



Survey on Public Attitudes towards Policies on Car Plate Control and Road Restriction

- Ipsos (China) Consulting Co., Ltd.
- May 2020

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GAME CHANGERS



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Part 01

EXECUTIVE SUMMARY

Attitude toward restriction on car purchase

In favor of car purchase restriction policies, especially non-car owners
Also non-car owners believe that the current policies should be improved

The main reason of supporting

- Prefer green transportation & worry about automobile exhaust
- More car owners worry about traffic jams and parking lots
- More non-car owners care about climate warming and energy saving

The main reason of not supporting

- Feeling of unfair, some families have no car while some have many
- More car owners think industry emission should be controlled

Where to improve?

- Limit the max vehicle number per family

Attitude toward traffic control

In favor of current traffic control on weekdays, especially non-car owners

The main reason of supporting

- To relieve road congestion (higher than other cities) and Beijing residents feel the traffic jam is more serious, compared with other cities

The main reason of not supporting

- Public transportation is inconvenient, especially car owners

Attitude toward restriction on car ownership

- ▶ Support to restrict vehicle number by families (1-2 cars per family)
- ▶ The main reason of not supporting
 - Feeling of violation of personal freedom
 - Support requiring fixed parking place rather than restricting per family

Car Purchasing plan

- ▶ 69% of non-car owners are considering purchasing a car, especially those who have an income higher than 120k RMB per month

Driving habit

- ▶ With more alternative options, Beijing car owners have a lower driving frequency compared to other cities
- ▶ Driving mainly for daily commute
- ▶ Unwilling to give up the plate even they do not drive frequently

Traffic condition

- ▶ Highest degree of congestion, compared with other cities
- ▶ However, residents in Beijing think the congestion have reduced in recent years and the condition will become better in the future

Attitude toward restriction on car purchase

- In favor of car purchase restriction policies, especially non-car owners
- Also non-car owners believe that the current policies should be improved
- The main reason of supporting
 - Prefer green transportation, especially car owners
 - More non-car owners care about climate warming and energy saving
- The main reason of not supporting
 - Should support green transportation rather than restricting car purchase
 - Developing new energy vehicle also get higher support than other cities
- Where to improve?
 - Limit the max vehicle number per family

Attitude toward traffic control

- Not very supportive for traffic control on weekdays, especially car owners
- The main reason of supporting
 - To relieve road congestion
 - More car owners worry about the lack of parking space
 - Non-car owners care more about the climate warming and energy saving
- The main reason of not supporting
 - Feeling violation of personal freedom

Attitude toward restriction on car ownership

- ▶ Support to restrict vehicle number by families (2 cars per family)
- ▶ The main reason of not supporting
 - Feeling violation of personal freedom, which is stronger than other cities

Car Purchasing plan

- ▶ 64% of non-car owners are considering purchasing a car, especially those who have an income higher than 120k RMB per month

Driving habit

- ▶ Higher driving frequency than other cities, especially ratio of everyday
- ▶ Driving mainly for daily commute and travelling
- ▶ Slightly higher willingness to give up plate even they do not drive frequently

Traffic condition

- ▶ High degree of congestion, which ranked the 2nd among cities
- ▶ Congestion has been improved in recent years
- ▶ Not very confident that the congestion will be improved in the future

Attitude toward restriction on car purchase

Support car purchase restriction and believe that the current policies should be improved (no difference between car owners and non-owners)

The main reason of supporting

- Prefer green transportation, especially car owners
- Care more about climate warming and energy saving than other cities
- More car owners worry about traffic jams

The main reason of not supporting

- Should develop new energy vehicle rather than restricting car purchase
- Providing more parking lots also get higher support than other cities

Where to improve?

- Limit the max vehicle number per family

Attitude toward traffic control

Not very supportive for traffic control on weekdays, especially car owners

The main reason of supporting

- To reduce air pollution as well as relieving road congestion
- Care more about the climate warming and energy saving than other cities

The main reason of not supporting

- Feeling violation of personal freedom, which is stronger than other cities
- Believe that the reasons are not enough, especially the car owners

Attitude toward restriction on car ownership

- ▶ Support to restrict vehicle number by families (2 cars per family)
- ▶ The main reason of not supporting
 - Feeling violation of personal freedom

Car Purchasing plan

- ▶ More residents feel no need to purchase a car, compared with other cities
- ▶ Those who have an income higher than 120k RMB per month are more likely planning to buy a car

Driving habit

- ▶ Higher driving frequency than other cities, especially ratio of 3-4 per week
- ▶ More will drive for travelling
- ▶ Bothered by traffic jam, which is one of the reason of seldom driving
- ▶ Slightly higher willingness to give up plate even they do not drive frequently

Traffic condition

- ▶ Middle level degree of congestion, which ranked the 5th among cities
- ▶ Most think there is improvement in the past and there will be improvement in the future, but the confidence level is not very high

Attitude toward restriction on car purchase

Support car purchase restriction and believe that the current policies should be improved (higher support from car owners)

The main reason of supporting

- Prefer green transportation, especially car owners
- More car owners worry about traffic jams and parking lots
- More non-car owners care about climate warming and energy saving

The main reason of not supporting

- Feeling of unfair, some families have no car while some have many
- Non-car owners feel more necessary to road restriction

Where to improve?

- Limit the max vehicle number per family

Attitude toward traffic control

Not very supportive for traffic control on weekdays, especially car owners

The main reason of supporting

- To relieve road congestion
- More car owners worry about the lack of parking space

The main reason of not supporting

- Feeling violation of personal freedom, which is stronger than other cities
- Public transportation is inconvenient, especially car owners

Attitude toward restriction on car ownership

- ▶ Support to restrict vehicle number by families (1-2 cars per family)
- ▶ The main reason of not supporting
 - Feeling violation of personal freedom
 - Show a higher support for increasing parking cost and oil fee

Car Purchasing plan

- ▶ More residents will consider whether to purchase a car in the future, compared with other cities
- ▶ Those who have an income higher than 120k RMB per month are more likely planning to buy a car

Driving habit

- ▶ Average level of driving frequency
- ▶ More will drive for travelling and taking children to school
- ▶ Unwilling to give up the plate even they do not drive frequently

Traffic condition

- ▶ High level degree of congestion, which ranked the 3rd among cities
- ▶ More residents think the traffic condition is worse, compared with others
- ▶ A rather high confidence of improving in the future

Attitude toward restriction on car purchase

Support car purchase restriction and believe that the current policies should be improved (higher support from car owners)

The main reason of supporting

- Prefer green transportation, especially car owners
- More car owners worry about traffic jams and parking lots
- More non-car owners care about climate warming and energy saving

The main reason of not supporting

- Should support green transportation rather than restricting car purchase
- Car owners feel more necessary to provide more parking lots

Where to improve?

- Limit the max vehicle number per family, and increase the rounds of ladder lottery for families that have not won in a long time

Attitude toward traffic control

In favor of current traffic control on weekdays, especially non-car owners

The main reason of supporting

- To relieve road congestion

The main reason of not supporting

- Feeling violation of personal freedom
- More support using economic measures, especially non-car owners

Attitude toward restriction on car ownership

- ▶ Support to restrict vehicle number by families (2 cars per family)
- ▶ The main reason of not supporting
 - Feeling violation of personal freedom

Car Purchasing plan

- ▶ 68% of non-car owners are considering purchasing a car, especially those who have an income between 120k and 180k RMB per month

Driving habit

- ▶ Lower level of driving frequency, compared with other cities
- ▶ Driving mainly for daily commute
- ▶ Least willing to give up the plate even if they do not drive frequently

Traffic condition

- ▶ Middle level degree of congestion, which ranked the 4th among cities
- ▶ Residents in Hangzhou think the congestion has reduced in recent years and the condition will become better in the future

Attitude toward restriction on car purchase

Support car purchase restriction and believe that the current policies should be improved (higher support from car owners)

The main reason of supporting

→ Prefer green transportation, especially car owners

→ More non-car owners care about climate warming and traffic jam

The main reason of not supporting

→ Should support green transportation rather than restricting car purchase

→ More car owners prefer road restriction and industry emission control

Where to improve?

→ Limit the max vehicle number per family

Attitude toward traffic control

In favor of current traffic control on weekdays, especially non-car owners

The main reason of supporting

→ To relieve road congestion

→ Non-car owners care more about climate warming

The main reason of not supporting

→ Public transportation is inconvenient, especially car owners

→ Believe that the reasons are not enough, especially non-car owners

Rely more on the taxi and bicycles when unable to drive

Attitude toward restriction on car ownership

▶ Support to restrict vehicle number by families (2 cars per family)

▶ The main reason of not supporting

→ Feeling violation of personal freedom

Car Purchasing plan

▶ 71% of non-car owners are considering purchasing a car, which is higher than average, especially those have an income between 120k and 180k RMB per month

Driving habit

▶ Lower level of driving frequency, compared with other cities

▶ Driving mainly for daily commute

▶ Unwilling to give up the plate even they do not drive frequently

Traffic condition

▶ Low level degree of congestion, which ranked the 6th among cities

▶ More residents think the traffic condition is worse, compared with others

▶ Most think there will be improvement in the future, but the confidence level is not very high

Attitude toward restriction on car purchase

Support car purchase restriction and believe that the current policies should be improved (higher support from car owners)

The main reason of supporting

→ Prefer green transportation, especially car owners

→ Car owners in Haikou worry more about parking lots

The main reason of not supporting

→ Should support green transportation rather than restricting car purchase

Where to improve?

