

AUTO

2022



THE BOLD TRAJECTORY OF THE SUV

| An international survey
conducted in 17 countries

OBSERVATOIRE
Cetelem

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EDITORIAL

The automotive sector is in deep crisis, a crisis that has affected the entire industry, from carmakers to component manufacturers, not to mention distributors, themselves an important source of employment. Initially triggered by a pandemic that has brought factories to a halt and closed dealerships, the current crisis revolves around electronic component supply chain problems. Having previously run into difficulties due to oversupply, the automotive industry is now faced with an unprecedented crisis brought about by vehicle shortages! This has resulted in lengthy delivery times, lower spec vehicles being supplied and short-time working in plants.

It is difficult to predict when normality will resume and 2022 will see continued disruption. It is also not surprising that manufacturers have focused on producing vehicles that generate higher margins, of which SUVs are a prime example.

So, let's talk about SUVs. They are the focus of *L'Observatoire Cetelem de l'Automobile 2022*.

These vehicles are somewhat divisive. However, despite lively debate around their environmental impact, SUVs have been staggeringly successful. Almost unheard of barely 15 years ago, they are now omnipresent and account for almost 40% of new passenger vehicle sales.



What explains the success of the SUV, which could almost stand for "Schizophrenic Utility Vehicle"? It is undeniable that these are popular vehicles which fulfil many requirements and bring a great deal of satisfaction. This is a segment with a bright future, if we are to judge from the purchase intentions of motorists. And this future does not appear to be threatened by the upcoming electrification of the automotive market.

To use a term that is increasingly common nowadays, the SUV may well possess the resilience required to overcome this crisis. So, could its bold trajectory one day represent a lasting example of success?

Flavien Neuvy

Head of L'Observatoire Cetelem

L'OBSERVATOIRE CETELEM

Founded in 1985 and headed by Flavien Neuvy, L'Observatoire Cetelem is an economic research and intelligence unit of BNP Paribas Personal Finance.

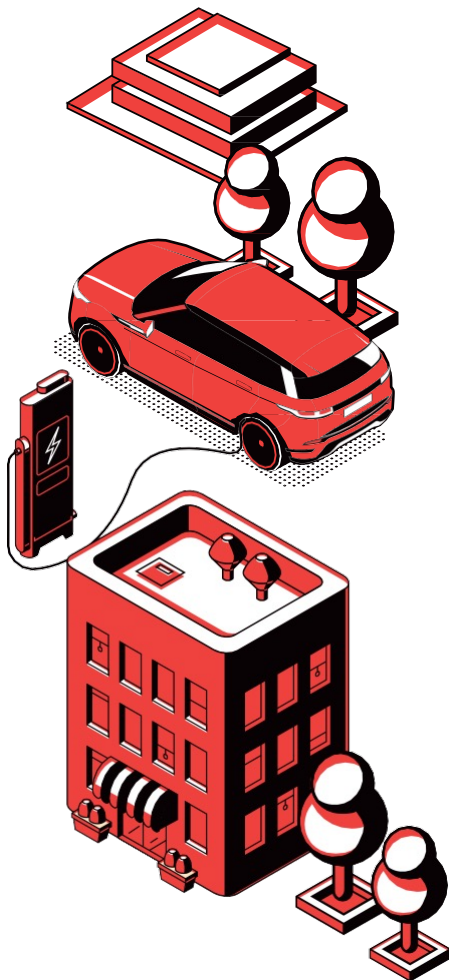
Its mission is to observe, analyse and interpret shifts in consumption patterns in France and abroad. To fulfil this ambition, L'Observatoire Cetelem has set up a range of tools that rely on diverse and complementary content, including:

- **The Observatoires:** Two highly respected annual surveys conducted internationally: a worldwide survey on the automotive market (17 countries) and a European survey on consumer trends (17 countries).
- **The zOOMs, which focus on lifestyles** and explore major themes (sustainable tourism, remote working, the role of animals in society, etc.) in three stages, by gathering the opinion of French citizens via three-wave surveys.
- **L'Œil, a spotlight on new developments in the retail sphere** and on the latest micro-initiatives heralding the key innovations and shifts that could shape tomorrow's consumer trends.

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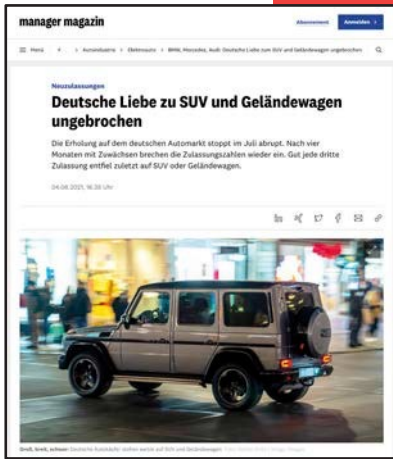
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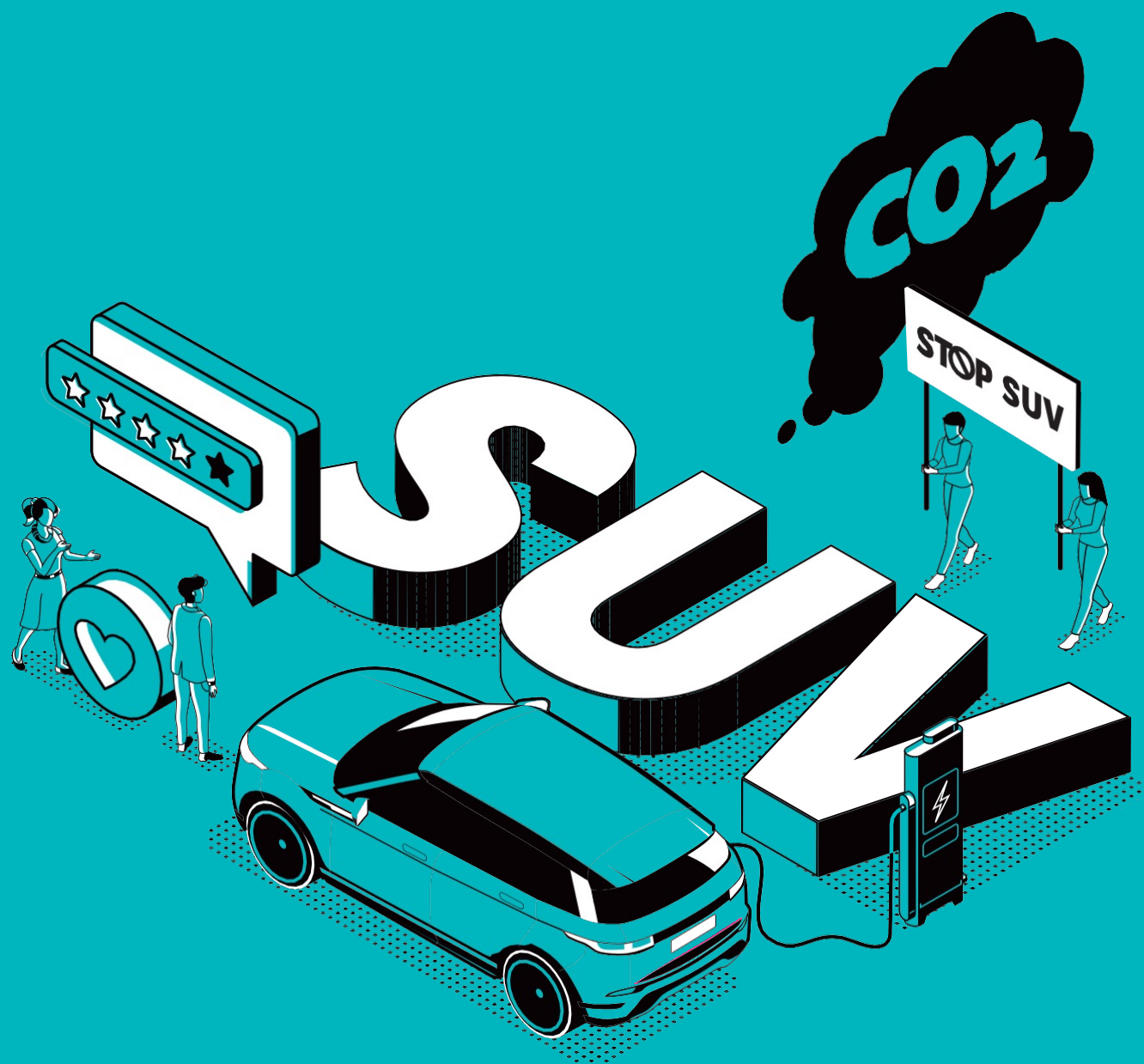
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PRESS REVIEW

The debate around SUVs is a global one







1

SUV: THREE DIVISIVE LETTERS

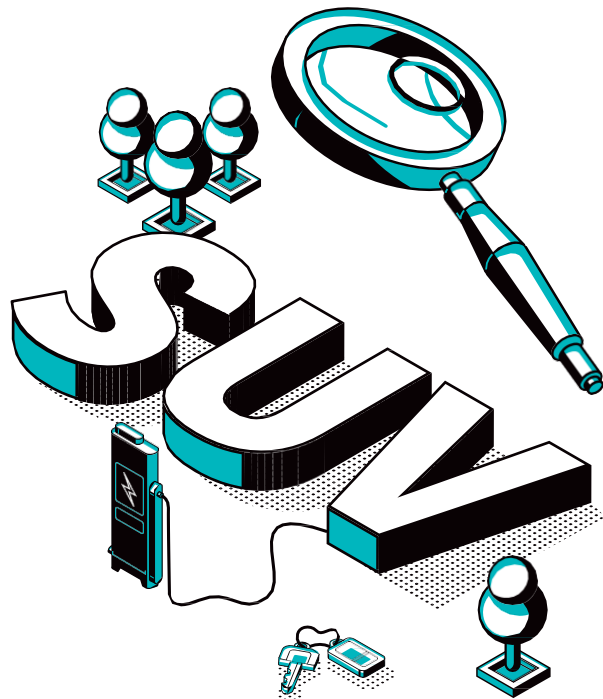
There are only a few letters' difference between the words acronym and anonymity, with a concept's meaning often hidden in the former to the detriment of wider awareness. However, this is not something that can be said about the term "SUV". Indeed, these three letters have been extremely quick to make their mark on the automotive world. Yet, rightly or wrongly, these three letters are the subject of much discussion, not always based on rational arguments, leading to a degree of polarisation that is quite unusual.

A VEHICLE WHOSE IDENTITY IS UNCLEAR

THREE LETTERS WITH MULTIPLE MEANINGS

When an acronym becomes a common noun, this is often a mark of its success. The term SUV is the perfect example. In the space of four decades, it has become such a widely used term across the world that one almost forgets what the letters stand for.

So it is worth reminding ourselves that SUV stands for Sport Utility Vehicle. Behind this acronym swirls a semantic maelstrom that conceals all sorts of considerations. The words themselves vary in meaning depending on the country in which they are used. In its most literal sense, “utility” refers to the practical and utilitarian nature of such a vehicle, while “sport” (which is sometimes spelled with an “s”) refers more to outdoor leisure pursuits than to the car’s sportiness or performance. The term “vehicle” may seem more transparent, but it can also carry a hidden meaning, since the word tends to be used instead of “light truck” in the United States, for reasons relating to fuel consumption regulations.



OUR WORKING DEFINITION OF SUV

For this survey, we relied on a definition that is broad enough to reflect the reality and diversity of the SUV segment. Today, we consider an SUV – short for “Sport Utility Vehicle” – to be any family car whose styling resembles that of a sporty off-roader. Although this is a diverse category, certain features are common to all SUVs: an elevated ride height and driving position, with a taller stance and more interior space than other vehicles of a similar size. And while this is not generally the case, some SUVs also offer 4-wheel drive or a high towing capacity.

If we stick to a strictly automotive frame of reference, it seems impossible to determine which vehicle was the first in a long line of SUVs. The Jeep Wagoneer, Range Rover, Toyota RAV4 and Suzuki Vitara were all stepping stones that preceded the emergence of cars like the Volvo XC and the Nissan Qashqai in the 2000s. What's more, the very nature of the various vehicles on offer further muddies the waters. With the option of four-wheel drive, two-wheel drive or the ability to switch between the two, but also vehicles that are sometimes based on saloon car platforms and sometimes not, it is difficult to decide which SUV to pick.

It is also worth noting that a French vehicle registration document cannot carry the description “SUV” and that this is not a term legally defined by the type approval authorities.

UNCERTAIN ORIGINS

The term SUV actually appears to predate the vehicles to which it refers today, having been used in the United States as early as the 1940s. Indeed, the Willys jeep, widely considered to be the forerunner of the modern SUV, could be seen cruising around the roads of Europe during the Second World War. To find the SUV's ultimate forefather, one could even go back to 1935 to pull the Chevrolet Suburban Carryall from the mists of time. From a marketing perspective, the term Sport Utility Vehicle began its semantic journey into common parlance in a brochure for the 1974 Jeep Cherokee.

A VARIETY OF DESIGNATIONS

To further complicate matters, carmakers have removed the three letters from the back of their vehicles and launched headlong into a process of creative brainstorming to explore new semantic territory. So we now have crossovers, what the media likes to call faux 4x4s and even Sport Activity Vehicles. Even language specialists struggle to define the genre with any real precision. Indeed, a leading French dictionary publisher once incurred the wrath of the French Association of Vehicle Manufacturers for defining an SUV as “a four-wheel drive MPV”. The fact is that only a small proportion of SUVs are equipped with four-wheel drive.

BODY SHAPE ISN'T EVERYTHING

The motorists surveyed for this 2022 edition of L'Observatoire Cetelem de L'Automobile attest to the ambiguity surrounding the SUV concept. We asked them to identify which of nine silhouettes belonged to SUVs (**Fig. 1**).

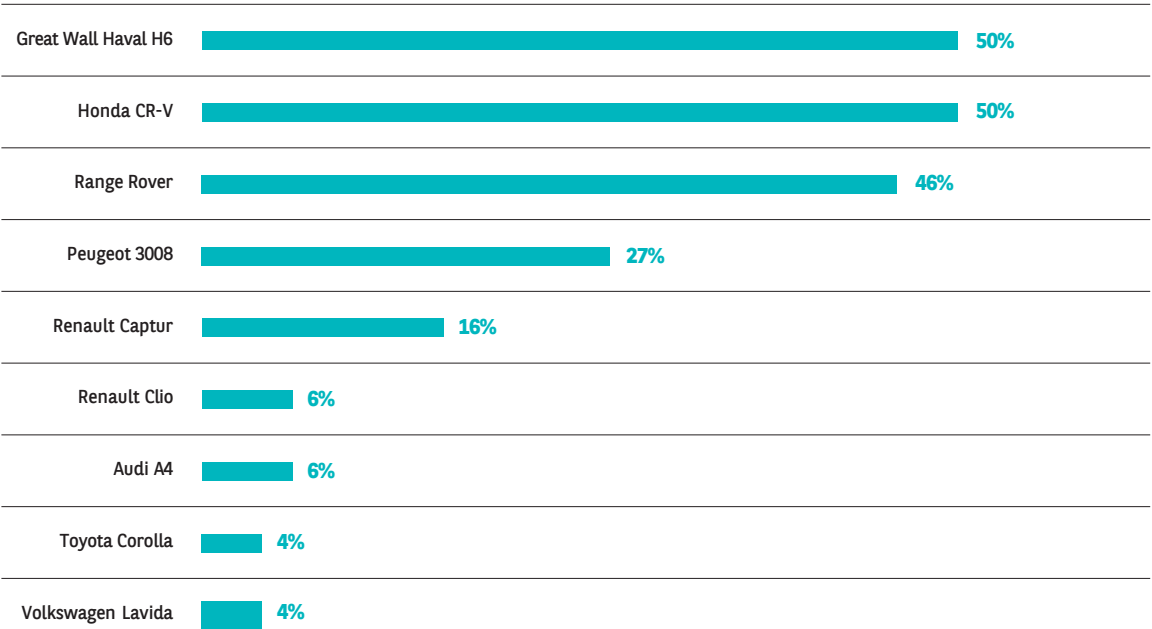
They had no trouble recognising the saloons. More than 9 out of 10 respondents identified them as such. But when it came to identifying the SUVs,

they were much less successful. Indeed, while the Greatwall Haval, the Honda CRV and the Range Rover were singled out as SUVs by 1 in 2 respondents, the Peugeot 3008 was only picked by a quarter of those surveyed. And only 16% thought the shape of the Renault Captur resembled that of an SUV.

Fig. 1

Which of these vehicles do you consider to be an SUV?

Several possible answers. Percentage of respondents who selected each model.



Source: L'Observatoire Cetelem de L'Automobile 2022.

AN IMAGE THAT VARIES GEOGRAPHICALLY

MOTORISTS ARE OFTEN INCORRECT IN THEIR BELIEF THAT THEY OWN AN SUV

As we have seen, attempting to recognise a vehicle based purely on its silhouette can be a difficult task. However, the answers given by motorists when asked whether or not they own an SUV are even more indicative of the confusion surrounding these vehicles and their identification.

Overall, just 5% of those who do not believe they own an SUV are mistaken about the type of vehicle they have (**Fig. 2**). However, 45% of motorists who think they own an SUV are actually mistaken in their belief. These percentages are practically identical to those obtained when the respondents were asked to identify the silhouettes.

First and foremost, these results highlight great geographical disparity. For example, respondents in Brazil, Mexico and Turkey, three countries with

emerging economies, are the most likely to be mistaken (68%, 62% and 61%, respectively). Poland follows close behind, again with a high number of erroneous opinions (58%). In contrast, fewer motorists answer incorrectly in European countries such as Italy, Norway and France (22%, 30% and 34%). The United States, the birthplace of the SUV and the home of the minivan, also boasts a relatively low error rate (29%).

