinion polls, delving into the nuanced landscape of EU public opinion.
Our expertise spans both ad hoc research endeavors and meticulously crafted multi-client surveys, providing quick and cost-effective insights into European public opinion.
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