→ Limit the max vehicle number per family

→ More Haikou residents show a support for quota control

Attitude toward traffic control

Not very supportive for traffic control on weekdays, especially car owners

The main reason of supporting

→ To relieve road congestion

→ To reduce car purchase with traffic control, especially non-car owners

The main reason of not supporting

→ Public transportation is inconvenient

→ More non-car owners in Haikou show support for economic measures

Attitude toward restriction on car ownership

► Support to restrict vehicle number by families (1 cars per family)

► The main reason of not supporting

→ Feeling violation of personal freedom

Car Purchasing plan

► 71% of non-car owners are considering purchasing a car, which is higher than average, especially those have an income over 60k RMB per month

Driving habit

► Average level of driving frequency, however, Haikou car owners have a higher driving frequency than other cities, especially everyday driving

► Driving mainly for daily commute

► Unwilling to give up the plate even they do not drive frequently

Traffic condition

► Lowest level degree of congestion, which ranked the last among cities

► Sanya residents think the traffic condition is better in recent years

► Most in Hainan think there will be improvement in the future, but the confidence level is not very high



Part 02

RESEARCH MYTHODOLOGY

- **Fieldwork Period:** April 17th – May 22nd

- **Interviewing Methodology:**

Methodology	Total No. of Contact	Success sample	Success rate	Interview time
Online	39240	3500	8.9%	5.95 mins
CATI	301919	3503	1.16%	12.55 mins
Total	--	7003	--	--

- **Sample Size:**

Province	Beijing	Tianjin	Shanghai	Hangzhou	Guangdong		Hainan		
City	500	500	500	500	Guangzhou	Shenzhen	Haikou	Sanya	Others
Online	500	500	500	500	500	500	300	150	50
CATI	500	500	500	500	501	500	301	151	50
Total	1000	1000	1000	1000	1001	1000	601	301	100

Occupation Distribution in Various Cities



Industry	Occupation *	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Qingdao
Primary Industry	Agriculture, forestry and fishing	2	1	2	2	1	1	3	2	4	1
Secondary Industry	Manufacturing Industry	14	9	13	14	18	12	20	9	9	1
	Electricity, Gas or Water Production and Supply	2	2	3	3	1	2	2	2	1	1
Tertiary Industry	Wholesale or Retail	8	9	6	7	8	8	9	8	6	1
	Internet, Computer Services or Software Industry	7	9	5	8	5	8	8	6	4	1
	Construction Industry	7	7	9	7	8	7	7	10	7	1
	Finance	7	11	6	6	8	7	6	5	3	1
	Education	6	6	4	6	6	6	5	6	11	1
	Accommodation and Catering	6	6	4	6	6	5	6	4	7	1
	Transportation, Warehousing or Postal Services	4	3	5	3	6	3	3	5	5	1
	Real Estate	4	4	3	4	4	4	5	5	6	1
	Residents Services or Other Services	4	4	4	5	4	3	5	6	6	1
	Leasing or Business Services	2	2	2	2	4	1	2	2	2	1
	Health, Social Security or Social Welfare	2	2	2	2	2	2	1	2	1	1
	Culture, Sports or Entertainment	2	2	2	2	1	2	1	3	2	1
	Government or Social Organizations	2	3	3	2	2	2	1	2	5	1
Freelancer	Freelancer	6	6	7	6	4	7	5	6	9	1
Student	Student	2	3	3	3	1	1	1	1	1	1
Unemployed	Unemployed	2	3	3	2	1	1	1	2	2	1

* Only show occupations with percentage for more than 1%

Occupation Distribution in Various Cities (people without a car)



People without a car

Industry	Occupation *	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Qingdao
Primary Industry	Agriculture, forestry and fishing	2	1	4	2	-	2	4	3	3	1
Secondary Industry	Manufacturing Industry	14	10	14	16	16	13	20	10	10	10
	Electricity, Gas or Water Production and Supply	3	3	4	4	2	1	3	3	2	2
Tertiary Industry	Wholesale or Retail	9	9	9	9	10	8	10	11	6	6
	Internet, Computer Services or Software Industry	7	10	7	8	5	8	5	8	5	5
	Construction Industry	7	6	8	8	7	8	7	7	6	6
	Finance	8	15	6	6	9	6	5	4	3	3
	Education	6	6	4	6	7	6	6	3	13	13
	Accommodation and Catering	7	7	4	6	9	7	7	7	8	8
	Transportation, Warehousing or Postal Services	4	2	4	3	7	3	3	5	3	3
	Real Estate	5	4	4	4	4	4	6	3	6	6
	Residents Services or Other Services	3	3	2	4	3	3	5	4	7	7
	Leasing or Business Services	2	2	2	1	3	1	2	3	2	2
	Health, Social Security or Social Welfare	2	2	2	1	1	1	1	4	2	2
	Culture, Sports or Entertainment	2	3	3	2	2	2	1	4	3	3
	Government or Social Organizations	1	2	2	1	2	1	-	1	2	2
Freelancer	Freelancer	6	6	8	6	4	8	5	6	7	7
Student	Student	1	2	2	1	1	1	-	1	-	-
Unemployed	Unemployed	2	2	2	1	1	1	2	2	2	2

* Only show occupations with percentage for more than 1%

Occupation Distribution in Various Cities (people with a car)



People with a car

Industry	Occupation *	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Qingdao
Primary Industry	Agriculture, forestry and fishing	1	2	1	1	1	1	1	1	4	1
Secondary Industry	Manufacturing Industry	13	8	12	12	21	12	20	7	7	1
	Electricity, Gas or Water Production and Supply	1	1	1	2	1	3	1	-	1	1
Tertiary Industry	Wholesale or Retail	6	9	3	5	6	9	7	5	5	1
	Internet, Computer Services or Software Industry	7	7	4	8	6	9	11	3	4	1
	Construction Industry	8	7	10	7	9	6	6	14	8	1
	Finance	6	5	6	6	7	7	8	5	3	1
	Education	6	7	5	5	5	6	5	9	9	1
	Accommodation and Catering	4	5	3	4	3	3	4	1	5	1
	Transportation, Warehousing or Postal Services	4	5	6	3	6	3	4	4	7	1
	Real Estate	3	3	2	3	3	3	4	7	5	1
	Residents Services or Other Services	6	5	7	6	5	3	5	9	4	1
	Leasing or Business Services	2	1	2	2	5	1	3	2	1	1
	Health, Social Security or Social Welfare	2	4	2	2	3	3	1	-	-	1
	Culture, Sports or Entertainment	1	-	1	1	1	2	1	1	1	1
	Government or Social Organizations	3	3	5	4	2	3	2	3	8	1
Freelancer	Freelancer	6	7	6	7	5	6	5	7	11	1
Student	Student	2	4	4	5	2	1	1	1	1	1
Unemployed	Unemployed	2	5	3	2	1	1	1	2	3	1

* Only show occupations with percentage for more than 1%

Education Distribution in Various Cities



Education	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other Cities
Primary School and below	9	9	10	9	10	8	10	7	10	10
High School / Secondary School / Technical School	15	12	14	15	16	13	20	18	17	17
College Degree	25	23	24	26	22	27	26	28	28	30
Bachelor Degree	45	48	48	46	45	48	38	42	42	38
Master Degree and above	6	9	4	4	7	5	5	5	2	5

Education Distribution in Various Cities (people with/without a car)

People without a car

Education	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
Primary or High School and below	14	12	14	13	16	12	14	17	16	15
High School / Secondary School / Technical School	17	12	16	18	18	14	21	18	25	22
College Degree	26	21	24	23	20	31	29	31	27	44
Bachelor Degree	40	47	43	42	40	41	33	32	31	28
Master Degree and above	4	8	2	4	6	2	3	2	2	1

People with a car

Education	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
Primary or High School and below	7	7	8	9	8	6	7	5	8	10
High School / Secondary School / Technical School	14	17	13	13	13	11	17	18	16	11
College Degree	23	22	27	28	18	22	23	22	22	28
Bachelor Degree	50	44	47	46	51	55	47	48	49	44
Master Degree and above	7	10	6	4	9	6	6	7	5	3

Age Distribution in Various Cities

Age	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
25 and younger	9	13	9	8	8	9	7	5	5	2
26-30	20	25	20	17	25	22	21	11	12	2
31-35	23	22	21	25	27	26	23	21	17	1
36-40	18	16	17	17	16	20	19	24	22	2
41-45	16	12	19	18	12	12	19	23	21	2
46-50	9	8	9	10	7	7	8	10	17	1
51 and older	4	4	5	5	4	3	3	5	6	1