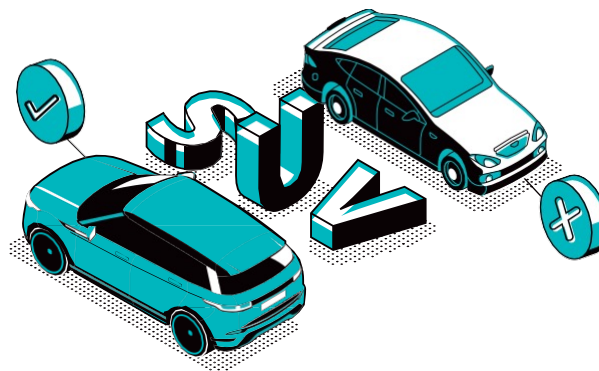
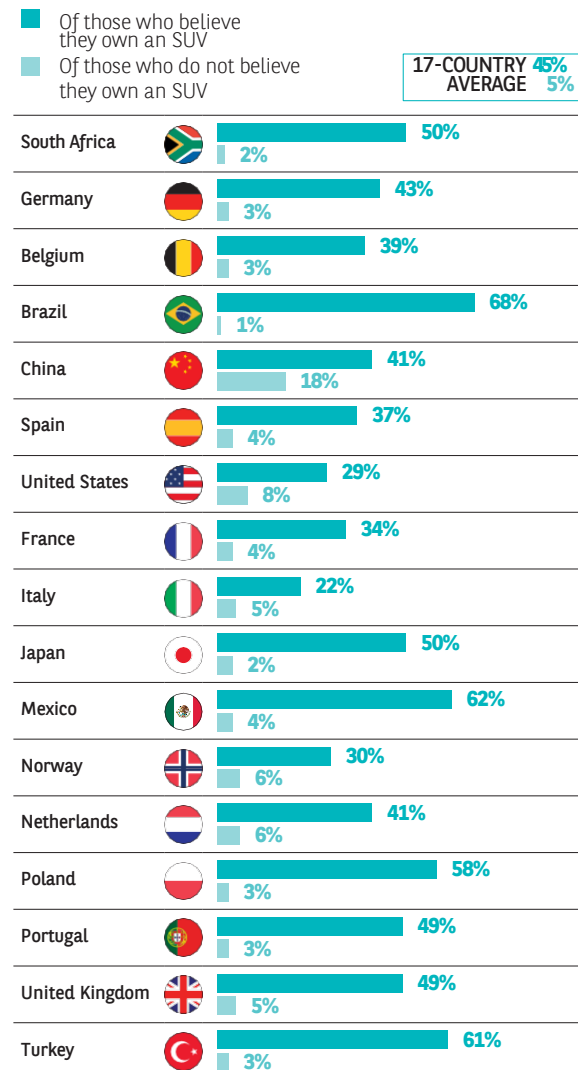


Fig. 2**Percentage of vehicle owners who are mistaken about the type of vehicle they own**

Only one possible answer.

Base: owners of a vehicle.



Source: L'Observatoire Cetelem de l'Automobile 2022.

VALUE FOR MONEY IS A KEY SELLING POINT IN EMERGING COUNTRIES

A similar geographical dichotomy can be observed between emerging and Western countries when it comes to the value for money SUVs offer. This is an attribute on which the South Africans and Mexicans are the most keen, with responses that are not far from unanimous (93% and 90%) (**Fig. 3**). This leading pair are trailed by Turkey, China, Poland, the United States and Brazil, where almost 8 out of 10 motorists appreciate the value for money that SUVs offer. What do most of these countries have in common? Major urban metropolises, vast expanses of land and frequent long journeys by road, factors that go some way to explaining why people opt for a vehicle that has multiple uses and sufficient space for a family that might be quite large. On which more later.

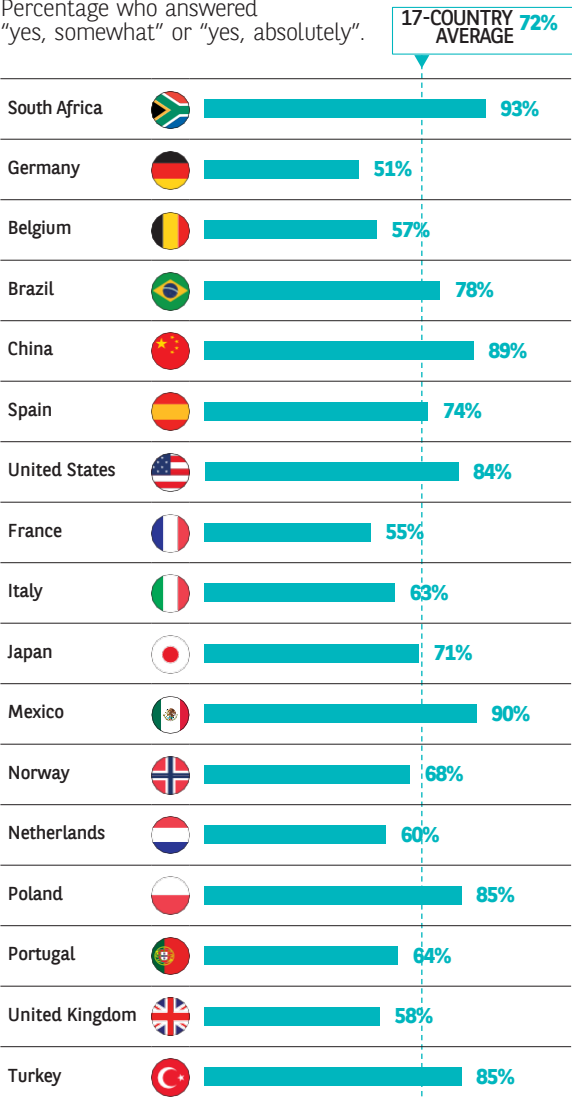
A VARIETY OF USES

The locations in which people use their cars also reveal contrasts between the Western nations and the other countries featured in the survey. Outside Europe, SUVs are mostly driven in town or in urban areas (58%) (**Fig. 4**). The Brazilians and Chinese are by far the most likely to use their vehicle in this way (83% and 72%). Conversely, SUV use in Europe tends to be much less concentrated in cities and their immediate outskirts (34%). In Belgium and the Netherlands, two countries where cyclists rule in towns, just 16% and 20% of SUV drivers use them in urban environments, respectively. Throughout the course of the survey we will see that geographical differences often structure people's opinions of SUVs.

Fig. 3

Do you believe that SUVs offer good value for money?

Only one possible answer.
Percentage who answered
"yes, somewhat" or "yes, absolutely".

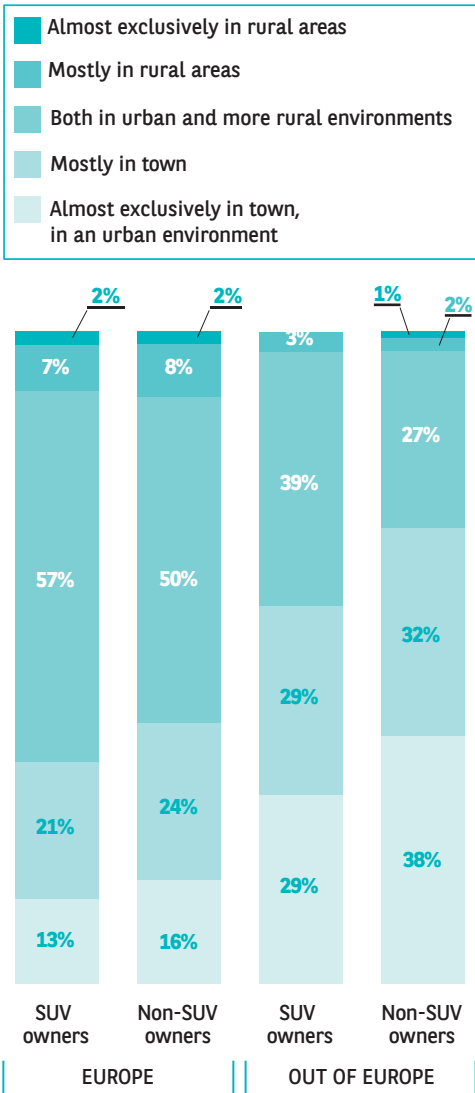


Source: L'Observatoire Cetelem de l'Automobile 2022.

Fig. 4

How do you use your vehicle?

Only one possible answer.
Base: owners of a vehicle



Source: L'Observatoire Cetelem de l'Automobile 2022.

OWNING ONE MAKES ALL THE DIFFERENCE

A NEGATIVE IMPACT IN THE EYES OF NON-OWNERS

While geography evidently plays a part in shaping the image and uses associated with SUVs, the very fact of owning one is also a dividing force.

Since their inception, but especially since their dazzling rise shook up the automotive industry, SUVs have been the subject of much criticism, a topic we shall return to later. Whether it be their environmental impact, the danger they pose to pedestrians or their sheer bulk and the space they take up on streets, it is easy to find fault in these vehicles.

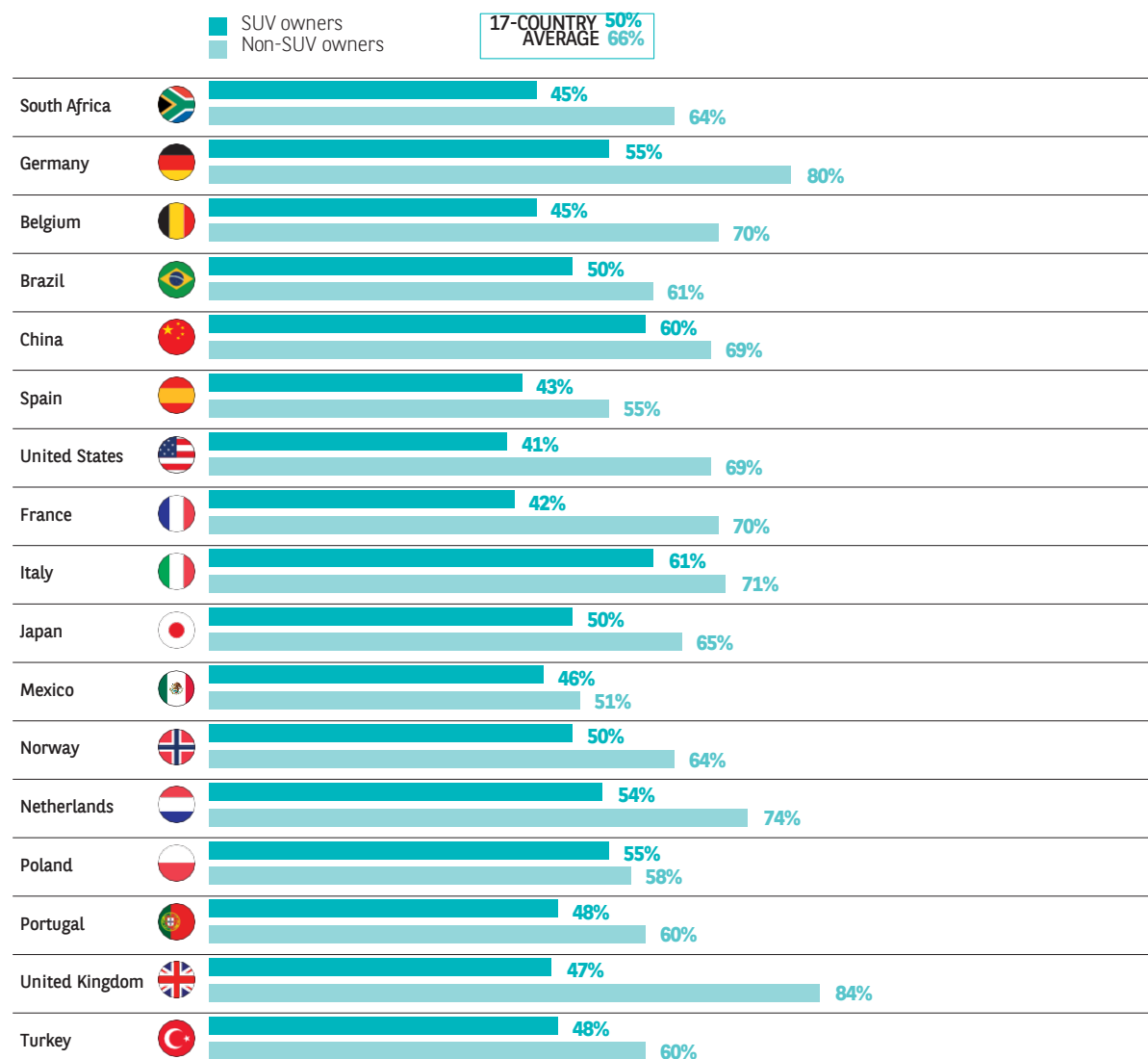
In this respect, the difference between owners and non-owners of SUVs is particularly stark. Around 2 in 3 non-owners believe this criticism is justified. This opinion is particularly prevalent in the UK and Germany (84% and 80%) while Mexicans and Spaniards who do not drive SUVs display greater tolerance (51% and 55%) (**Fig. 5**). Just 1 in 2 owners of SUVs consider the criticism to be justified, with the Americans, French and Spanish being the least likely to hold this view (41%, 42% and 43%).



Fig. 5

**SUVs are the target of all kinds of criticism (environmental impact, size, hazard posed to pedestrians, etc.).
Would you say that these criticisms are justified?**

Only one possible answer. Percentage who answered "somewhat justified" or "absolutely justified".



Source: L'Observatoire Cetelem de l'Automobile 2022.

JUST A PASSING FAD

Non-SUV owners are also critical when it comes to the reasons why people buy them. Their main criticisms revolve around the idea that this is a somewhat frivolous and narcissistic choice. In their opinion, the main reason why people buy SUVs is to follow a trend (**Fig. 6**). 43% of those who do not own an SUV are of this belief and the proportion is even higher among those aged over 55 (52%). This is a factor cited by at least half of respondents in Portugal, France and Germany. In contrast, only a quarter of Americans agree with this point.

As well as believing that those who own an SUV are simply following a trend, non-owners also suspect that they want to stand out from the crowd, a view held by more than half of the Poles and Turks surveyed, compared with 1 in 5 respondents from Japan and Norway.

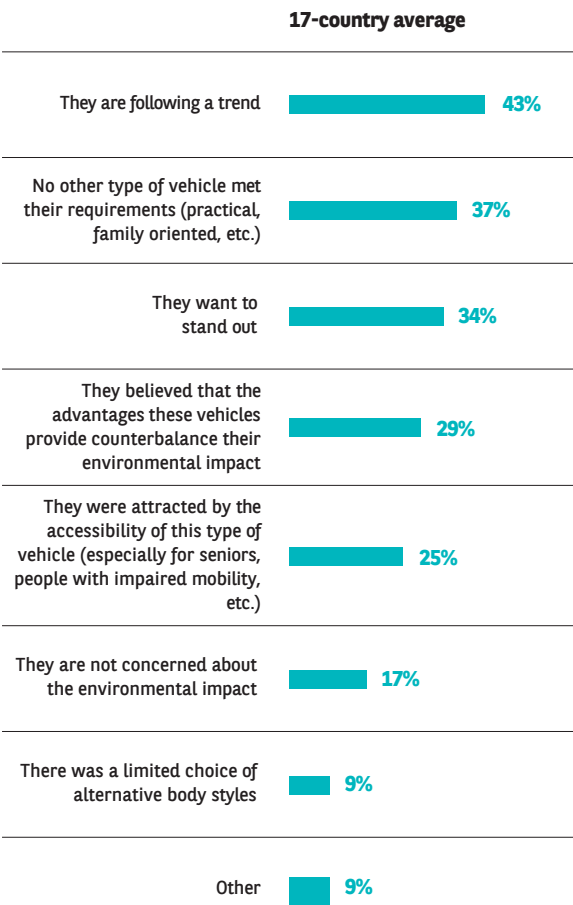
However, sitting between these two criticisms is the idea that SUV owners appreciate the practicality of this type of car and that it meets the needs of families (37%).

The fourth reason for buying an SUV in the eyes of those who do not own one? The advantages these vehicles provide, which counterbalance their environmental impact. 34% cite this criterion, including 1 in 2 South Africans.

Fig. 6

You do not own an SUV. In your opinion, why do people buy SUVs?

Three possible answers. Base: vehicle owners who stated that they do not have an SUV.



Source: L'Observatoire Cetelem de L'Automobile 2022.

A TARGET FOR WIDESPREAD CRITICISM

VEHICLES THAT ARE VIEWED AS POLLUTING, BUT NOT ALWAYS

One issue that seems to stick to SUVs like glue is that of pollution. And again on this topic, the differences between owners and non-owners of SUVs are marked. 36% of non-owners think that SUVs pollute more than any other type of vehicle, while only 23% of SUV owners concur with this suggestion (**Fig. 7**). And opinions become more polarised depending on where people live. At the front of the queue of those who criticise SUVs for their environmental impact are non-owners from Germany, the UK, the Netherlands and France, while those from emerging countries once again put forward a somewhat different opinion. SUV owners also express diverging points of view, although the same geographical divisions are not apparent. Dutch and South African SUV owners are the most critical (31%), while the Mexicans and Turks are the least likely to voice such an opinion (11% and 13%).

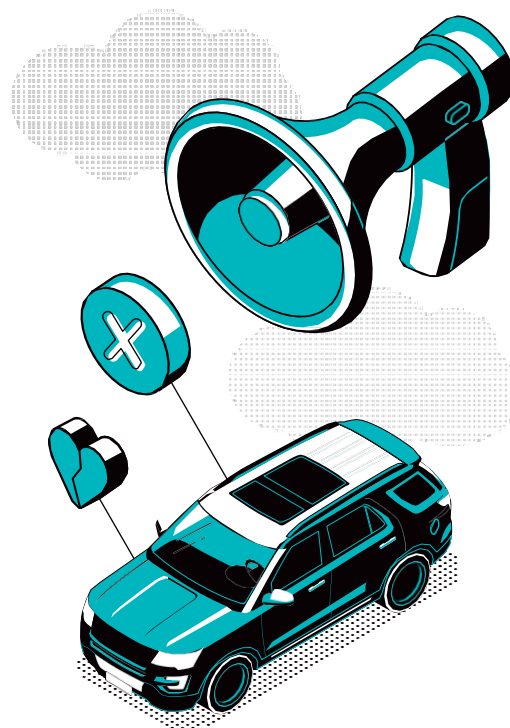
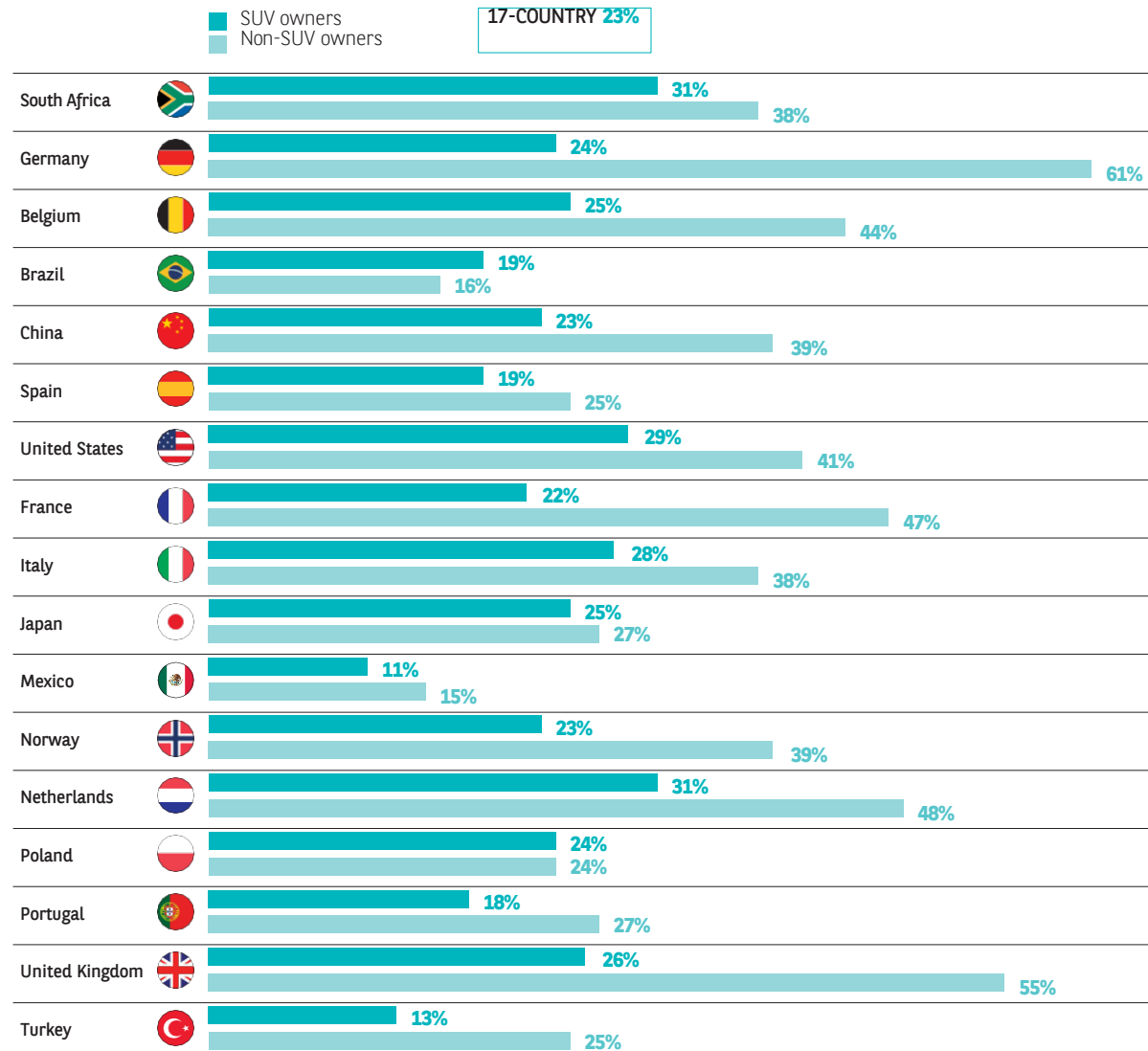


Fig. 7**Compared to other types of vehicle, do you think that SUVs pollute more, less or neither more nor less?**

Only one possible answer. Percentage who answered "more".