Age Distribution in Various Cities (people without/with a car)

People without a car

Age	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Haikou)
25 and younger	7	14	6	4	8	7	5	4	2	1
26-30	18	25	18	12	23	21	17	5	11	1
31-35	25	25	21	31	29	29	22	18	17	1
36-40	15	15	12	13	13	17	15	20	17	2
41-45	22	13	29	25	13	15	28	35	29	3
46-50	9	6	8	10	10	8	10	12	17	8
51 and older	4	3	6	4	4	3	3	6	9	6

People with a car

Age	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Haikou)
25 and younger	10	13	12	13	9	12	9	5	9	7
26-30	23	24	23	21	27	23	26	18	13	3
31-35	22	16	20	20	25	24	25	24	17	2
36-40	22	20	22	20	19	23	23	29	28	2
41-45	11	11	10	11	12	9	9	12	13	1
46-50	8	11	9	9	5	6	6	8	18	6
51 and older	4	6	4	6	4	3	2	4	4	4

Income Distribution in Various Cities

Income	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
Under ¥30k	3	4	2	2	2	4	3	2	3	1
¥30k to ¥50k	3	4	4	2	2	3	2	2	3	1
¥50k to ¥60k	2	3	3	2	3	2	3	2	2	1
¥60k to ¥90k	4	4	6	4	4	4	3	6	5	1
¥90k to ¥120k	13	10	18	13	12	10	12	19	21	1
¥120k to ¥150k	13	11	17	18	8	11	12	14	14	2
¥150k to ¥180k	13	15	16	16	9	12	13	14	13	1
¥180k to ¥210k	15	17	13	14	16	16	15	17	14	1
¥210k to ¥240k	9	11	8	8	9	9	10	6	6	1
¥240k to ¥270k	6	5	4	5	6	8	6	4	5	1
¥270k to ¥300k	5	4	2	4	8	7	6	4	3	1
¥300k and more	13	12	6	11	21	16	16	9	10	1

Income Distribution in Various Cities (people without a car)

People without a car

Income	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
Under ¥30k	3	3	1	3	2	4	3	3	3	1
¥30k to ¥50k	3	4	4	2	3	3	3	-	4	1
¥50k to ¥60k	2	2	2	1	4	2	4	1	1	1
¥60k to ¥90k	5	4	5	4	6	4	5	7	6	1
¥90k to ¥120k	14	8	15	14	13	13	14	19	28	2
¥120k to ¥150k	16	12	19	24	10	17	13	16	13	2
¥150k to ¥180k	17	17	19	20	14	15	18	20	14	1
¥180k to ¥210k	16	20	15	13	18	16	16	17	11	1
¥210k to ¥240k	10	14	10	9	10	10	11	7	9	1
¥240k to ¥270k	6	6	5	6	6	7	5	4	6	1
¥270k to ¥300k	3	3	2	3	6	2	4	3	2	1
¥300k and more	5	6	2	3	9	6	6	3	4	1

Income Distribution in Various Cities (people with a car)

People with a car

Income	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
Under ¥30k	3	6	2	2	1	3	2	2	3	1
¥30k to ¥50k	3	4	3	2	2	3	2	5	2	1
¥50k to ¥60k	3	5	5	2	1	1	2	3	4	1
¥60k to ¥90k	4	6	6	4	2	3	1	4	5	1
¥90k to ¥120k	12	13	22	11	9	7	11	18	12	1
¥120k to ¥150k	9	10	15	10	5	5	10	12	16	1
¥150k to ¥180k	8	8	11	10	4	8	7	7	12	1
¥180k to ¥210k	14	10	11	16	14	15	14	17	17	2
¥210k to ¥240k	7	3	6	8	9	9	10	5	3	1
¥240k to ¥270k	5	3	4	5	6	8	6	4	5	1
¥270k to ¥300k	8	6	3	6	10	12	8	6	5	1
¥300k and more	25	27	12	24	35	27	26	18	17	1

Number of People per Household in Various Cities



Number of people per household	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
1	6	8	3	4	9	4	6	4	6	2
2	13	15	16	11	14	11	13	9	7	5
3	48	47	51	51	50	48	45	44	50	4
4	19	19	21	18	15	20	20	22	20	2
5	10	7	7	10	9	12	11	13	10	1
6 or more	5	4	2	5	2	6	6	7	6	1

Number of People per Household in Various Cities (people without a car)



People without a car

Number of people per household	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
1	6	9	4	4	10	4	6	3	7	2
2	13	12	14	12	14	14	15	9	5	2
3	55	53	59	59	55	53	47	56	61	5
4	17	19	18	15	14	16	19	19	17	2
5	7	5	4	7	7	10	10	10	8	1
6 or more	1	2	0	1	1	3	2	4	3	4

Number of People per Household in Various Cities (people with a car)



People with a car

Number of people per household	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other cities (Hainan)
1	5	7	3	5	8	4	5	6	5	2
2	13	21	17	10	15	7	11	9	10	9
3	41	35	42	42	45	44	42	32	39	3
4	21	19	24	21	17	23	21	25	23	1
5	13	12	10	13	12	13	12	17	12	2
6 or more	7	7	4	8	4	9	8	12	11	1

Number of Cars per Household in Various Cities



Number of Cars	Total	Beijing	Tianjin	Hangzhou	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Other (Hainan)
None	52	67	50	50	50	50	50	50	50	50
1	32	20	31	34	34	36	36	30	33	33
2	12	10	15	13	13	10	11	14	11	9
3 or more	4	3	5	4	4	4	3	6	7	6

Local/Non-Local License Plate in Various Cities (on Vehicle Base)

PLATE	Total
Local	67
Non-local	33

g

PLATE	Total
Local	78
Non-local	22

gzhou

PLATE	Total
Local	75
Non-local	25

zhen

PLATE	Total
Local	59
Non-local	41

n

PLATE	Total
Local	79
Non-local	21

Shanghai

PLATE	Total
Hu A/B	25
Hu C	37
Non-local	34

Haikou

PLATE	Total
Local	94
Non-local	6

Sanya

PLATE	Total
Local	94
Non-local	6

Others (Hainan)

PLATE	Total
Local	94
Non-local	6

Hangzhou

PLATE	Total
Lottery license plate in Tong Lu	1
Lottery license plate in Chun An	1
Lottery license plate in Jian De	3
Lottery license plate in Lin'an District	10
Lottery license plate in other local districts	57
Non-local plate	28

Local/Non-Local License Plate in Various Cities (on Base of One-Car Families)



PLATE	One Car
Local	65
Non-local	35

PLATE	One Car
Local	74
Non-local	26

PLATE	One Car
Local	72
Non-local	28

PLATE	One Car
Local	63
Non-local	37

PLATE	One Car
Local	80
Non-local	20

Shanghai

PLATE	One Car
Hu A/B	43
Hu C	24
Non-local	33

Haikou

PLATE	One Car
Local	94
Non-local	6

Sanya

PLATE	One Car
Local	95
Non-local	5

Others (Hainan)

PLATE	One Car
Local	91
Non-local	9

Hangzhou

PLATE	One Car
Lottery license plate in Tong Lu	2
Lottery license plate in Chun An	1
Lottery license plate in Jian De	2
Lottery license plate in Lin'an District	15
Lottery license plate in other local districts	49
Non-local plate	31

Local/Non-Local License Plate in Various Cities (on Base of Two-Car Families)

PLATE	First	Second
Local	83	77
Non-local	17	23

g

PLATE	First	Second
Local	82	76
Non-local	18	24

Hangzhou

PLATE	First	Second
Local	85	79
Non-local	15	21

Shenzhen

PLATE	First	Second
Local	67	66
Non-local	33	34

n

PLATE	First	Second
Local	82	74
Non-local	18	26

Shanghai

PLATE	First	Second
Hu A/B	39	35
Hu C	43	44
Non-local	18	21

Haikou

PLATE	First	Second
Local	95	91
Non-local	5	9

Sanya

PLATE	First	Second
Local	97	87
Non-local	3	13

Others (Hainan)

PLATE	First	Second
Local	89	78
Non-local	11	22

Hangzhou

PLATE	First	Second
Lottery license plate in Tong Lu	1	1
Lottery license plate in Chun An	-	-
Lottery license plate in Jian De	2	2
Lottery license plate in Lin'an District	4	3
Lottery license plate in other local districts	75	62
Non-local plate	18	32

Local/Non-Local License Plate in Various Cities (on Base of Families with Three Cars or More)