Source: L'Observatoire Cetelem de l'Automobile 2022.

A VEHICLE THAT ATTRACTS CRITICISM FROM SOCIETY

The environmental question is by far the thickest dividing line between the pro- and anti-SUV factions. Public debate around SUVs has generated constant and regular criticism of these vehicles. According to an October 2019 study by the International Energy Agency, SUVs have been the second largest contributor to the rise in global CO₂ emissions since 2010, behind electricity generation, but ahead of heavy industry, road transport and aviation. A study by the World Wildlife Fund (WWF) reached the same conclusion. However, this result must be qualified by considering the different types of SUV. The impact of American SUVs, which are heavier, larger, more powerful and even less aerodynamic than their European counterparts, is much greater. It is also important to note that the increase in SUV sales in some countries, including France, has gone hand in hand with a decline in sales of diesel vehicles. The increasing "electrification" of vehicle ranges and the stiffening of environmental regulations have contributed to positive trends in terms of energy usage.

But this is not the only issue that makes the topic of SUVs a source of discord. Their height and overall size often cause problems in towns, where their presence continues to grow. Road lanes and car parks are sometimes too small for SUVs to be able to use them without difficulty.

Another cause for criticism is the increased risk of accidents. An AXA study conducted in Switzerland



in August 2020 revealed that the larger an SUV, the higher the risk of it being involved in an accident. In the United States, the Governors Highway Safety Association pointed out in 2018 that the significant rise in the number of light trucks in circulation was causing an increase in the number of pedestrians killed in road accidents.

Fig. 8 / Context

Change in global CO₂ emissions by sector, 2010-2018

The global rise of SUVs is challenging efforts to reduce emissions - World Energy Outlook 2019

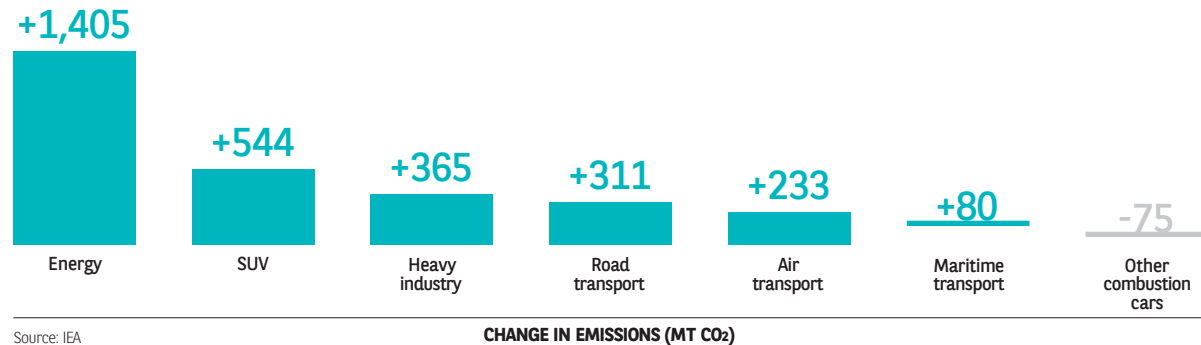
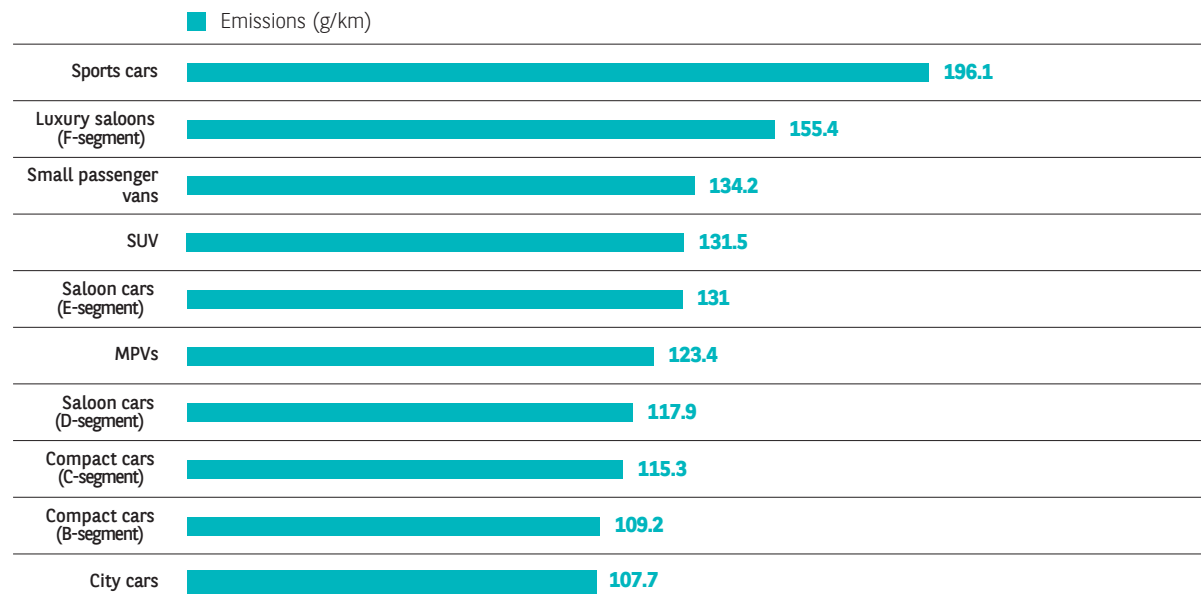


Fig. 9 / Context

Average CO₂ emissions by segment, in Europe in 2019



KEY FIGURES

45%

of those who believe they have an SUV are mistaken about the type of vehicle they own, compared with just 5% of those who do not

8/10

SUV owners appreciate the value for money they offer

6/10

SUV owners, outside of Europe, drive their cars primarily in town and in urban areas

1/2

SUV owners believe that criticism of these vehicles is justified, compared with 2 out of 3 non-owners

23%

of SUV owners believe they pollute more than other vehicles, compared with 36% of non-owners

4/10

non-SUV owners believe that those who buy them are just following a trend





2

SUVS: A STUNNING SUCCESS STORY

SUVs divide opinion like no other type of vehicle in history. They generate clear and vocal opposition and prompt heated debate. So how can one explain their incredible level of success, one that has made them the passenger vehicle market's leading segment? This global success has been replicated in all 17 countries covered by this survey and, more broadly, in every nation in which cars are sold. Indeed, SUVs hold great appeal and offer various advantages that draw in an ever increasing number of motorists, but also passengers. Nobody could have predicted the degree of popularity enjoyed by SUVs and their future seems just as bright, especially if we consider the magic dust that electricity is set to sprinkle onto them over the coming years.

A STANDARD BEARER FOR THE MARKET

GLOBAL DOMINATION

That is the dream of all manufacturers. To see their product stamp its mark across the world, with breathtaking speed, and exceed any expectations they may have had, however unreasonable. The SUV is one of those dreams and it has come true in a relatively short space of time, establishing itself as the leading segment in the automotive market.

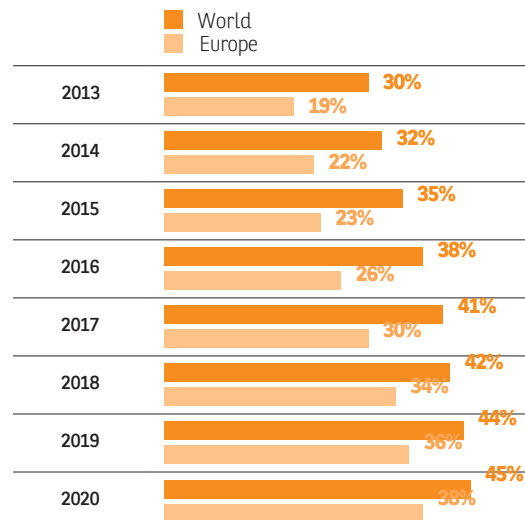
Today, the category accounts for 45% of global sales and 38% of sales in the European Union. In the latter, its market share has increased almost twofold since 2013 (**Fig. 10**). Worldwide, its growth over the same period has been less blistering, but still stands at an impressive 50%.

Right at the top of the tree is the USA, a country we tend to associate with big cars and wide open spaces. SUVs account for just over half of all car sales in the States (52%) and the segment has grown 50% in less than a decade. With SUVs securing a market share of 48%, China is the second ranked country of L'Observatoire Cetelem de l'Automobile 2022. Thus, close to 1 in 2 Chinese motorists now drive this type of vehicle. Portugal,

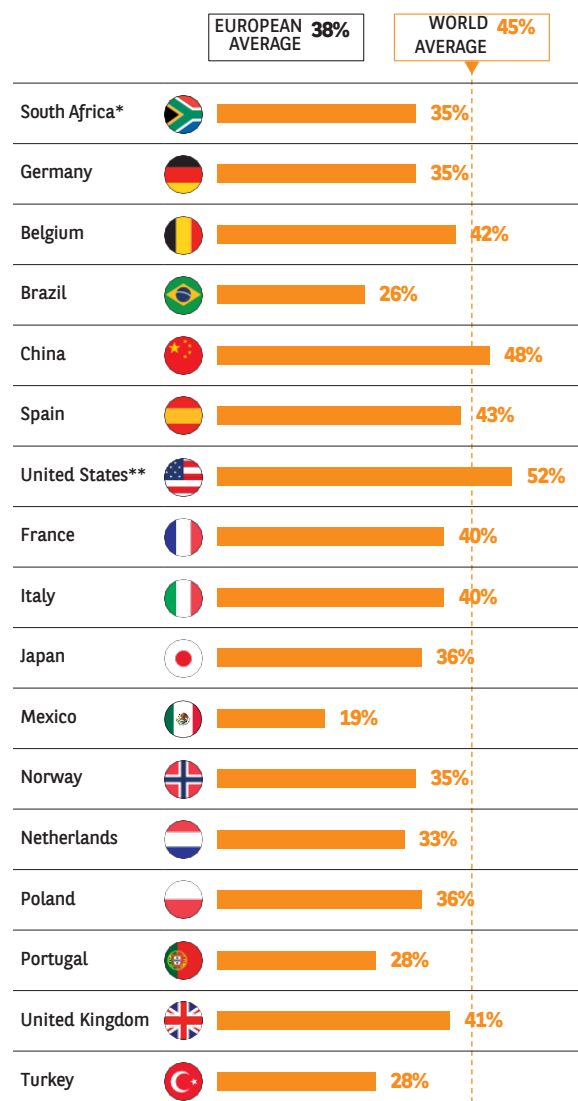
Turkey, Brazil and Mexico sit at the bottom of the ranking (28%, 28%, 26% and 19%). In France, meanwhile, the market share of SUVs is just above the European average, at 40%, a similar figure to most of the other countries surveyed (**Fig. 11**).

Fig. 10 / Context

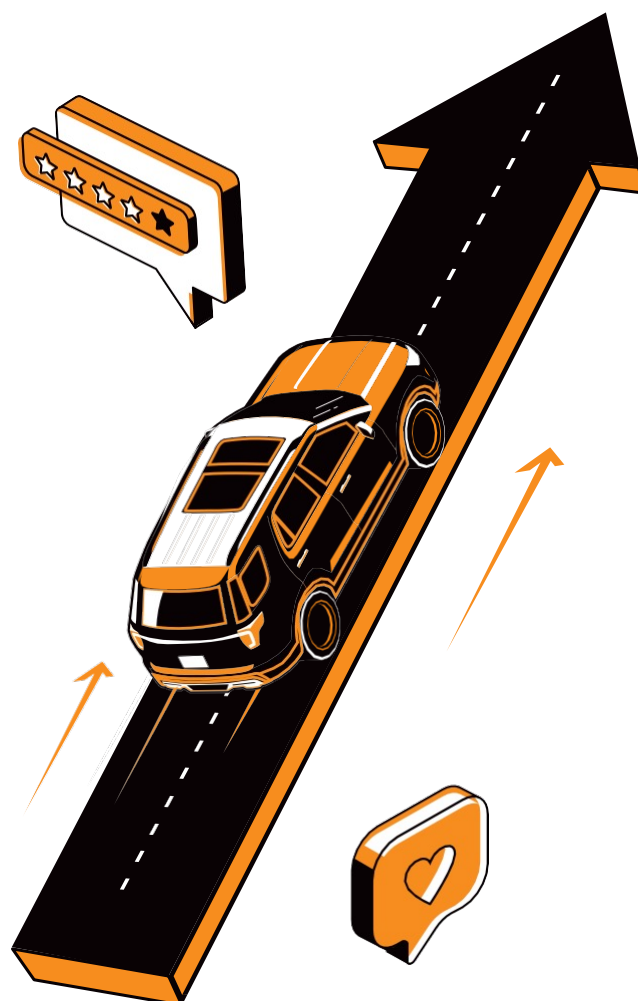
Change in the market share of SUVs in terms of new passenger vehicle (NPV) sales



Source: C-Ways, according to industry bodies and national statistical institutes.

Fig. 11 / Context**Market share of SUVs in terms of new passenger vehicle sales in 2020**

Source: C-Ways, according to industry bodies and national statistical institutes.



* 2020 unconsolidated market share.

** In the United States, the NPV market includes pick-up trucks.

AN SUV FOR EVERY BUDGET

Even without gathering the opinion of motorists on the reasons for this incredible popularity, one explanation is obvious. Over time, SUVs have become available at as wide a range of prices as that of saloon cars. So we now have both budget and luxury SUVs, something that was not necessarily to be expected given the nature of these vehicles. Often thought of as imposing and bulky, SUVs are now available in all sizes and above all, as we have just highlighted, at every price point. While you might pay €14,000 for a Dacia Duster or a Ssangyong Tivoli, a Rolls Royce Cullinan will set you back €340,000, a 25:1 price ratio (**Fig. 12**). However, it should be stated that most models sell for between €30,000 and €40,000. By way of an example, the sales-weighted median price in France is €32,500.

THE BRANDS ASSOCIATED WITH SUVs

The fact that SUVs are available at such a wide range of prices also stems from one of the key factors in their success: almost every carmaker has entered the segment.

In the minds of many of those interviewed for this 2022 edition of L'Observatoire Cetelem de l'Automobile, SUVs are still associated with the Jeep brand. Indeed, the company is at the top of the list in 1 in 2 countries. However, this is not the case in the US, the home of Jeep, where it has been overtaken by Ford. And yet, in terms of global sales, the Jeep Compass is ranked "only" 16th.

Another brand that scores highly when it comes to recognition is BMW. With three top spots and

eight second-place rankings, the German brand's three-letter moniker is closely associated with the three letters "SUV". This is hardly surprising, given that BMW's range of saloon cars is mirrored in its various X-class SUVs.

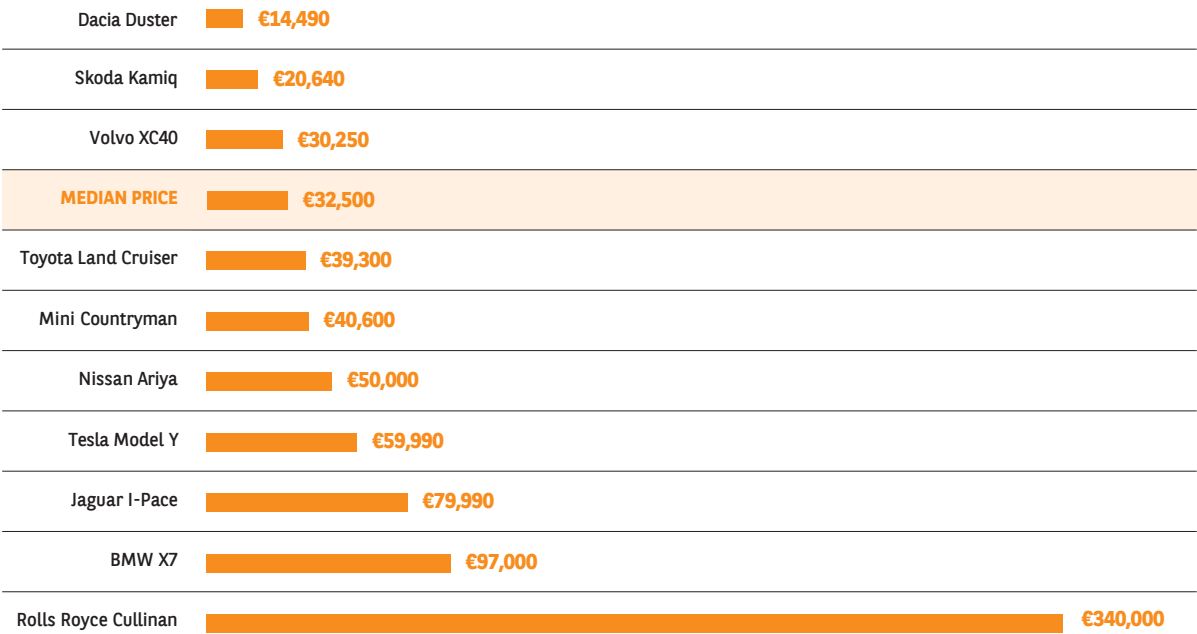
Toyota completes the podium of brands that best embody the SUV category, with two first-place and numerous third-place spots. This is a result that defies logic, since the Toyota Rav 4 was the top selling SUV in the world in 2019, with 950,000 vehicles sold (source: IHS) (**Fig. 13**), placing it 4th in the ranking of passenger vehicle sales. Since its launch in 1994, more than 10 million units of the Rav 4 have been sold.

Further down the list, a wide array of brands are associated with the SUV category. This diversity is reflected in the sales figures, with eight different brands occupying the top eight positions.

When it comes to annual global sales, Japanese and Korean carmakers lead the way, with only the Volkswagen Tiguan and the Chevrolet Equinox getting a look-in, securing third and eighth place, respectively. Volkswagen also enjoys a strong presence in Europe, with its Tiguan again ranking highly in second place, while its T-Roc comes third in terms of annual sales (**Fig. 14**). The Renault Captur stands in the way of German domination by securing the top spot, if only narrowly, with 179,000 units sold.

Fig. 12 / Context

List price of SUVs sold in France in 2021



Source: C-Ways, according to manufacturer websites.

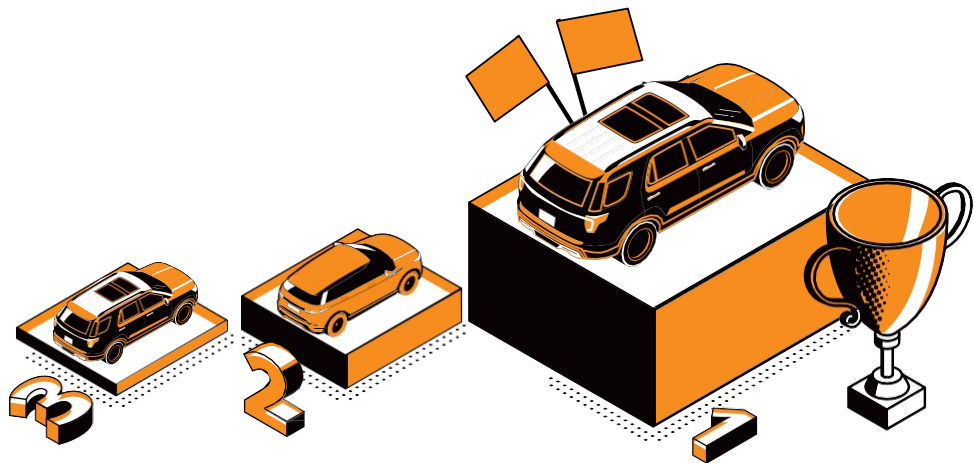
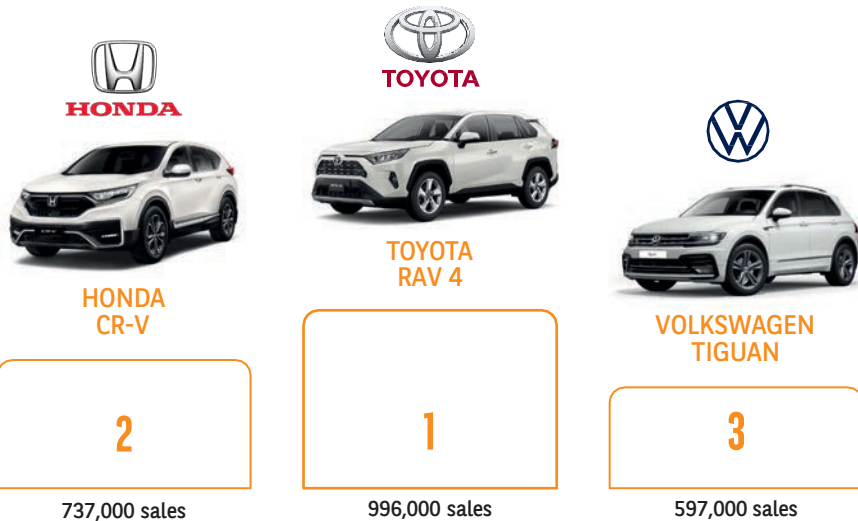


Fig. 13 / Context

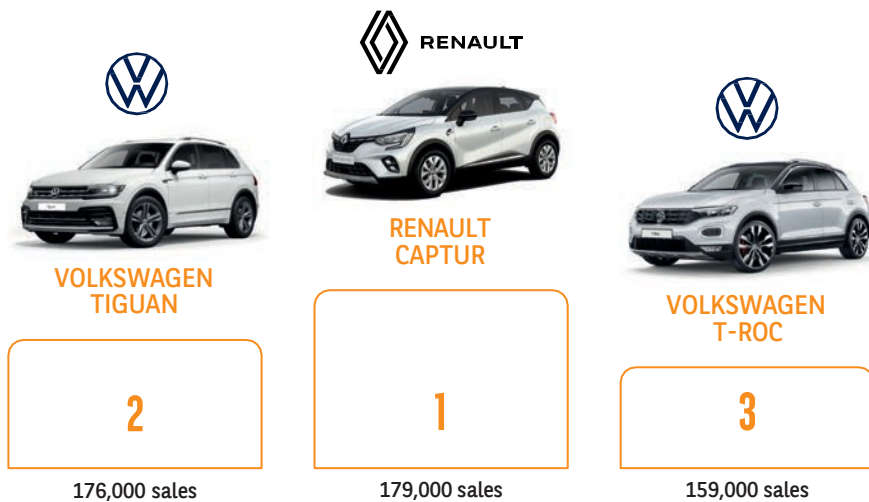
Top 3 best-selling SUVs worldwide in 2020



Source: Statista.

Fig. 14 / Context

Top 3 best-selling SUVs in Europe in 2020



Source: Statista.

WIDE RANGING APPEAL

A CONCEPT THAT IS CLEARLY IDENTIFIED

Although, as we have pointed out, the term SUV and its definition are based on a somewhat ambiguous identity, with boundaries that shift from one country to the next and according to whether or not one owns such a vehicle, people seem to have a clear perception of the concept.

Motorists highlight two “physical” criteria that characterise the specific design of SUVs. 34% mention a spacious passenger compartment **(Fig. 15)**. Close to 1 in 2 respondents in China, the US, South Africa, Brazil and Portugal cite this feature. This is a view that the Norwegians, Japanese, Germans, Belgians and Poles are much less likely to share.

The second characteristic that motorists believe distinguishes SUVs is the vehicle's raised body (32%). The Italians and Germans, together with the South Africans and Turks, are the most likely to cite this feature, while the Poles and Mexicans in particular pay little attention to it (just 7% and 14%).

In third place is the feeling of safety that motorists feel SUVs procure, with a similar proportion voicing this opinion (31%). Once again, this result seems to be influenced by the way this type of vehicle is designed, i.e., its silhouette is generally bulkier than that of a traditional saloon car. Indeed, it is no coincidence that the raised stance of these vehicles, which is often synonymous with safer driving, achieves an almost identical score. The Mexicans are the most likely to mention this feeling of safety, while around half as many Brits are convinced about this attribute.

The remaining criteria are put forward by less than a quarter of respondents. It is interesting to note that 4-wheel drive comes fourth in the ranking, despite the fact that it is a rare feature on today's SUVs.

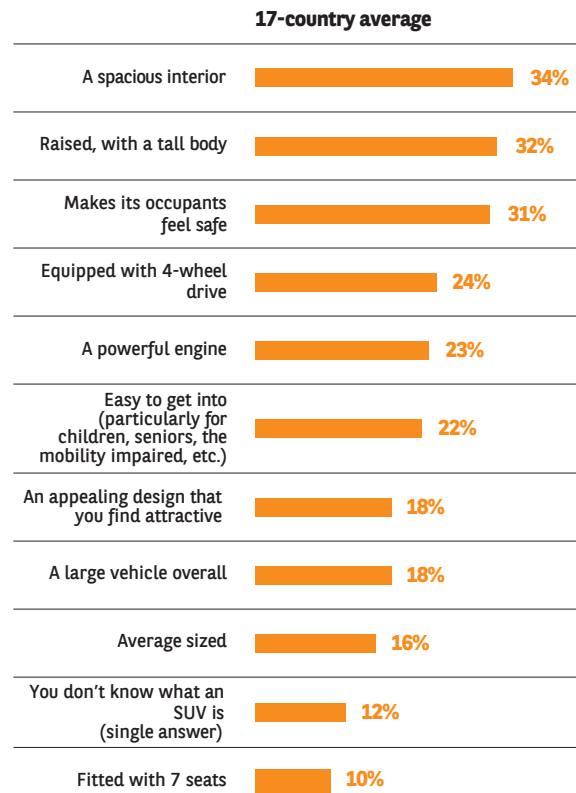
A VEHICLE WITH SOLID VALUES...

It makes sense that the technical features people mention when they identify SUVs translate into corresponding “values”, with the top five being particularly prominent.

Fig. 15

Based on your own understanding, what attributes best characterise an SUV?

Three possible answers.



Source: L'Observatoire Cetelem de L'Automobile 2022.

In these Covid times, which have resulted in lengthy lockdowns and individuals withdrawing into their family unit, fuelled by a strong desire to protect their loved ones, it is probably no coincidence to see two values stand out from the rest.

In the eyes of motorists, SUVs are family vehicles first and foremost (28%). The South Africans, Portuguese and Mexicans are the most likely to make this point, with the Japanese and, perhaps more surprisingly, the Turks finding themselves at the other end of the scale. We say surprisingly because although in Japan the birth rate is very low and the family-friendliness of a vehicle is therefore less important, Turkey's birth rate is significantly higher (1.36 and 2.38 children per woman in 2019, respectively – Source: World Bank).

The third most cited value among motorists is safety (26%), an attribute that is clearly associated with SUVs to a relatively similar degree in all countries (**Fig. 16**). However, the Turks, Italians and Americans are the most mindful of this factor, while the Japanese, once again, and the Poles place less importance on the issue.

In between the two, the off-road capabilities of SUVs are singled out by 27% of respondents. In this instance, the disparities are much more marked. For example, three times as many Italians as Americans refer to this point. This is a result that challenges the cliché of the United States being a nation where people are always travelling across vast open spaces with no shortage of obstacles to clear.

Rounding out the quintet of values that motorists most commonly associate with SUVs, power and comfort achieve scores of 24% and 23%, respectively. The Dutch and Germans are the most inclined to mention power, while the

opposite is true of the French and Portuguese. The comfort factor is most frequently cited by the “distant cousins” of Brazil and Portugal, while the Norwegians and Japanese show little concern for this attribute. It is worth noting that SUVs are rarely viewed as being fuel efficient (7%) (**Fig. 17**).

... BUT WHICH DOES NOT EQUATE TO THE IDEAL CAR

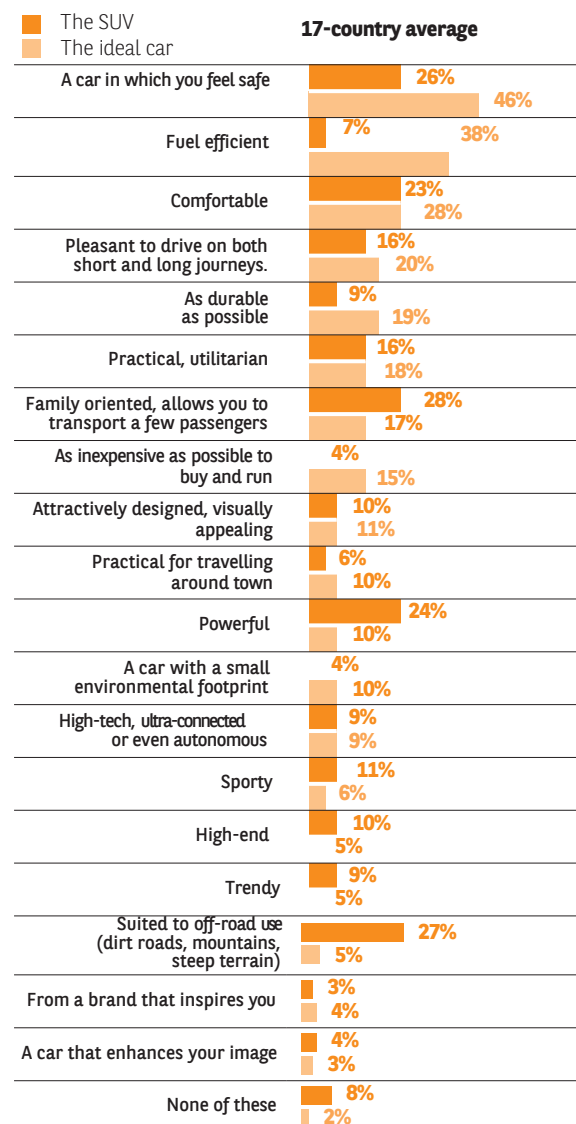
In the minds of motorists, the aforementioned fuel efficiency criterion is one of those that does the most to differentiate the SUV from the ideal car. 38% view it as a priority and it is preceded only by safety. This ideal of a fuel-efficient car is expressed by almost 1 in 2 people in Portugal, Poland, Brazil and South Africa, compared with only a quarter of Chinese and American respondents. The ideal of a car that makes one feel safe is more universal, although its importance appears to be greater in Spain, Italy and Brazil, but less so in France.

However, most striking are the disparities that appear when numerous other criteria are examined. Indeed, SUVs are family cars in the opinion of 28% of those surveyed, while only 17% believe the same can be said of the ideal vehicle. And this is also true of certain other criteria: while 24% consider SUVs to be powerful vehicles, only 10% think that the ideal vehicle is also powerful. Conversely, 15% believe that the ideal car would cost as little as possible to buy and use, while just 4% think that SUVs meet these criteria. Only three items generate practically identical scores on both sides, three of which relate to style and design.

Fig. 16

What is your perception of...

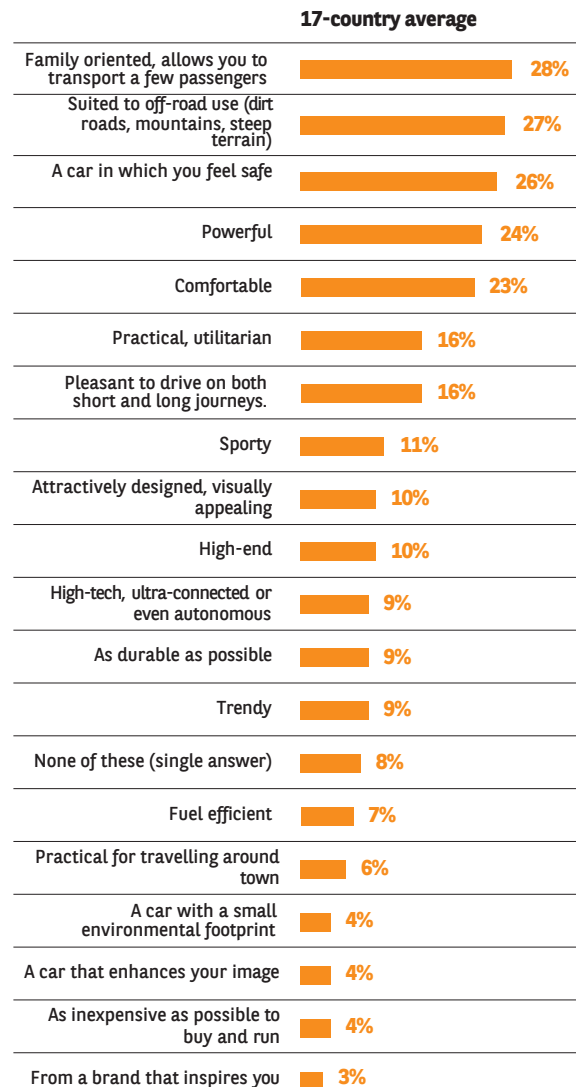
Three possible answers.



Source: L'Observatoire Cetelem de l'Automobile 2022.

Fig. 17**Do you consider SUVs to be...**

Three possible answers.



Source: L'Observatoire Cetelem de l'Automobile 2022.

CHARACTERISTICS AND USES: A GOOD LEVEL OF CONSISTENCY

The way in which SUV owners use their vehicle tends to be consistent with the image they have of this type of vehicle: a family car that offers peace of mind when it comes to safety. 68% of them use their car mainly to go on holiday or for weekends away, 7 points more than non-SUV owners (**Fig. 18**). On this topic, the results again differ significantly from country to country. Turkey, Poland, Italy and Spain are the countries in which SUV owners are the most inclined to use their car to go on holiday, while the Norwegians, Dutch, Chinese, British and Germans are much less likely to use them for leisure purposes and holiday travel. It is interesting to note the marked differences that appear between owners and non-owners of SUVs in Japan and the Netherlands, differences that are practically non-existent in Norway and China.

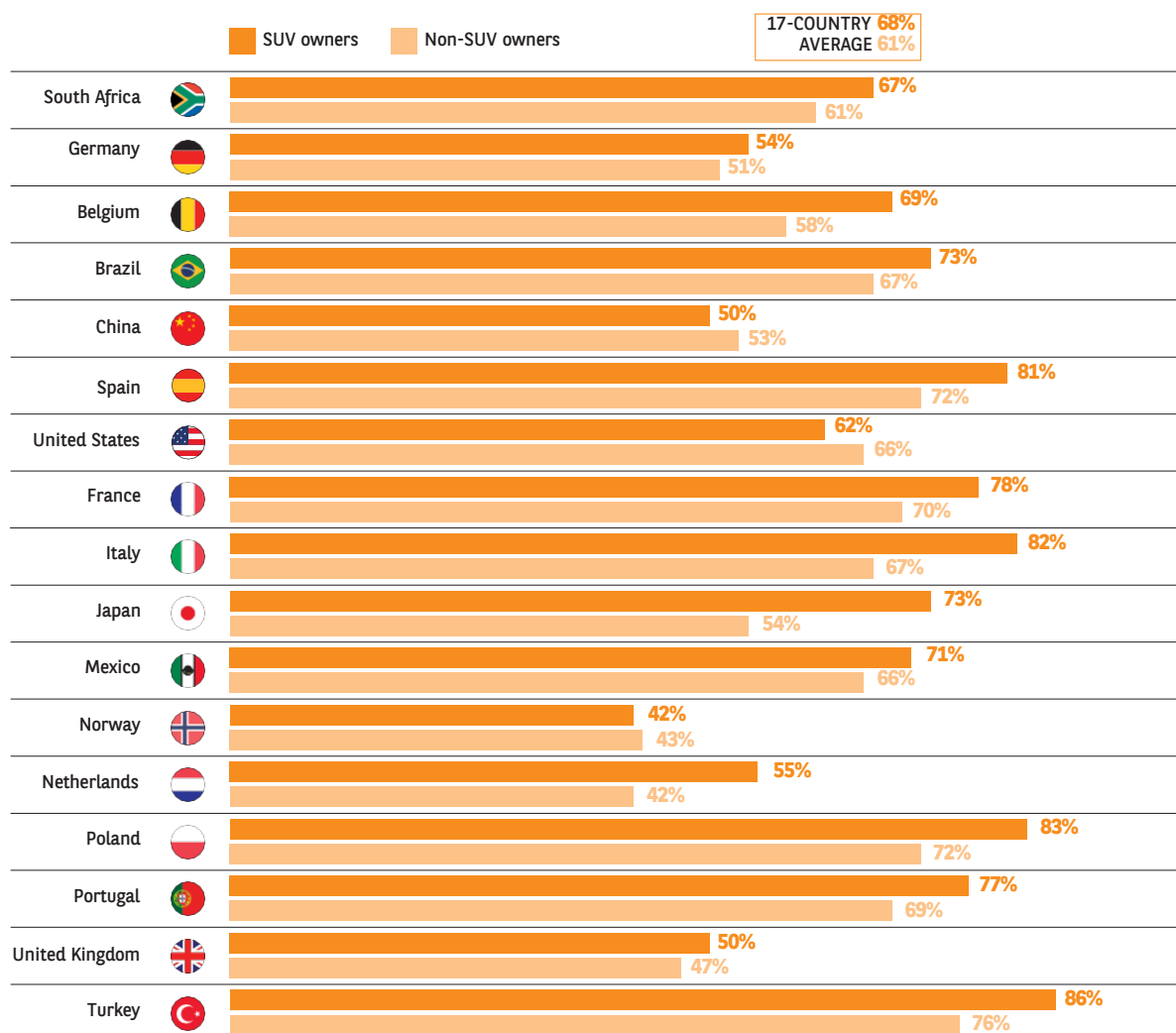
SUVS GO THE DISTANCE

Not only do SUVs spend more time on the road during the holidays, they tend to cover more distance in general. Every year, SUV owners drive an average of 15,251 km compared with just 13,506 km in the case of non-owners (**Fig. 19**). And in all countries, those who drive the most are SUV owners. In Italy and Spain, the gap between the two categories of motorist exceeds 3,000 km per year, while in the Netherlands, South Africa, China and Brazil the difference is less than 1,000 km. The interior space, comfort and safety offered by SUVs seem to encourage their owners to cover greater distances.