PLATE	First	Second	Third
Local	82	78	77
Non-local	18	22	23

g

PLATE	First	Second	Third
Local	85	79	82
Non-local	15	21	18

Hangzhou

PLATE	First	Second	Third
Local	79	68	65
Non-local	21	32	35

Shenzhen

PLATE	First	Second	Third
Local	72	71	72
Non-local	28	29	28

n

PLATE	First	Second	Third
Local	89	82	73
Non-local	11	18	27

Shanghai

PLATE	First	Second	Third
Hu A/B	29	31	42
Hu C	34	28	26
Non-local	37	41	32

Haikou

PLATE	First	Second	Third
Local	95	95	89
Non-local	5	5	11

Sanya

PLATE	First	Second	Third
Local	100	90	95
Non-local	-	10	5

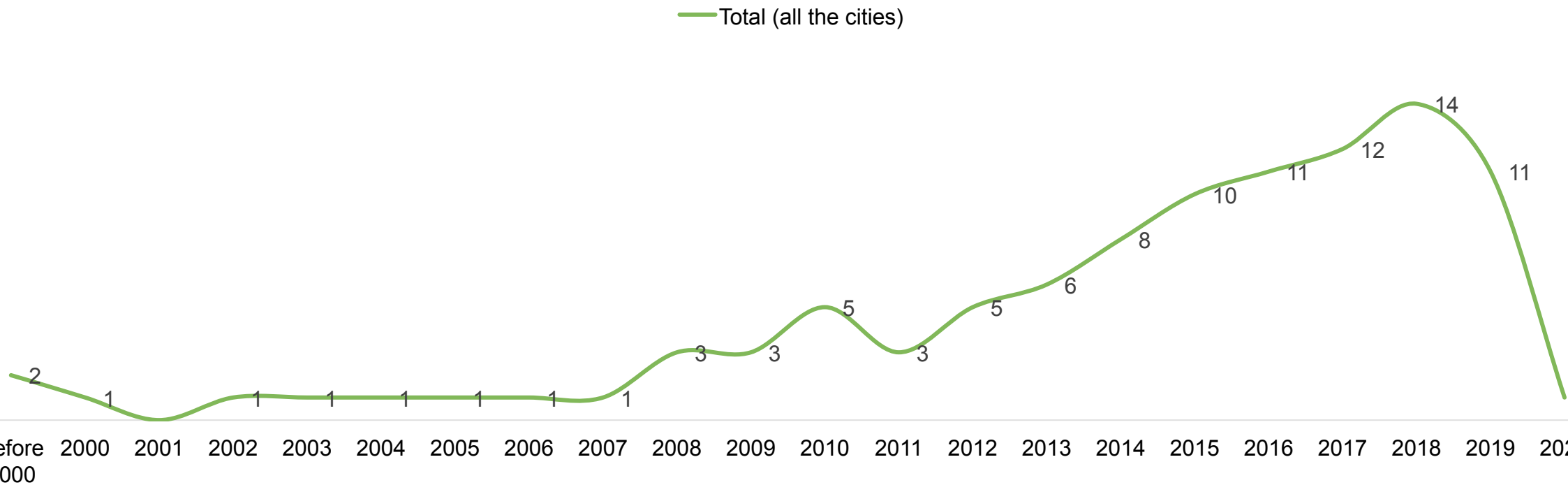
Others (Hainan)

PLATE	First	Second	Third
Local	67	100	100
Non-local	33	-	-

Hangzhou

PLATE	First	Second	Third
Lottery license plate in Tong Lu	-	-	
Lottery license plate in Chun An	3	3	
Lottery license plate in Jian De	3	6	
Lottery license plate in Lin'an District	6	9	
Lottery license plate in other local districts	61	62	
Non-local plate	27	21	

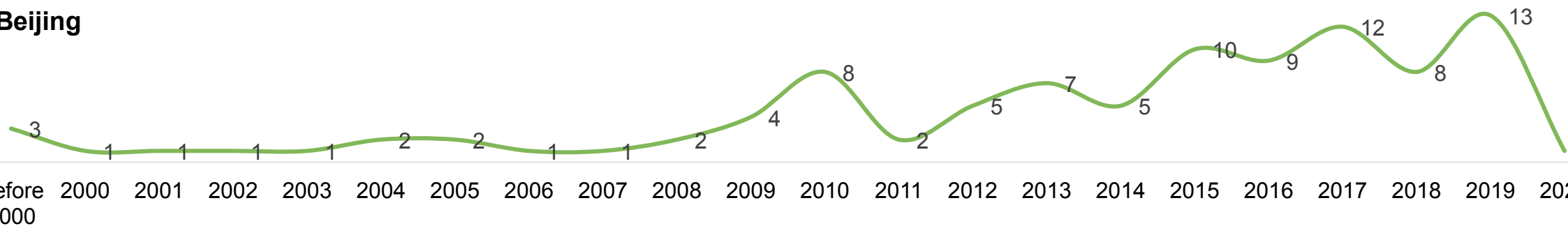
Car Purchase Year in Various Cities (on Vehicle Base)



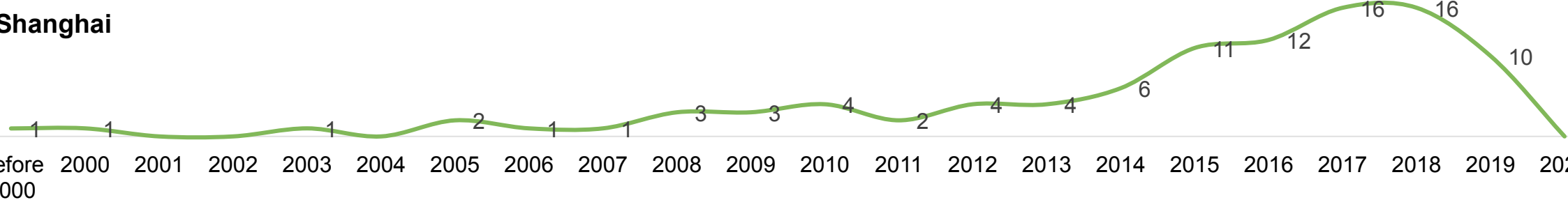
Car Purchase Year in Various Cities (on Vehicle Base)



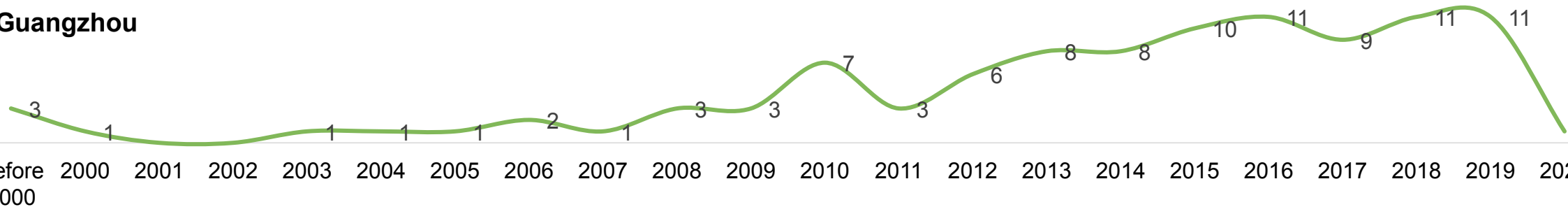
Beijing



Shanghai



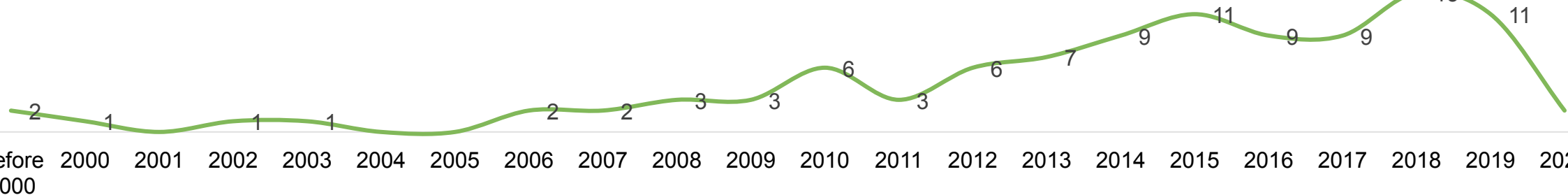
Guangzhou



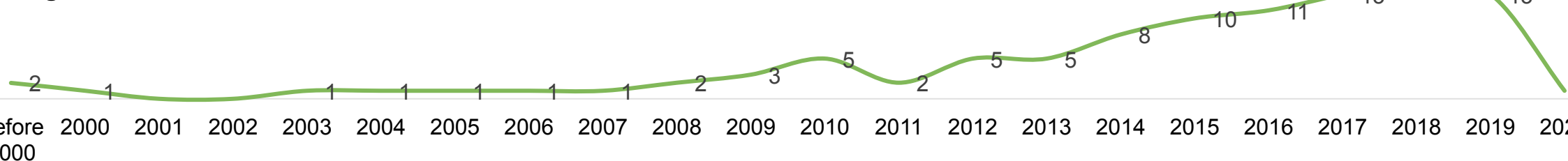
Car Purchase Year in Various Cities (on Vehicle Base)



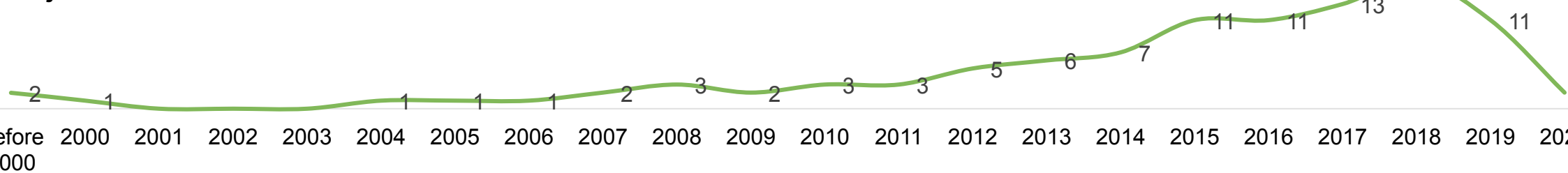
Shenzhen



Hangzhou



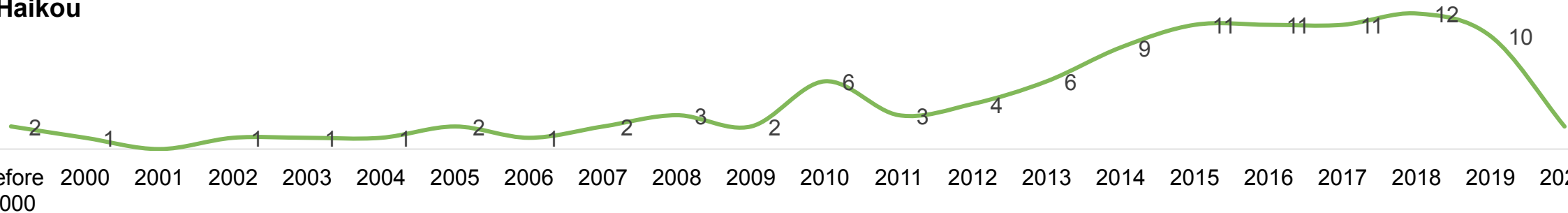
Tianjin



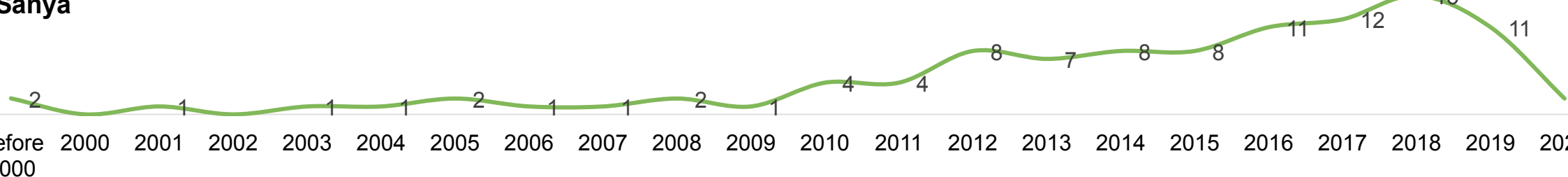
Car Purchase Year in Various Cities (on Vehicle Base)



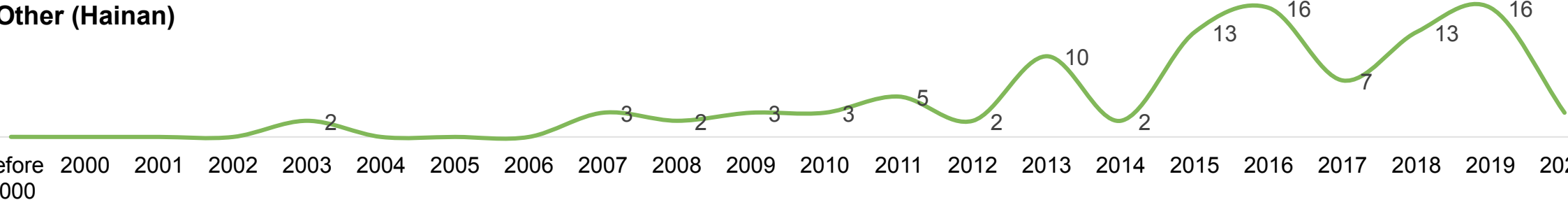
Haikou



Sanya

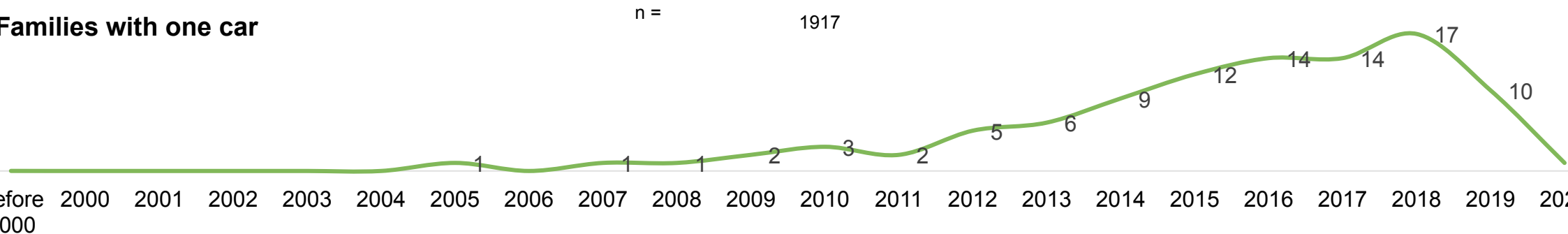


Other (Hainan)

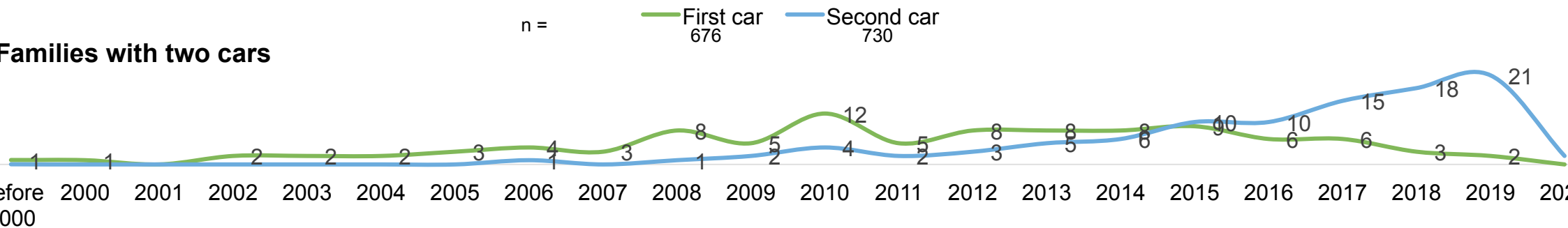


Car Purchase Year in Various Cities (on Base of Families with 1/2/3 or more cars)