Fig. 18**How often do you use your car for occasional trips, such as weekends away or holidays?**

Only one possible answer. Percentage who answered "often" or "always".

Base: owners of a vehicle.

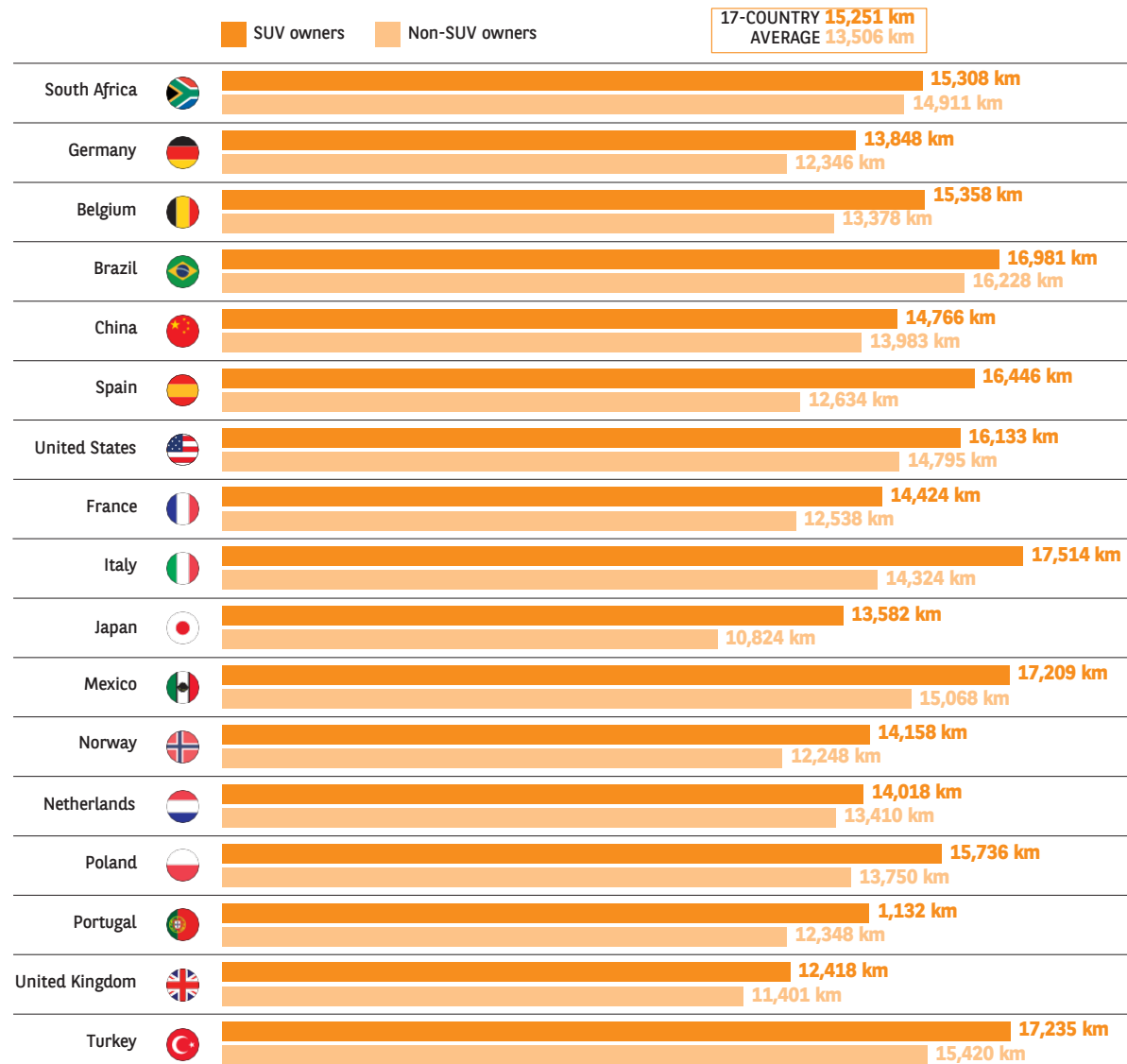


Source: L'Observatoire Cetelem de l'Automobile 2022.

Fig. 19

How many kilometres do you estimate that you cover in your vehicle per year?

Only one possible answer. Base: owners of a vehicle.



Source: L'Observatoire Cetelem de l'Automobile 2022.

THE ELECTRIC OPTION RELIEVES SOME TENSIONS

CONSUMPTION ALERT

As we have already seen, SUVs are not considered fuel-efficient. However, fuel consumption is a topic of concern even for SUV owners, at a time when petrol and diesel prices are soaring. 34% of owners cite fuel consumption as the main factor that caused them to hesitate before buying an SUV, a sentiment expressed most strongly by the over-55s (**Fig. 20**). This is a particularly delicate subject in the emerging countries, but also in Italy and Spain. Respondents in the Netherlands, the United Kingdom, Japan and Norway, where the electric car is king, are less troubled by this issue. However, this concern appears to be grounded primarily in financial, rather than environmental interests. Only 23% of SUV owners were hesitant to buy such a vehicle because of its potential environmental impact.

THE MAGIC OF ELECTRICITY HELPS THE SUV'S CAUSE

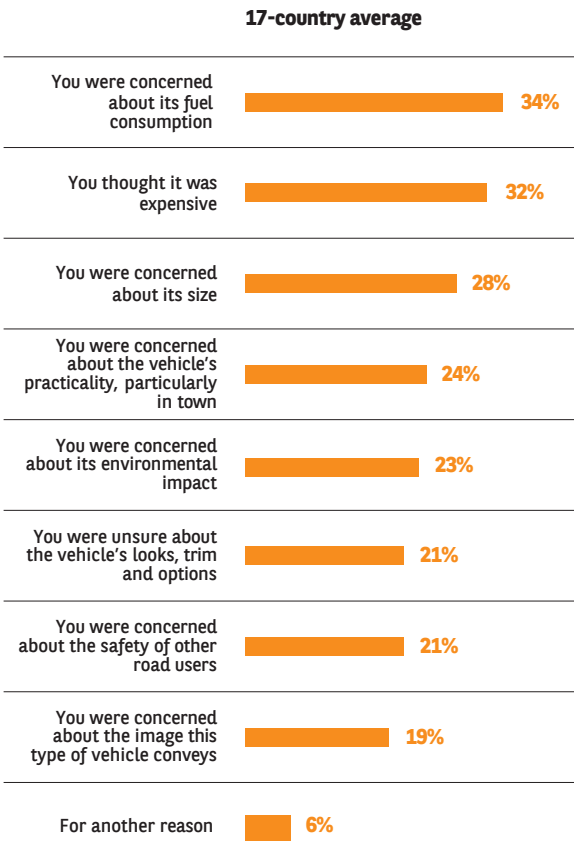
But if there has to be an environmental impact, motorists are clear on how to reduce it. 77% believe that producing electric or hybrid SUVs would help achieve this goal. In the emerging nations, as well as in Poland, this is a solution that prompts even more enthusiasm, with close to 90% voicing this opinion in some countries and an even greater proportion in others. Conversely, the response in countries such as Belgium, France and Germany is a little more ambivalent, with less than 60% favouring this approach (**Fig. 21**). Interestingly, in previous editions of L'Observatoire Cetelem de l'Automobile we had already seen these three countries clustered together when it came to environmental issues. This clustering stems from their maturity regarding this topic and their awareness that environmental impact is not linked purely to energy consumption.

Fig. 20

What factors caused you to hesitate before choosing between the SUV you purchased and another type of vehicle?

Three possible answers.

Base: vehicle owners who stated that they have an SUV, but had hesitated before buying the vehicle.



Source: L'Observatoire Cetelem de l'Automobile 2022.

ELECTRIC SUVs - COMBUSTION ENGINE CITY CARS: 1-0

Electrical power again demonstrates its superior environmental credentials when electric SUVs are pitched against combustion engine city cars. This is something of a mismatch, with the former receiving an average of 71% of the vote and the latter 29% (**Fig. 22**). Here, the geographical divide revealed earlier reappears, with respondents in the emerging nations wholeheartedly supporting electric SUVs and the aforementioned trio, along with Norway, remaining more sceptical. Germany is the only country in which combustion engine city cars prevail over electric SUVs, while France is just 1 point away from producing the same result. The Iberian peninsula also stands apart, with Spain and Portugal producing scores similar to those of the emerging nations.

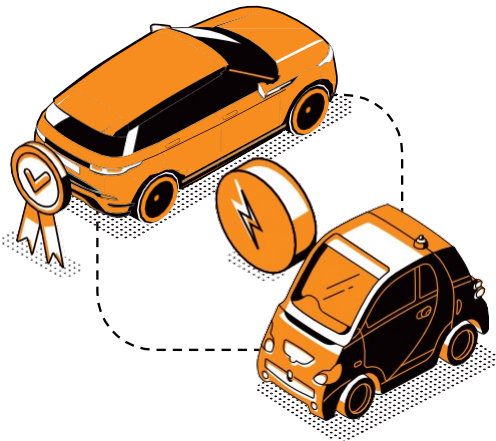
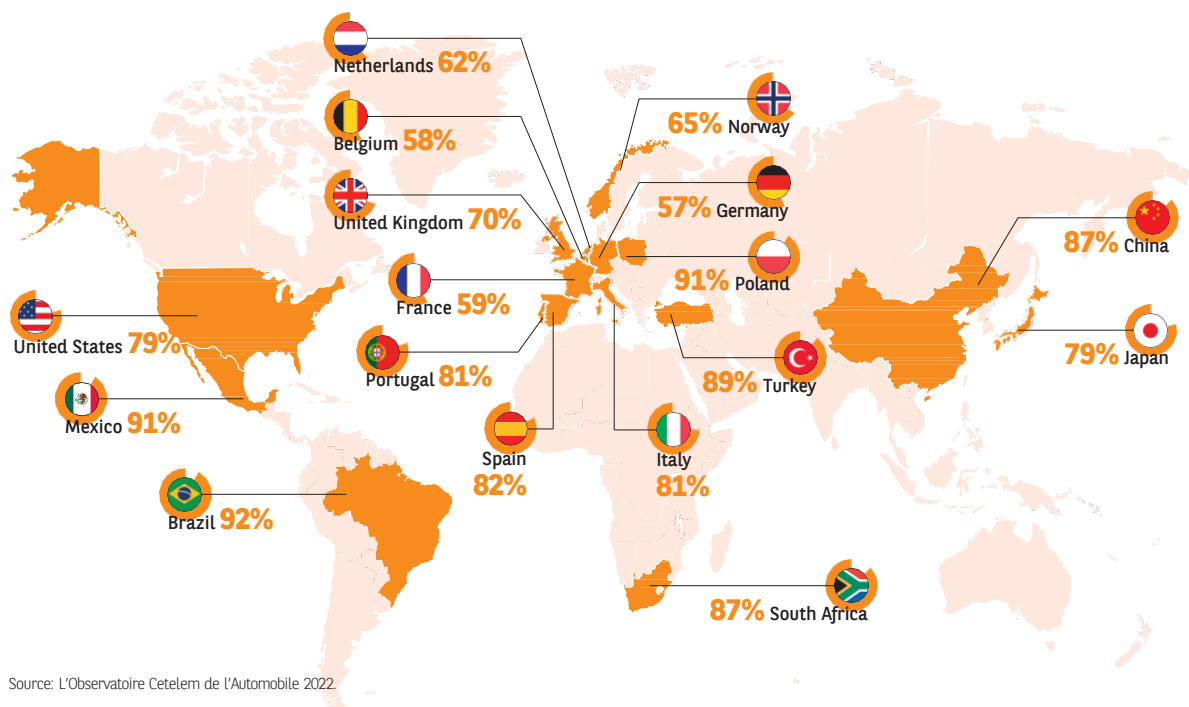


Fig. 21**Do you believe that producing electric or hybrid SUVs reduces their environmental impact?**

Only one possible answer. Percentage who answered "yes, somewhat" or "yes, absolutely".



Source: L'Observatoire Cetelem de l'Automobile 2022.

THE RESPONSE FROM MANUFACTURERS ALIGNS WITH EXPECTATIONS

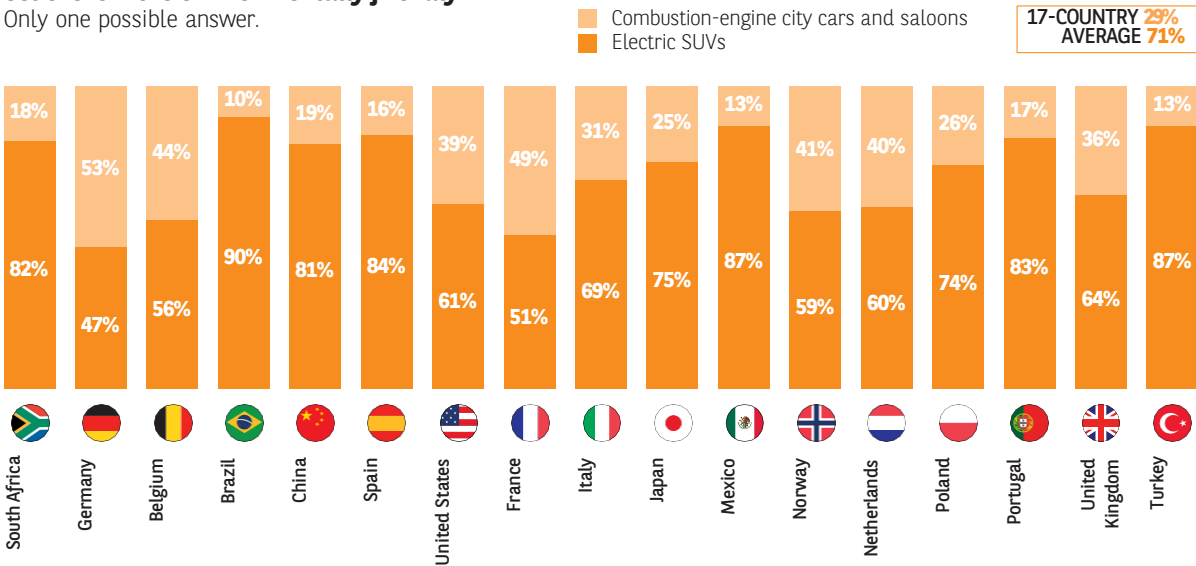
The growing interest expressed by motorists towards electric vehicles also prompts them to hold a rather favourable view of carmakers' efforts to offer more hybrid or electric cars. According to 83% of those surveyed, this shows that manufacturers are keen to prepare for the future. That means anticipating future traffic restrictions in cities, carbon neutrality targets and the gradual phasing out of combustion vehicles.

Once again, with the exception of Spain, Italy and Poland, the Western countries are slightly less likely to be of this belief.

An almost identical percentage of motorists (82%) believe that manufacturers are relying on these types of vehicle to meet the increasingly stringent environmental targets set for them (**Fig. 23**). On this topic, the answers of the different countries are more homogeneous than for the previous item.

While 78% are also of the opinion that manufacturers are catering for the expectations of motorists, this relatively positive consensus is clouded by two counterpoints. 79% are of the belief that carmakers are using these vehicles as an excuse to raise prices and 76% believe that they are a way of easing their conscience. Here, the traditional geographical dichotomy collapses, giving way to clusters we have not seen before. The Brazilians, the French and the Poles are united in denouncing what they perceive as greed on the part of manufacturers. Meanwhile, the Japanese and Chinese are more charitable in their attitudes. The French, together with the Spanish, Turks, Brazilians, Poles and Japanese, are the most likely to condemn

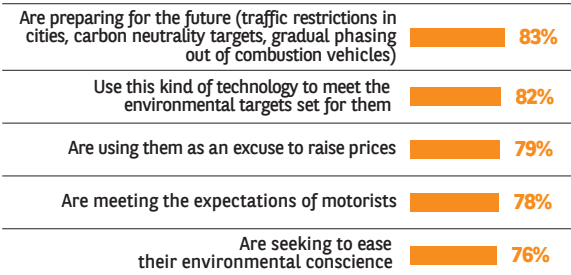
Fig. 22
Which of the following two types of vehicle do you believe is more environmentally friendly?
Only one possible answer.



Source: L'Observatoire Cetelem de l'Automobile 2022.

manufacturers for cynically seeking to ease their conscience. The Norwegians, Dutch and Portuguese, on the other hand, are less suspicious in this regard.

Fig. 23
Do you believe that by offering hybrid or electric SUVs, carmakers...
Only one possible answer per item. Percentage who answered "yes, somewhat" or "yes, absolutely".
17-country average



Source: L'Observatoire Cetelem de l'Automobile 2022.

THE SUV GOES ELECTRIC

While the automotive market has been enriched by “pure electric players” that have designed and launched their own SUVs, the next three years will see many vehicles of this type from other carmakers receive the fully electric treatment.