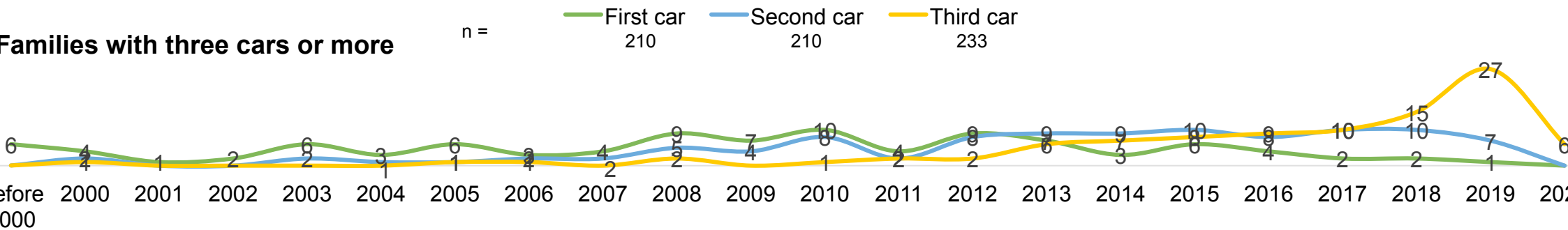
Families with one car



Families with two cars



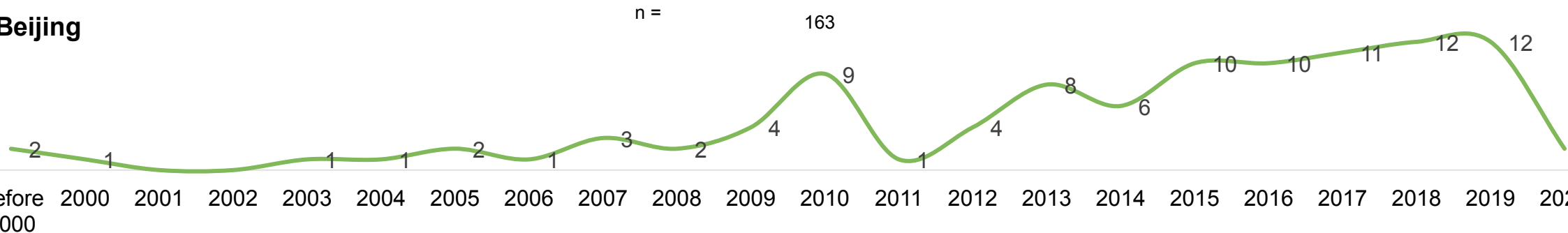
Families with three cars or more



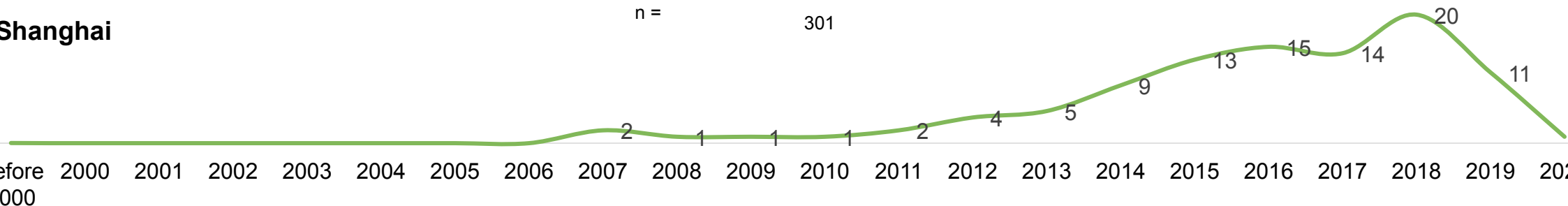
Car Purchase Year in Various Cities (on Base of One-Car Families)



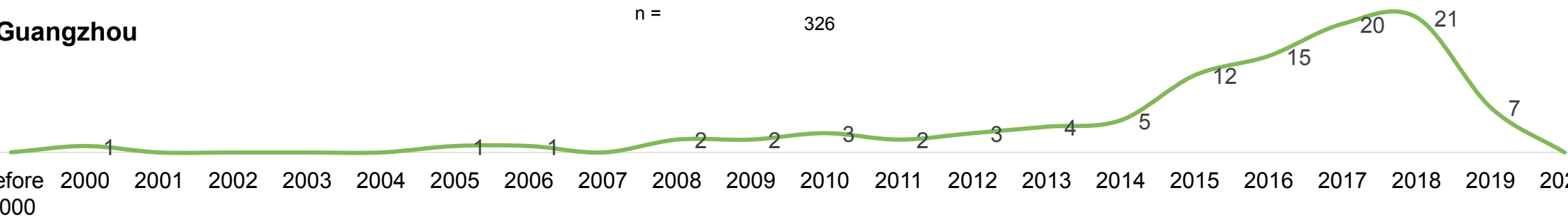
Beijing



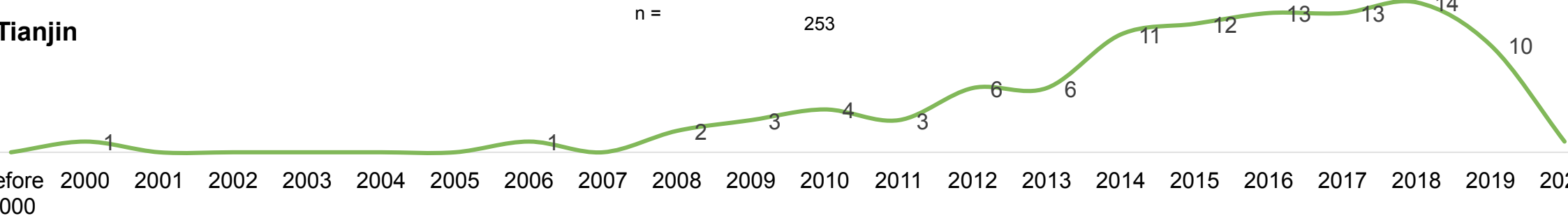
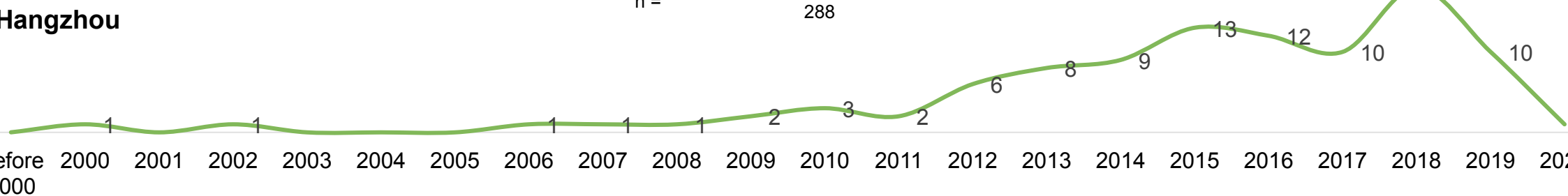
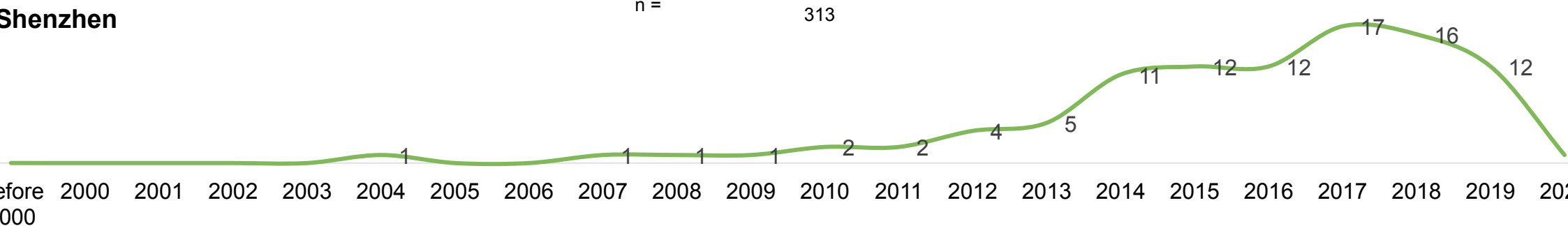
Shanghai



Guangzhou



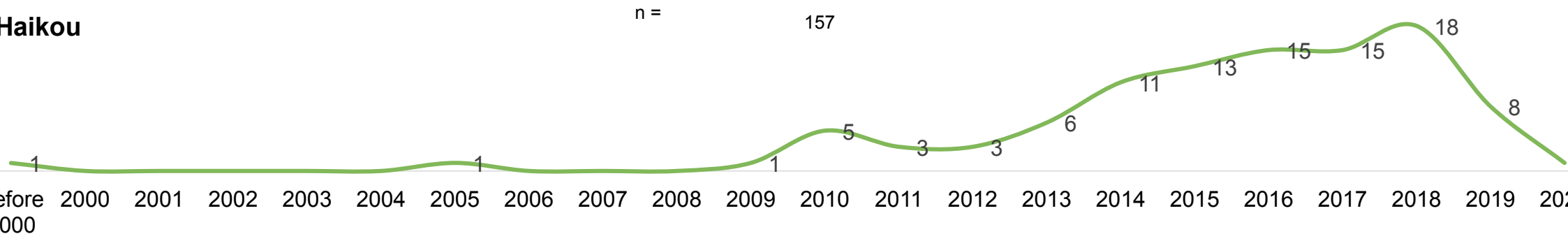
Car Purchase Year in Various Cities (on Base of One-Car Families)



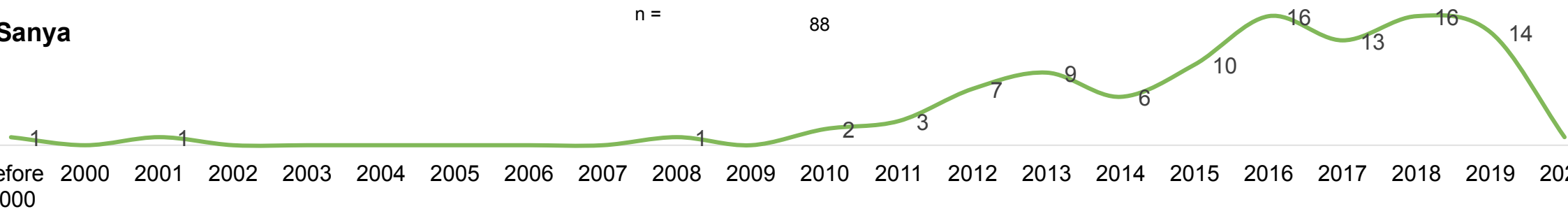
Car Purchase Year in Various Cities (on Base of One-Car Families)



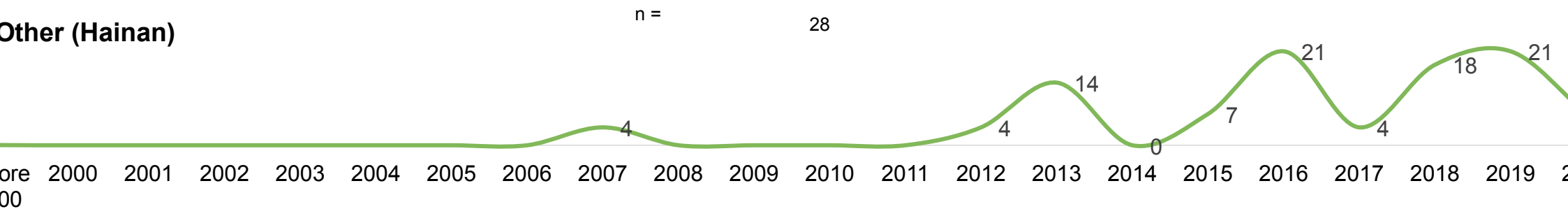
Haikou



Sanya

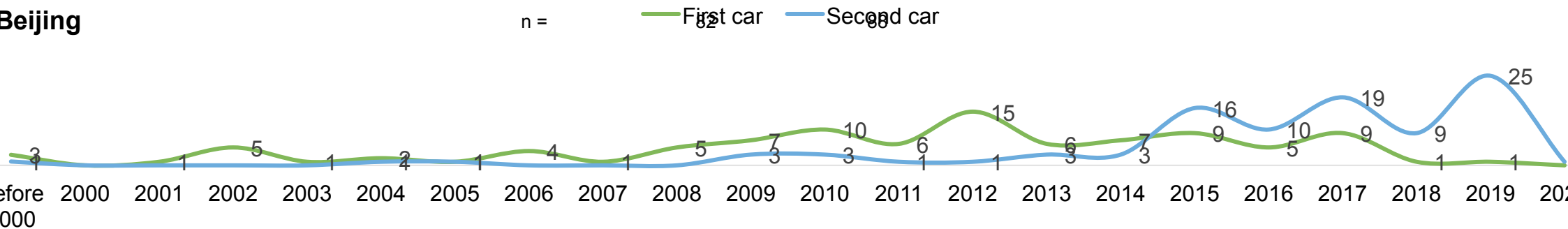


Other (Hainan)

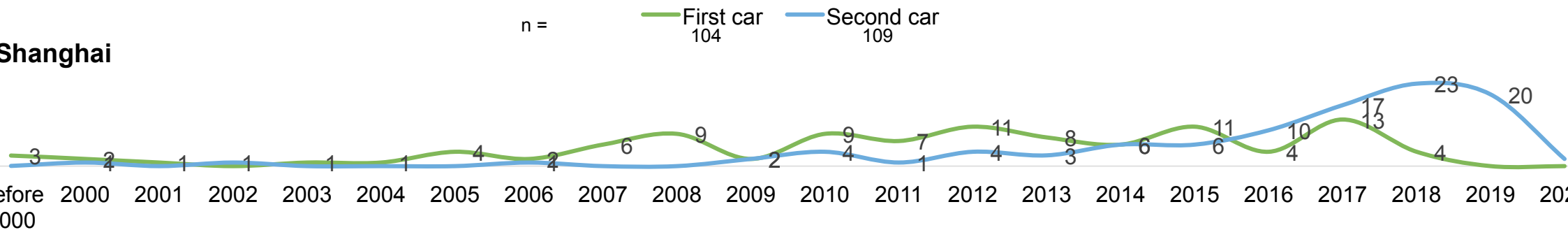


Car Purchase Year in Various Cities (on Base of Two-Car Families)

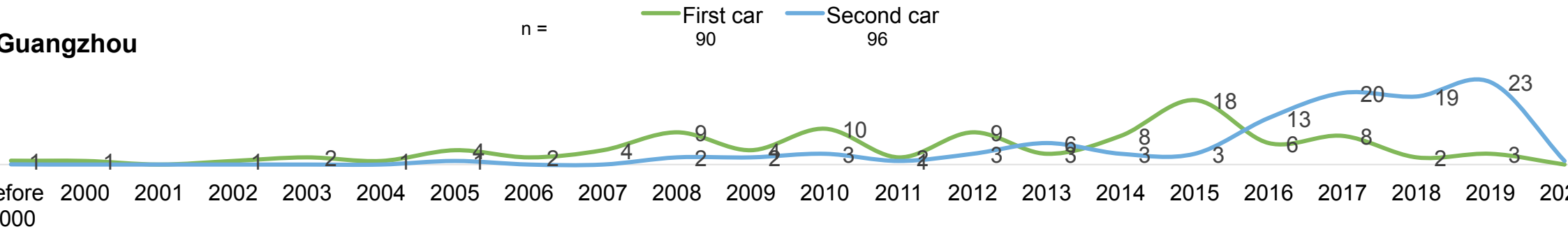
Beijing



Shanghai



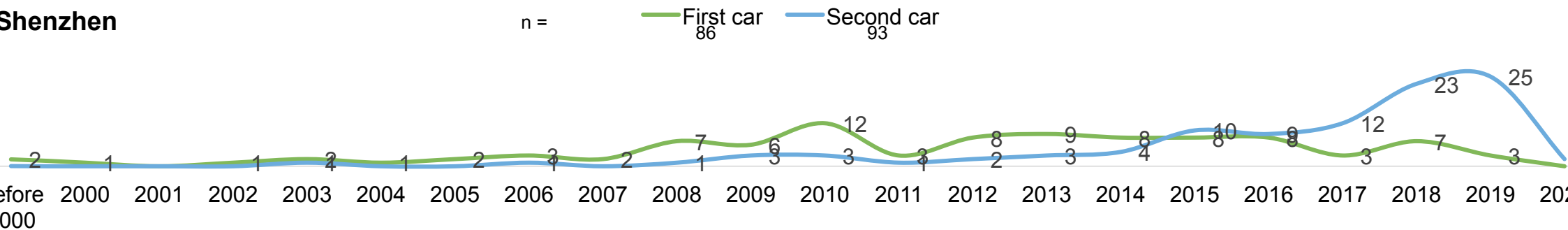
Guangzhou



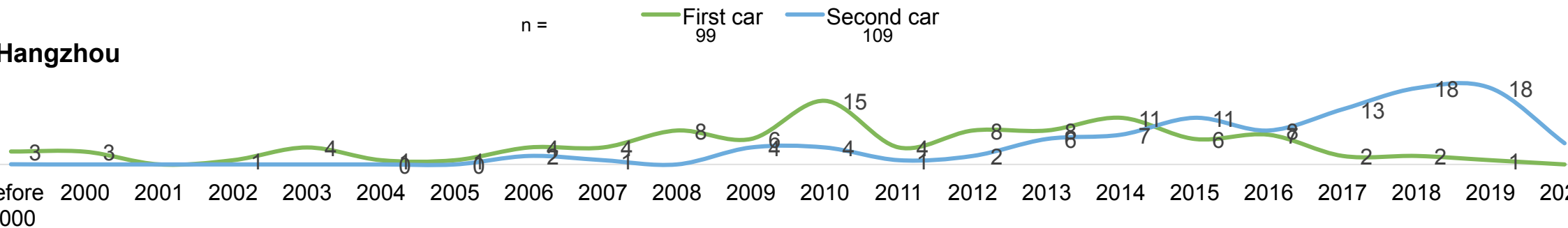
Car Purchase Year in Various Cities (on Base of Two-Car Families)