Fig. 24 / Context

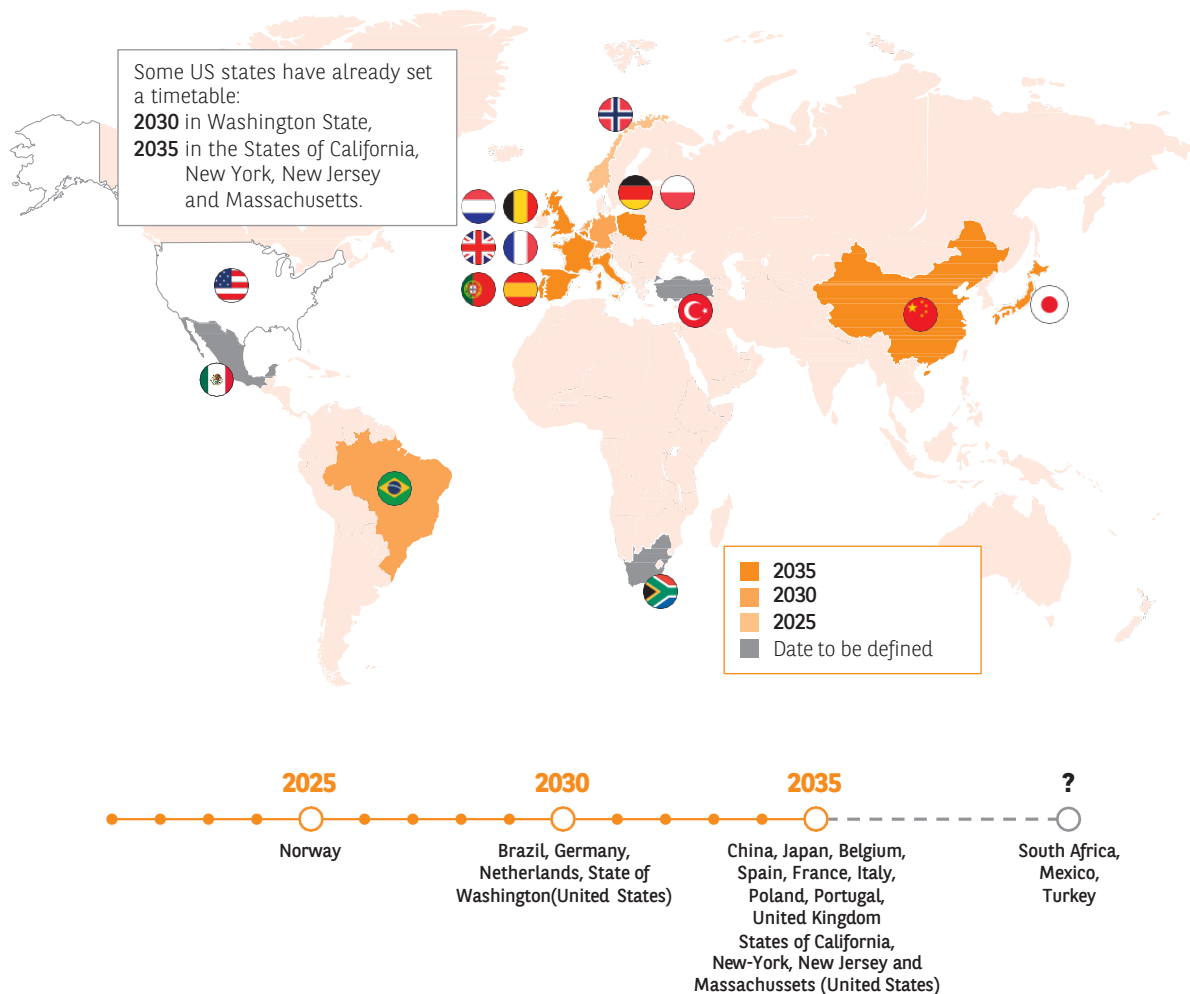
Availability of an electric version of the SUVs scheduled for launch between 2022 and 2024

	Available with a combustion engine or as a PHEV	Available as a fully electric vehicle	Launch year	Available with a combustion engine or as a PHEV	Available as a fully electric vehicle	Launch year
RENAULT Kadjar	●		2015	PEUGEOT 3008	●	2023
PEUGEOT 4008	●		2013	ALPINE SUV	●	2023
ALFA ROMEO Urban SUV (2008 platform)			2020	AUDI Q2 E-tron	●	2023
ALFA ROMEO Tonale	●		2020	AUDI Q5 E-tron	●	2023
BMW X8	●		2021	CUPRA TAVARA	●	2023
FORD EVOS			2022	DACIA DUSTER	●	2023
LEXUS LF-Z			2023	FIAT COMPASS SUV	●	2023
MERCEDES EQS SUV			2022	VOLVO XC1	●	2023
MITSUBISHI OUTLANDER	●		2023	HYUNDAI TUCSON	●	2024
PORSCHE MACAN-E			2022	RENAULT 4	●	2024
SKODA ENYAQ IV GT			2023	PEUGEOT E2008	●	2024
SMART SUV			2022	DS DS9 Crossback		2024
SUBARU SOLTERRA			2022	DACIA BIGSTER	●	2024
RENAULT Morphoz			2023	OPEL MONZA	●	2024

Source: C-Ways, according to manufacturer websites.

Fig. 25 / Context

Date on which the sale of new combustion engine and hybrid vehicles will be banned, by country



Source: C-Ways, based on government announcements.

TODAY'S SUCCESS IS SET TO CONTINUE

A COMPELLING OPTION FOR EVERYONE

The record sales achieved by SUVs make it hard to deny that these vehicles have been a runaway success. The results of L'Observatoire Cetelem de l'Automobile 2022 clearly support this point. SUVs hold great appeal and they have stamped their mark. Those who try them out tend to be won over. 6 out of 10 SUV owners state that they would choose an SUV again if they were to buy a vehicle within the next 12 months. SUV owners in the UK and the US, where SUV sales are the highest, as well as in Turkey and Brazil, are the most likely to make this choice (68%, 67%, 67% and 67%). Conversely, the Belgians and Poles are less enthusiastic, although a very slim majority would still pick this option (49% and 50%). The French post a score that is close to the overall average.

But most strikingly, almost a third of non-SUV owners would be prepared to opt for such a vehicle and, more importantly, they are more likely to do so than to buy a saloon car (19%) or a city car (18%) **(Fig. 26)**. In Brazil and South Africa, non-owners who intend to buy an SUV in the near future are actually

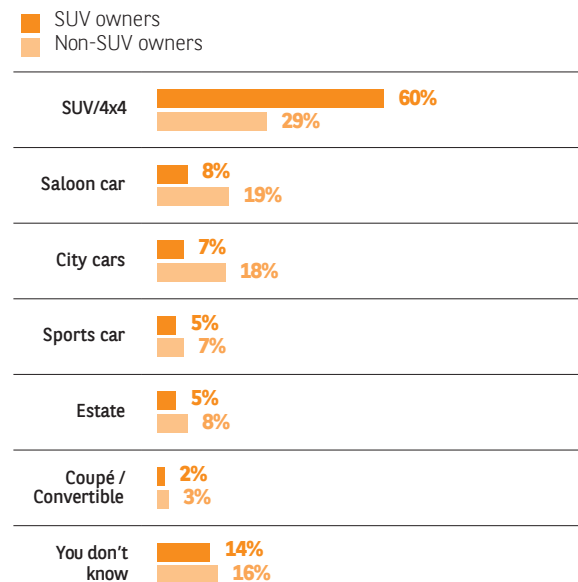
in the majority (52% and 51%). Those most resistant to this idea can be found in the Netherlands, Japan and the United Kingdom (12%, 15% and 15%). Non-SUV owners in France, Germany and Belgium are also rather dubious (19%) **(Fig. 27)**.



Fig. 26

If you were to purchase a car in the next 12 months, what type of vehicle would you buy?

Only one possible answer.



Source: L'Observatoire Cetelem de l'Automobile 2022.

A PREFERENCE FOR ELECTRICITY

The vast majority of those who will opt for an SUV in the future will go down the electric route. That is true for 66% of SUV owners and 61% of non-SUV owners (**Fig. 28**). On this environmentally-tinged question, the trio comprising Germany, France and Belgium appear to be much less excited about the prospect, with the French displaying the least fondness for the electric option. The level of enthusiasm among both populations of motorists is particularly high in Turkey, China and Brazil, but also Italy.

A GROUNDSWELL AGAINST RESTRICTIONS

Unsurprisingly, while the idea of sales restrictions is sometimes put forward as a way of ending the potentially negative impact of SUVs on the environment, motorists are opposed to such measures.

Only 30% of SUV-owners would be in favour, which is more or less the same proportion as those who would not buy one again. A peak of 52% can be observed in Poland, with SUV owners being even more supportive of such measures than non-owners) (**Fig. 29**). With 23%, Mexico posts the lowest score.

While 41% of non-owners do not agree with such restrictions either, the differences between the countries are much more pronounced in this instance. Indeed, the majority of non-SUV owners in the UK, France and Germany are in favour, posting figures more than twice as high as SUV owners in the UK and Germany.

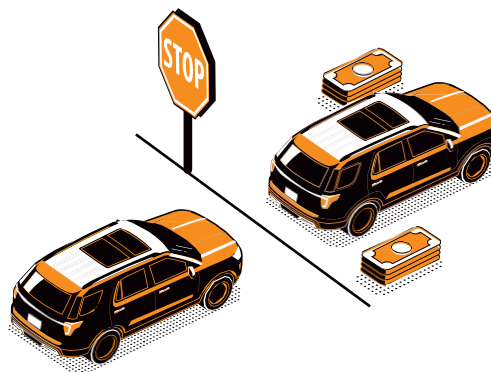
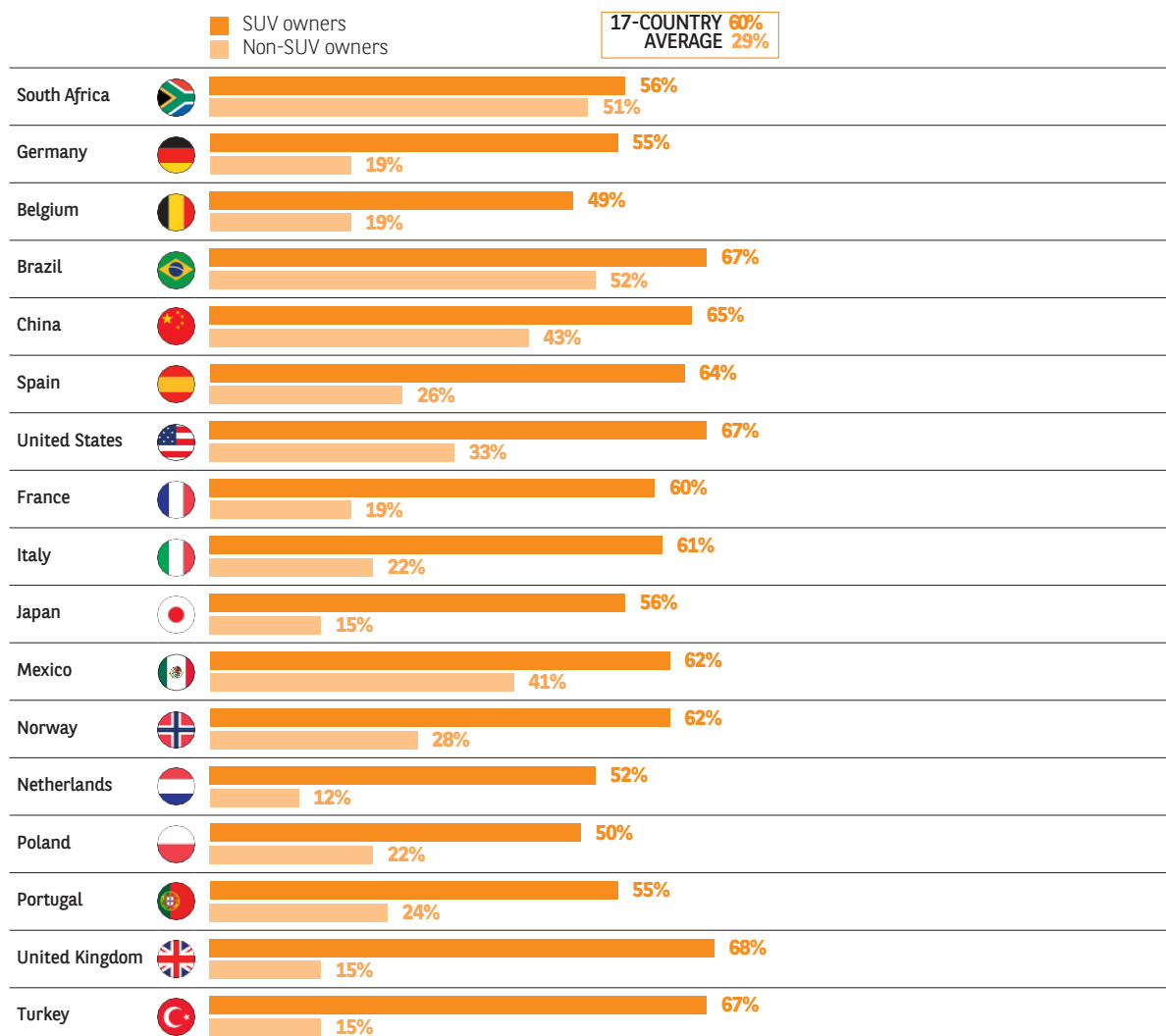


Fig. 27**If you were to purchase a car in the next 12 months, what type of vehicle would you buy?**

Only one possible answer. Percentage of respondents who selected "SUV" or "4x4".

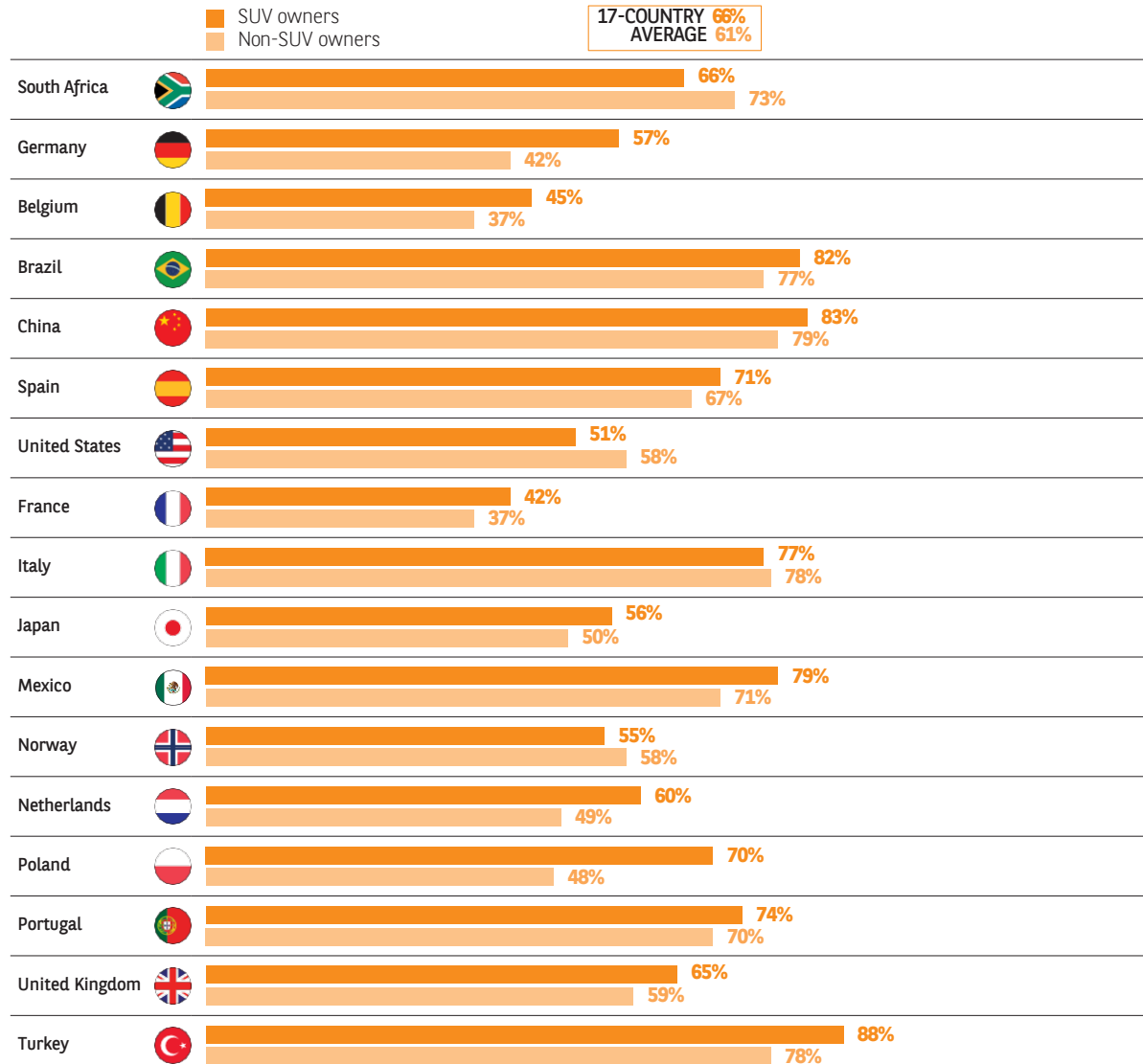
Base: owners of a vehicle.



Source: L'Observatoire Cetelem de l'Automobile 2022.

Fig. 28**Would you like to buy a hybrid or electric vehicle?**

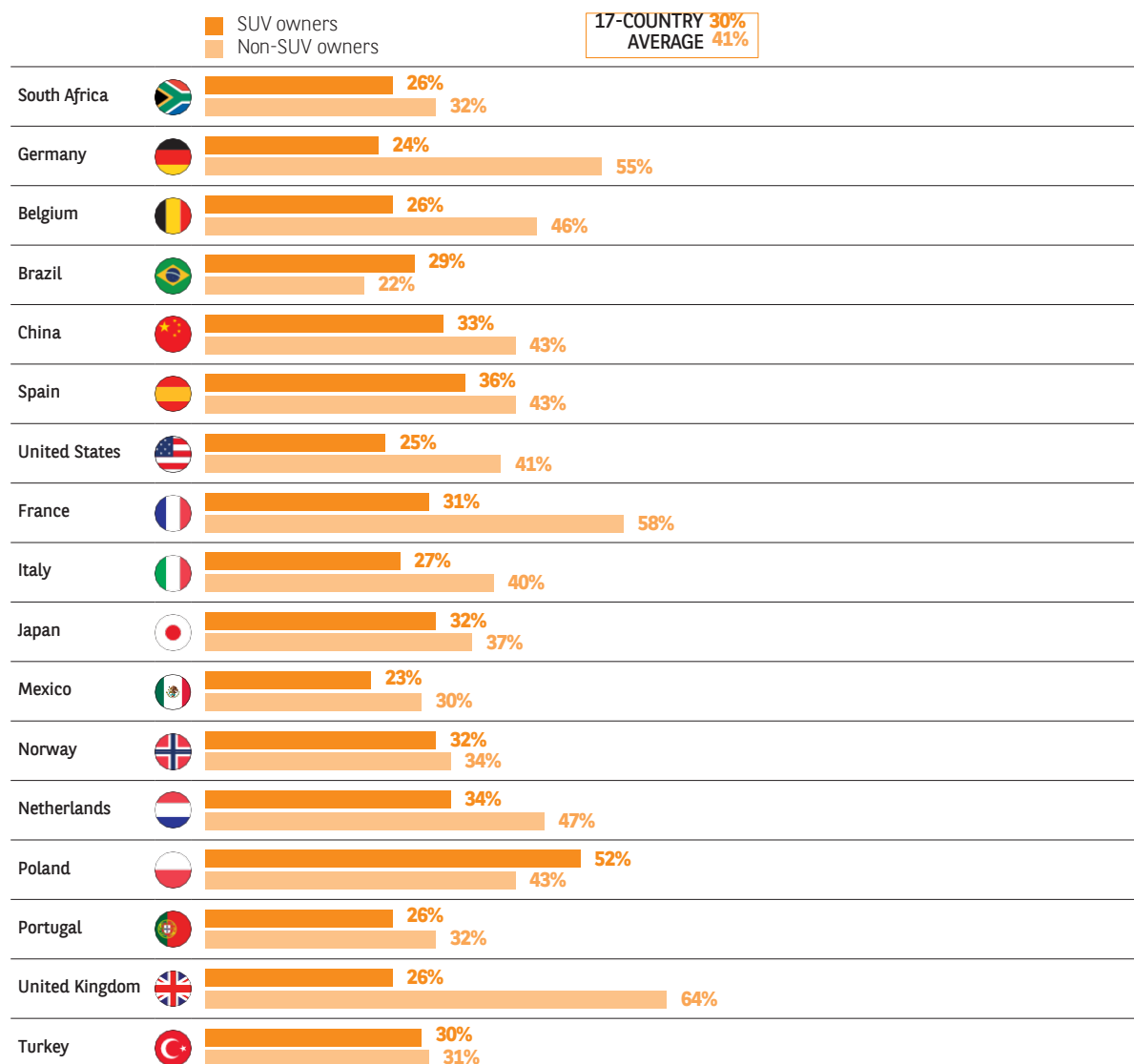
Only one possible answer. Percentage who answered "yes".



Source: L'Observatoire Cetelem de l'Automobile 2022.

Fig. 29**Do you think sales of SUVs should be restricted in the future?**

Only one possible answer. Percentage who answered "yes, somewhat" or "yes, absolutely".



Source: L'Observatoire Cetelem de l'Automobile 2022.

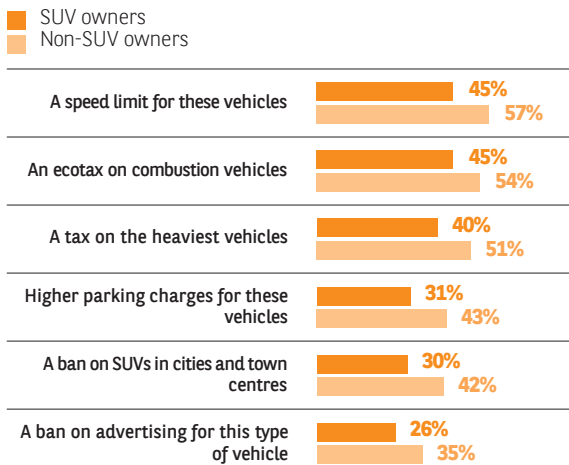
A MODERATE APPETITE FOR PENALTIES

When asked about measures less drastic than restricting the sale of SUVs, motorists are equally cautious. None of the items put forward for consideration attract the support of a majority of SUV owners. This is true for speed limits and ecotaxes on combustion engine SUVs (45%), as well as taxes on the heaviest vehicles (40%) (Fig. 30). It is even more true when it comes to increasing their price (31%), banning them from urban centres (30%) and banning their advertising (26%). With regard to the first three items mentioned, a slight majority of non-SUV owners support these measures. On all these issues, the Norwegians are alone in being consistently more tolerant than average.

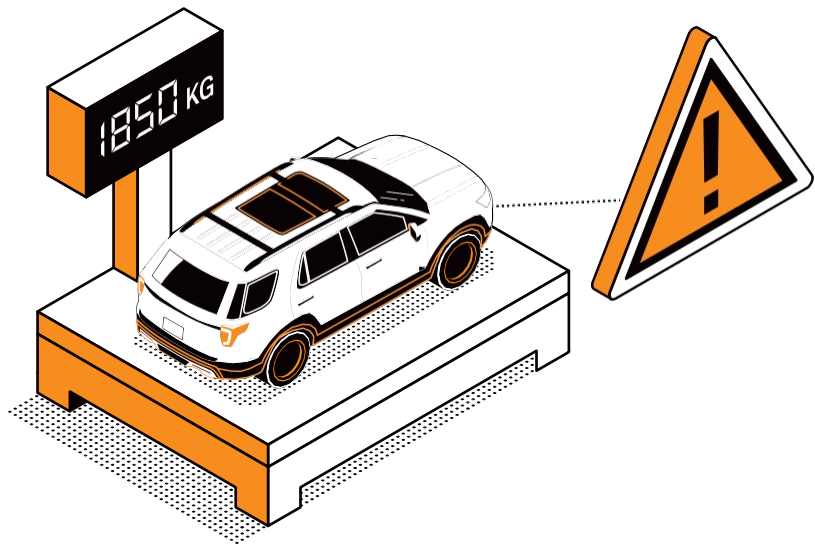
Fig. 30

Do you support or oppose each of the following measures with regard to SUVs?

Only one possible answer per item.
Percentage who answered "somewhat in favour" or "absolutely in favour".



Source: L'Observatoire Cetelem de l'Automobile 2022.



KEY FIGURES

7/10

SUV owners
use their car to
go on holiday

15,251

the average number of
kilometres SUVs are driven
annually, compared with
13,506 km for other
types of vehicle

34%

of SUV owners hesitated
before buying their vehicle
because they were concerned
about fuel consumption

3 values

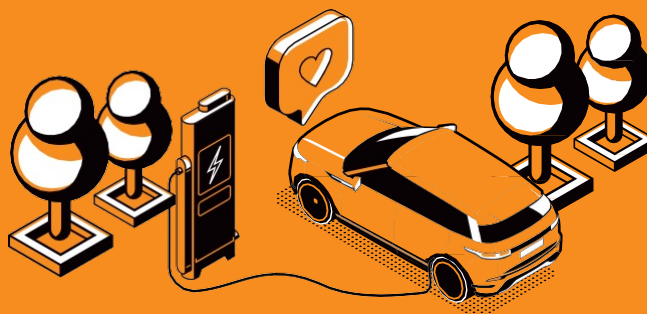
associated with SUVs:
a family vehicle, off-road
capability and safety

29%

of non-SUV owners
are thinking of buying one
within the next 12 months

7/10

respondents believe
that an electric SUV
pollutes less than a
combustion vehicle



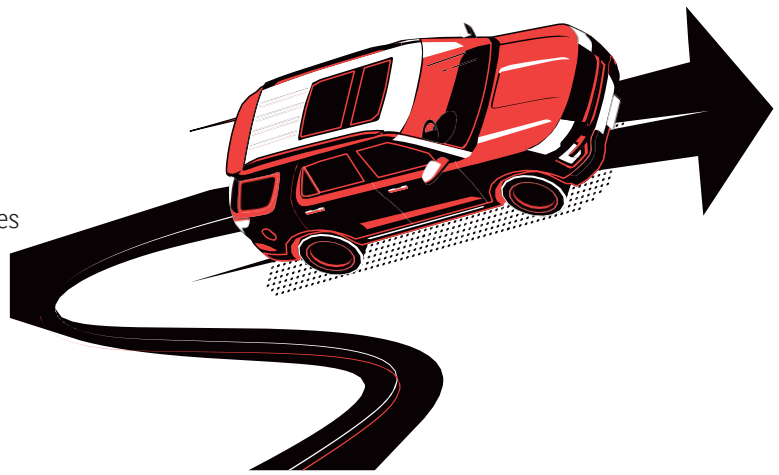
EPILOGUE

While they may be a topic conducive to media debate, particularly with respect to the environment, motorists tend not to view SUVs the same way.

The results of this survey confirm what the sales figures have been demonstrating for years: the success of SUVs has been nothing short of dazzling, as evidenced by their popularity among motorists who have been won over by their singular design. This is a design that makes real sense for SUVs, because it revolves more around the concept behind these vehicles than their looks. It is by no means a coincidence that they account for close to 40% of global car sales. The SUV is the ultimate family car, one that is both safe and comfortable, with many strengths that have won over motorists around the world.

But how far will SUVs go? It is hard to predict. Will they eventually become pretty much the only category of vehicle on the market? This is very unlikely. But what is not in doubt is the success they will continue to enjoy in the future, as demonstrated by motorists' purchase intentions. 6 out of 10 SUV owners would be prepared to buy one again within the next 12 months. 3 out of 10 non-SUV owners are similarly minded. This figure offers proof, if any were needed, that these vehicles are gaining widespread popularity.

At a time when city dwellers are moving to the country, when the public health situation is still uncertain and when the issue of safety, in the wider sense, is an integral part of our daily lives, SUVs hold great appeal and will continue to do so. Admittedly, in a context where the climate emergency has never been so pressing and so clear, their environmental "performance" gives pause for thought. However, their electrification appears to be an effective way of reconciling their detractors and aficionados. And crucially, manufacturers have come to the realisation that, now more than ever before, electric vehicles have the power to raise passions. This becomes starkly evident if one glances at a release schedule that highlights the focus carmakers now have on the environment and sustainability. Whether or not they own an SUV, today's motorists are all about the watts, a shift that spells a bright future for SUVs.



COUNTRY FACT SHEETS



BELGIUM • BRAZIL • CHINA • FRANCE • GERMANY • ITALY • JAPAN • MEXICO • NETHERLANDS • NORWAY
POLAND • PORTUGAL • SOUTH AFRICA • SPAIN • UNITED KINGDOM • UNITED STATES • TURKEY



South Africa

■ South Africa ■ World ■ All countries surveyed

What place do cars hold?

Motorization rate¹
2019

174

vehicles
per 1,000 inhabitants
(World: 182 in 2015)



**2020 SUV
market shares⁴**

35%

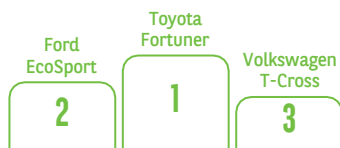
South Africa

↗
(+6 pts)
/2015

45%

World

TOP 3 best-selling SUVs in 2020⁴



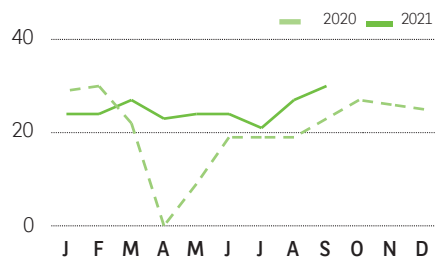
**2020 EV + PHEV
market shares³**

■ 0%

■ 4.6%

Monthly new passenger vehicle (NPV) sales

(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.25** | 2021 **0.30** (+22%) | 2022 **0.30** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

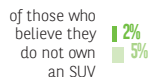
SUMMARY

In South Africa, SUVs account for one-third of all car sales. Seen as family cars first and foremost, SUVs are admired for their value for money, with half of non-owners considering buying a vehicle from this category.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



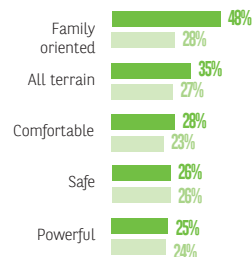
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

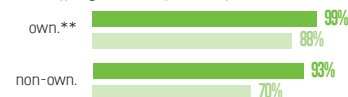
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

What place do cars hold?

Motorization rate¹
2021

575 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



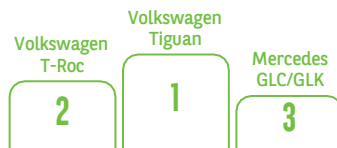
2020 SUV
market shares⁴

35%
Germany

(+12 pts)
/2015

45%
World

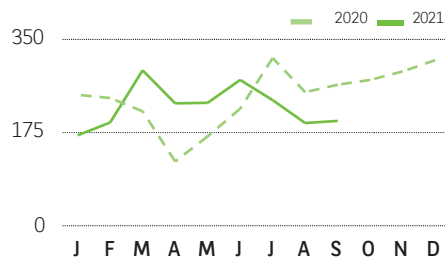
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

13.5%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **2.92** | 2021 **2.68** (-8%) | 2022 **2.68** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

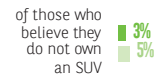
Germany retains a strong attachment to the saloon car, whose silhouette is emblematic of its premium car manufacturers. SUVs are less prevalent here than in many of the other countries surveyed, as well as drawing stronger criticism, especially from non-owners. Nonetheless, SUV sales are growing, driven by the extensive ranges of domestic carmakers.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

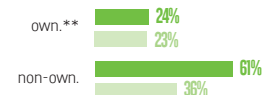


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



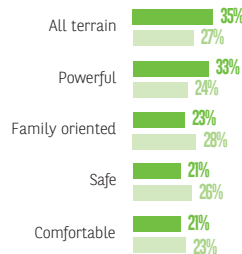
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

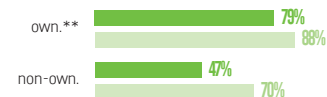
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

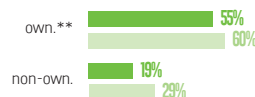


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

508 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

42%
Belgium
(+15 pts)
/2015

45%
World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

■ 11.2%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.43** | 2021 **0.38** (-12%) | 2022 **0.38** (00%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

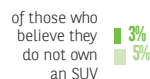
SUMMARY

Like in most other European countries, the market share of SUVs in Belgium has increased sharply in recent years. However, the Belgians are fairly critical of this type of vehicle and purchase intentions are low, even among existing SUV owners.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



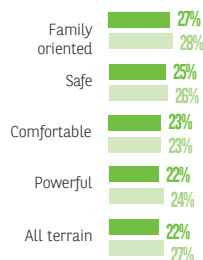
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

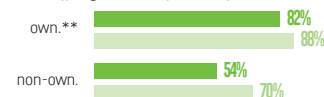
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

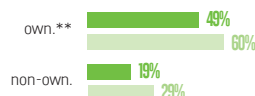


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

275 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



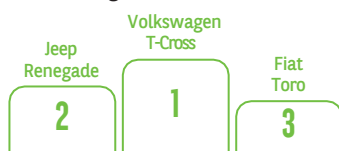
2020 SUV
market shares⁴

26%
Brazil

(+0 pts)
/2015

45%
World

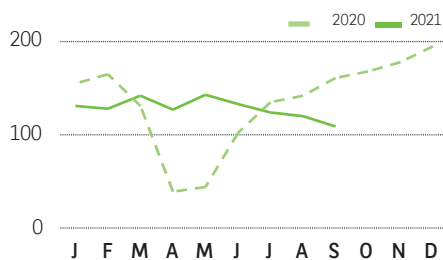
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

0%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.62** | 2021 **1.59** (-2%) | 2022 **1.59** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Brazil is one of the few countries in this study where the market share of SUVs, which is relatively small, has not increased in recent years. Chosen for their practicality rather than their style, purchase intentions for these vehicles are nonetheless high, even among non-owners.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



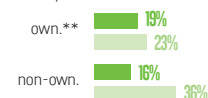
Percentage of respondents who believe that criticisms of SUVs are justified

... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



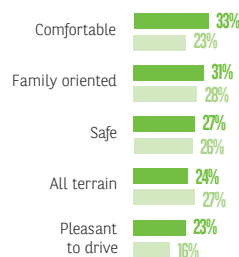
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less





■ China ■ World ■ All countries surveyed

What place do cars hold?

Motorization rate¹ 2018

90 vehicles
per 1,000 inhabitants
(World: 182 in 2015)

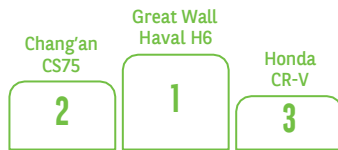


2020 SUV market shares⁴

48%
China
(+12 pts)
/2015

45%
World

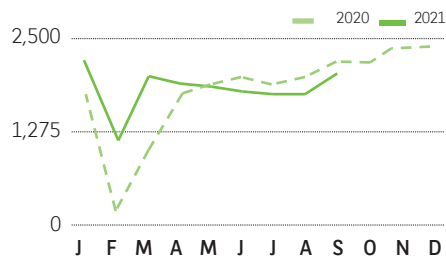
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

■ 57%
■ 46%

Monthly new passenger vehicle (NPV) sales (in thousands of vehicles)



Market forecasts (in millions of new passenger vehicles)

2020 **20.14** | 2021 **20.82** (+3%) | 2022 **20.82** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

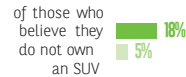
SUMMARY

Even in China, where the three-box saloon has traditionally been a mark of status, SUVs now occupy a prominent position, both in terms of sales and purchase intentions. Given that the motorization rate is still low, the potential of SUVs is considerable.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



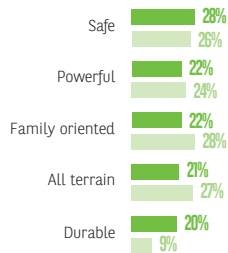
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

What place do cars hold?

Motorization rate¹
2021

533 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

43%
Spain

(+16 pts)
/2015

45%
World

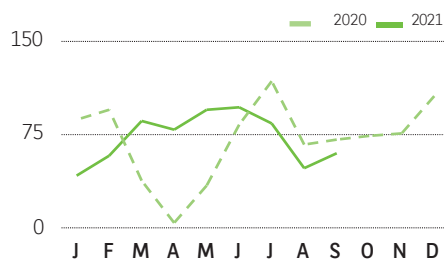
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

5%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.85** | 2021 **0.84** (-1%) | 2022 **0.84** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

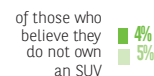
SUMMARY

SUV sales have risen rapidly in Spain over the last few years. There is considerably less criticism of SUVs here than in other countries.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



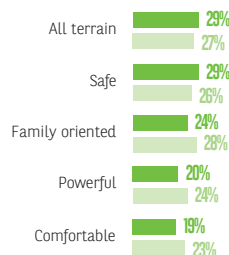
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

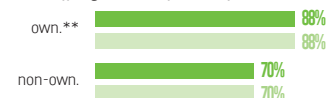
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

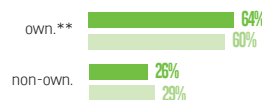


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less





United States

United States World All countries surveyed

What place do cars hold?

Motorization rate¹
2018

767 vehicles
per 1,000 inhabitants
(World: 182 in 2015)

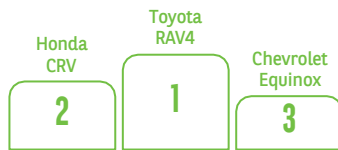


**2020 SUV
market shares⁴**

52% (+14 pts)
United States

44%
World

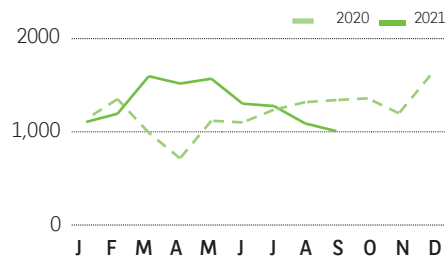
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

2%
4.6%

Monthly new passenger vehicle (NPV) sales
(in thousands of vehicles)



Market forecasts (in millions of new passenger vehicles)

2020 **14.47** | 2021 **15.27** (+5%) | 2022 **15.27** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

In the United States, the land of cars and wide open spaces, the SUV is king, accounting for over half of all sales. Yet, the Americans are relatively sensitive to the criticisms levelled at SUVs, particularly with regard to pollution. While intentions to purchase this category of vehicle remain high, it is quite possible that the segment's growth will experience a slowdown over the coming years.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

of those who believe they own an SUV **29%** **45%**

of those who believe they do not own an SUV **8%** **5%**

... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified

own.** **41%** **50%**

non-own. **69%** **66%**

Percentage of respondents who believe that SUVs pollute more than other vehicles

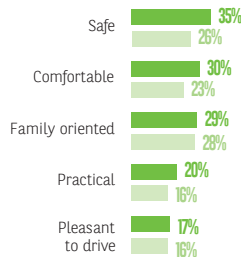
own.** **29%** **23%**

non-own. **41%** **36%**

SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

own.** **94%** **88%**

non-own. **80%** **70%**

Annual distance driven

own.** **16,133km** **15,251km**

non-own. **14,795km** **13,506km**

The growth in sales is set to continue

Many are considering choosing an SUV as their next car...

own.** **67%** **60%**

non-own. **33%** **29%**

... especially since they believe that going electric should mean that SUVs pollute less

all **79%** **77%**

What place do cars hold?

Motorization rate¹
2021

570 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



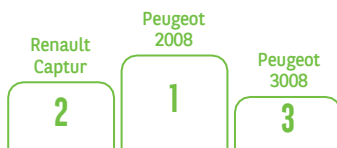
**2020 SUV
market shares⁴**

40%
France

↗
(+9 pts)
/2015

45%
World

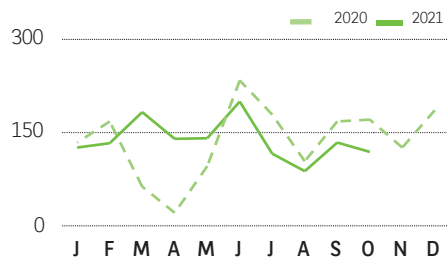
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

■ 11.3%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.65** | 2021 **1.63** (-1%) | 2022 **1.63** (+00%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

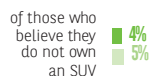
Even in France, the birthplace of the MPV, SUVs have become the number one body style in terms of desirability. Domestic manufacturers have adjusted their ranges and their vehicles are now the best-selling models in this market segment. Neither criticism, sometimes virulent, nor the mention of specific taxes or even sales restrictions are enough to undermine the SUV's success.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners, non-own.: non-SUV owners
Sources: ¹ ACEA, ² OICA, ³ IEA, ⁴ Statista, ⁵ Autoways.

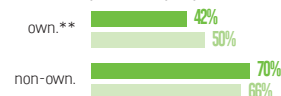
SUV: three divisive letters

A body style some find hard to identify... ... and which is sometimes criticised, especially by non-SUV owners

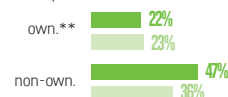
Percentage of respondents who are mistaken about the type of vehicle they own



Percentage of respondents who believe that criticisms of SUVs are justified



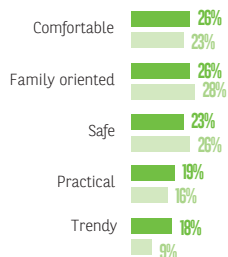
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

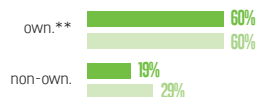


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less





Italy

Italy World All countries surveyed

What place do cars hold?

Motorization rate¹
2021

655 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



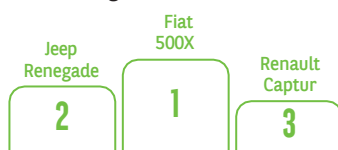
**2020 SUV
market shares⁴**

40%
Italy

(+15 pts)
/2015

45%
World

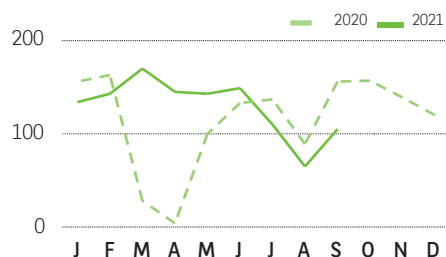
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

43%
46%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.38** | 2021 **1.47** (+6%) | 2022 **1.47** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

In Italy, a country whose city cars have traditionally been very popular, the SUV is also enjoying an impressive and ever increasing level of success. Much like in the domestic car market as a whole, the most compact SUVs tend to achieve the highest sales.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

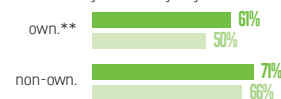


of those who believe they do not own an SUV

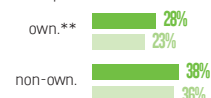
5%
5%

... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



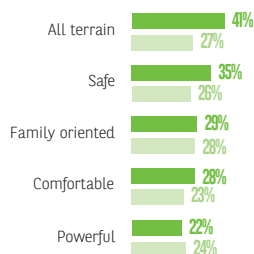
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

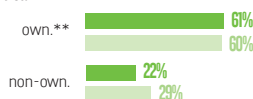
A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

What place do cars hold?

Motorization rate¹
2017

488 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



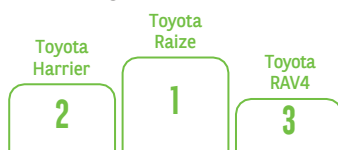
**2020 SUV
market shares⁴**

36%
Japan

↗
(+1 pt)
/2015

45%
World

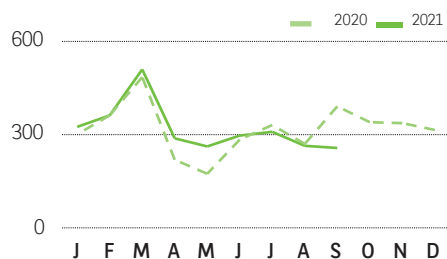
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

↓ 0.6%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 3.81 | **2021 3.7** (-3%) | **2022 3.7** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

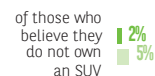
In Japan, where domestic manufacturers have been producing market-leading SUVs for many years, the category's market share is quite stable and comparatively moderate. Domestic carmakers, which had previously led the way in hybrid technology, are lagging behind when it comes to electric vehicles, whose market share is tiny.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners, non-own.: non-SUV owners
Sources: ¹ ACEA, ² OICA, ³ IEA, ⁴ Statista, ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify... ... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who are mistaken about the type of vehicle they own



Percentage of respondents who believe that criticisms of SUVs are justified



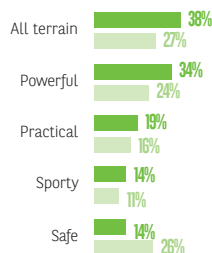
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

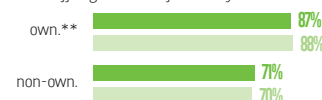
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

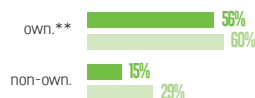


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2020

264 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



**2020 SUV
market shares⁴**

19%
Mexico

(+4 pts)
/2015

45%
World

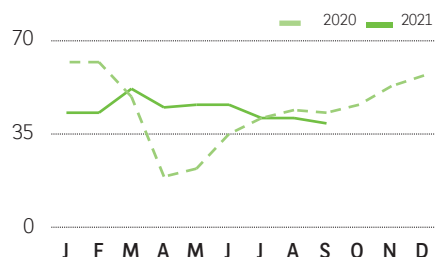
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

↓ 0.3%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.53** | 2021 **0.54** (+2%) | 2022 **0.54** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

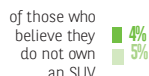
SUMMARY

In Mexico, one in every five cars sold is an SUV, the lowest market share of all the countries surveyed. And yet, this is a category that is lauded for the value for money it offers. If the purchase intentions expressed materialise, SUVs will make greater headway.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

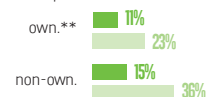


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



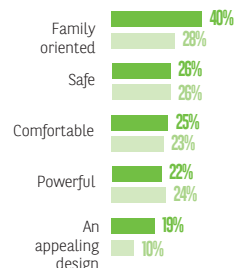
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2018

516 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



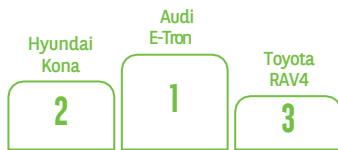
**2020 SUV
market shares⁴**

35%
Norway

(+12 pts)
/2015

45%
World

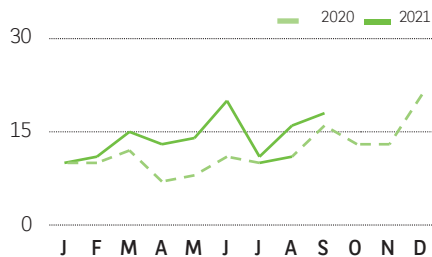
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**



Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.14** | 2021 **0.17** (+17%) | 2022 **0.17** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

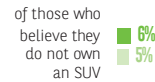
SUMMARY

Three-quarters of the vehicles sold in Norway are electric, so it is no surprise that the best-selling SUV is the Audi E-tron

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

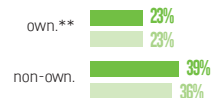


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



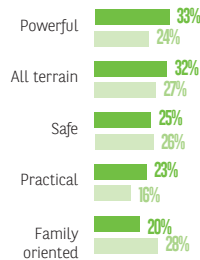
Percentage of respondents who believe that SUVs pollute more than other vehicles



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... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less





Netherlands

■ Netherlands ■ World ■ All countries surveyed

What place do cars hold?

Motorization rate¹
2021

517

vehicles
per 1,000 inhabitants
(World: 182 in 2015)



**2020 SUV
market shares⁴**

33%

Netherlands

(+14 pts)
/2015

45%

World

TOP 3 best-selling SUVs in 2020⁴

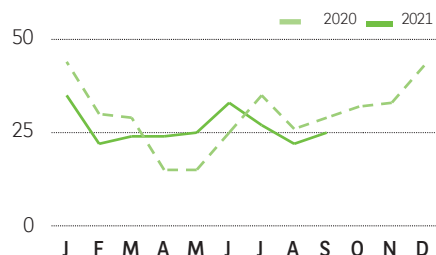


**2020 EV + PHEV
market shares³**

25%
4.6%

Monthly new passenger vehicle (NPV) sales

(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.36** | 2021 **0.32** (-9%) | 2022 **0.32** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

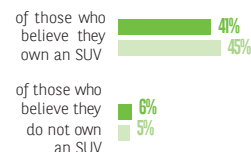
SUMMARY

SUVs have a strong presence in the land of the bicycle. However, they attract more criticism in the Netherlands than elsewhere, particularly from non-SUV owners, few of whom are considering purchasing one as their next car.

SUV: three divisive letters

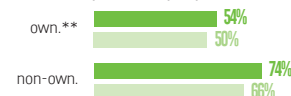
A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

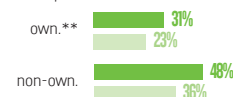


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



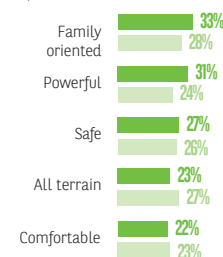
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

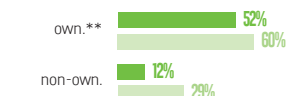


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA, ² OICA, ³ IEA, ⁴ Statista, ⁵ Autoways.



Poland

■ Poland ■ World ■ All countries surveyed

What place do cars hold?

Motorization rate¹
2021

642 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



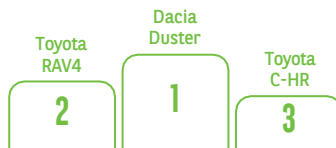
2020 SUV
market shares⁴

36%
Poland



45%
World

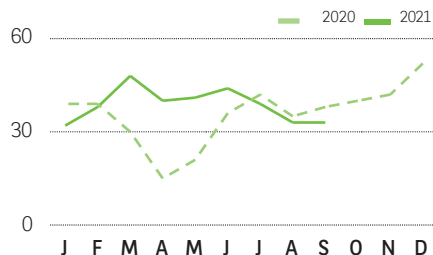
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

↓ 0.8%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.43** | 2021 **0.46** (+6%) | 2022 **0.46** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

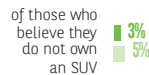
SUMMARY

Along with Italy, Poland is the European country with the highest level of car ownership. SUVs enjoy a decent market share and the value for money they offer is appealing to Poles, with the Dacia Duster taking the top spot in terms of sales.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



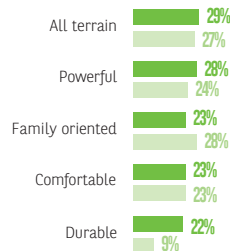
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

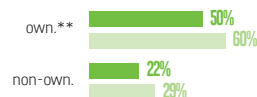


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

What place do cars hold?

Motorization rate¹
2021

506 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



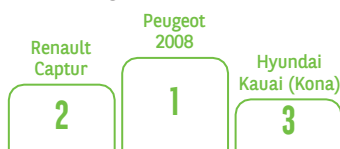
**2020 SUV
market shares⁴**

28%
Portugal

(+11 pts)
/2015

45%
World

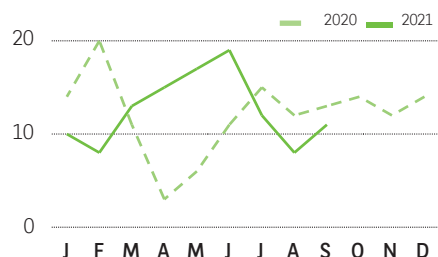
TOP 3 best-selling SUVs in 2020⁴



**2020 EV + PHEV
market shares³**

■ 13.8%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.15** | 2021 **0.14** (-2%) | 2022 **0.14** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

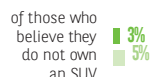
SUMMARY

Portugal is one of the European countries where the market share of SUVs is the lowest. Like in Italy, the most compact SUVs achieve the highest sales.

SUV: three divisive letters

A body style some find hard to identify... ... and which is sometimes criticised, especially by non-SUV owners

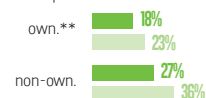
Percentage of respondents who are mistaken about the type of vehicle they own



Percentage of respondents who believe that criticisms of SUVs are justified



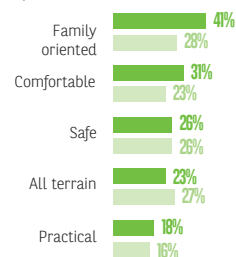
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

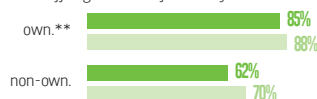
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

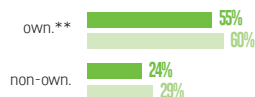


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less





United Kingdom

What place do cars hold?

Motorization rate¹
2018

488 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

41%

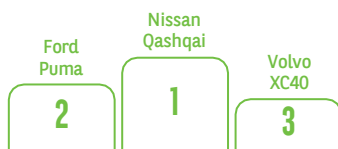
United Kingdom

(+15 pts)
/2015

45%

World

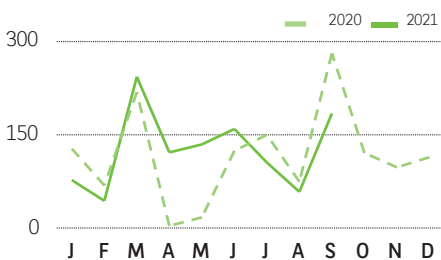
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

11.3%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (in millions of new passenger vehicles)

2020 **1.63** | 2021 **1.58** (-3%) | 2022 **1.58** (+00%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

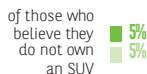
The SUV market is growing fast in the UK. However, there is a clear divide between owners and non-owners of SUVs, with the latter being very critical of these vehicles and voicing their reluctance to acquire one.

United Kingdom World All countries covered by the survey

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

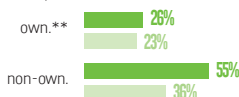


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



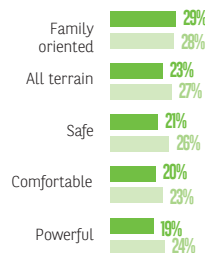
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

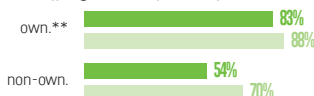
A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

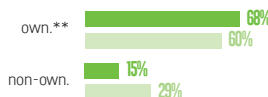


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

What place do cars hold?

Motorization rate¹ 2018

151

vehicles
per 1,000 inhabitants
(World: 182 in 2015)



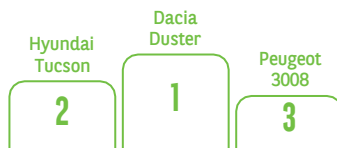
2020 SUV market shares⁴

28%
Turkey

(-5 pts)
/2015

45%
World

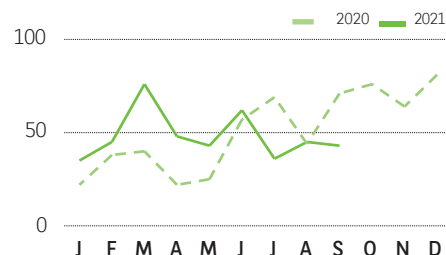
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

0.3%
4.6%

Monthly new passenger vehicle (NPV) sales (in thousands of vehicles)



Market forecasts (in millions of new passenger vehicles)

2020 **0.61** | 2021 **0.58** (-4%) | 2022 **0.58** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

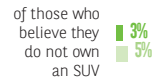
SUMMARY

Turkey is the only country in our survey where the (relatively modest) market share of SUVs is contracting. But this could soon change, as intentions to purchase SUVs are high. This is a category of vehicle admired for the value for money it offers.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

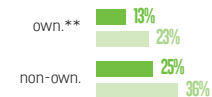


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



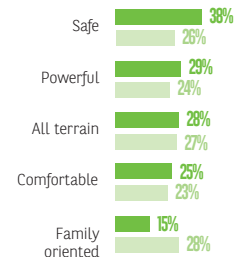
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



PARTNERS & METHODOLOGY



The economic and marketing analyses, as well as the forecasts, were performed in conjunction with the survey and consulting firm **C-Ways**, a specialist in Anticipation Marketing.

Quantitative consumer interviews were conducted by **Harris Interactive on 3-20 September 2021 in 17 countries:** Belgium, Brazil, China, France, Germany, Italy, Japan, Mexico, Netherlands, Norway, Poland, Portugal, South Africa, Spain, United Kingdom, United States and Turkey. In total, 11,000 individuals were interviewed online (CAWI method). These individuals, aged 18 to 65, were drawn from national samples representative of each country. The quota method was employed to ensure that the sample was representative (gender and age). 3,000 interviews were conducted in France and 500 in each of the other countries.

Co-authored by: Luc Charbonnier and C-Ways

Editorial coordination: Patricia Bosc

Design: © Altavia Cosmic

Illustrations: Altavia Cosmic, Shutterstock

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