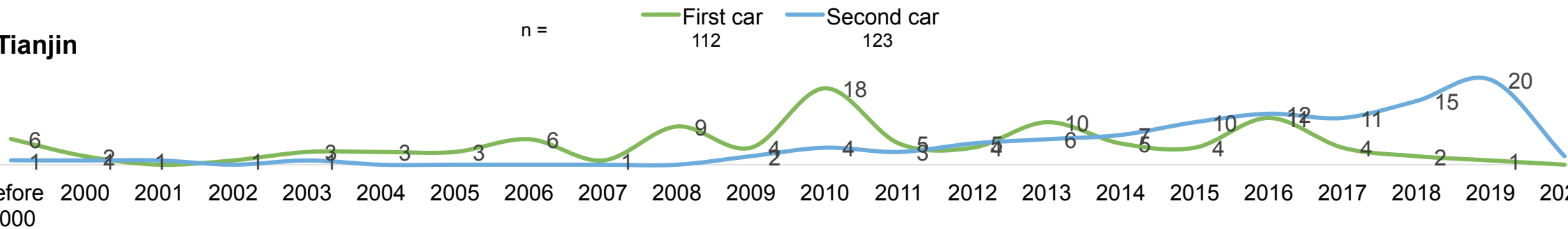
Shenzhen



Hangzhou



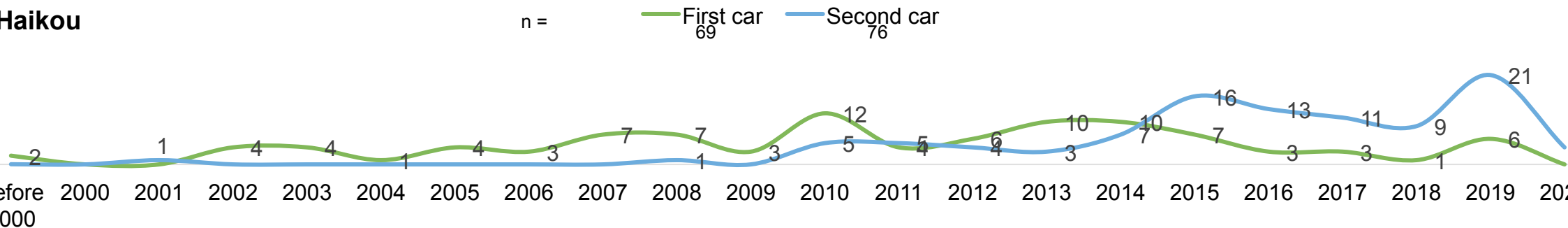
Tianjin



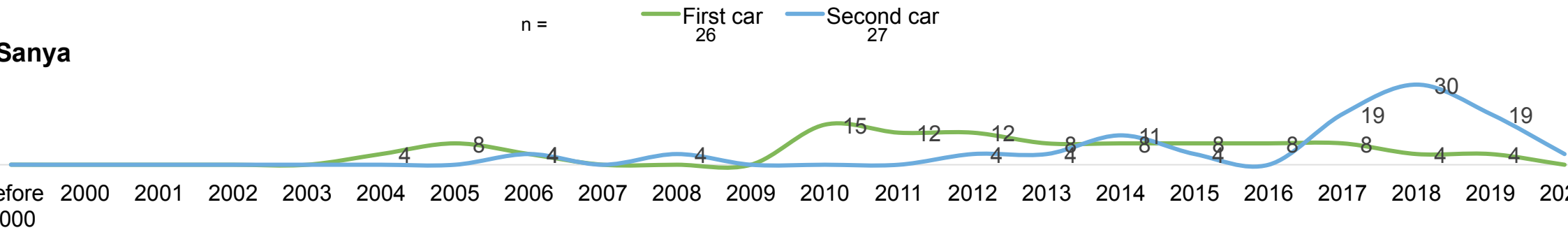
Car Purchase Year in Various Cities (on Base of Two-Car Families)



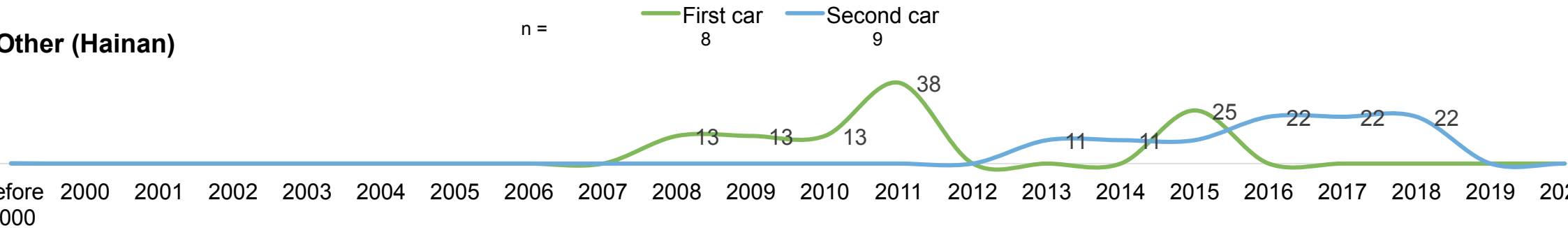
Haikou



Sanya

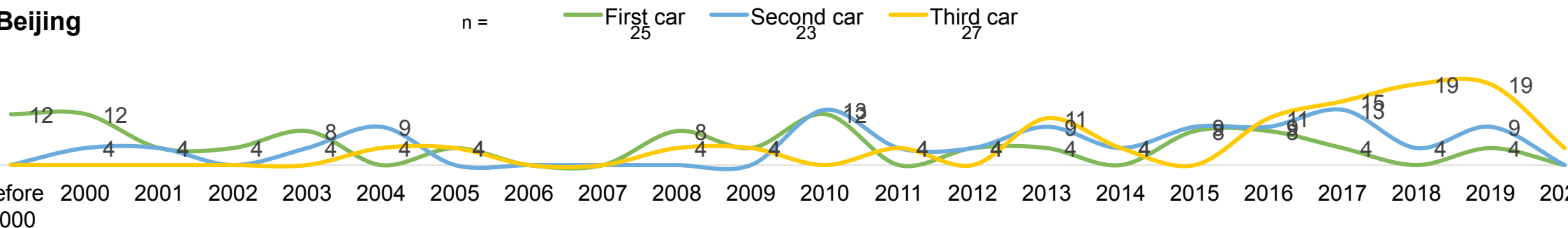


Other (Hainan)

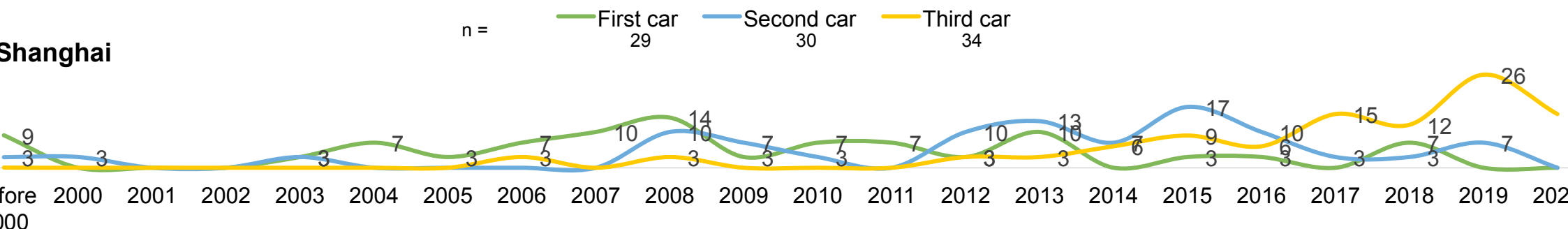


Car Purchase Year in Various Cities (on Base of Families with Three Cars or More)

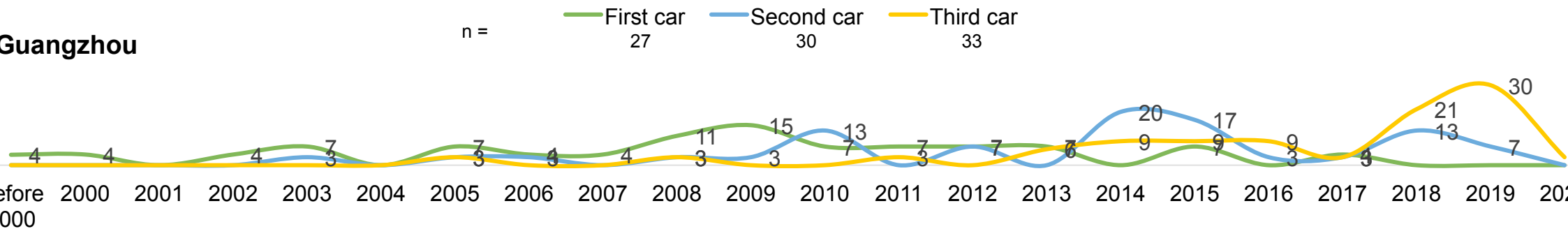
Beijing



Shanghai

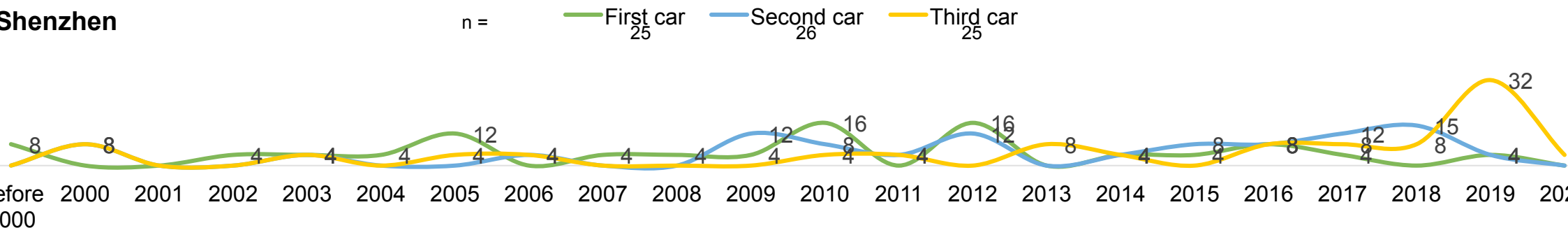


Guangzhou

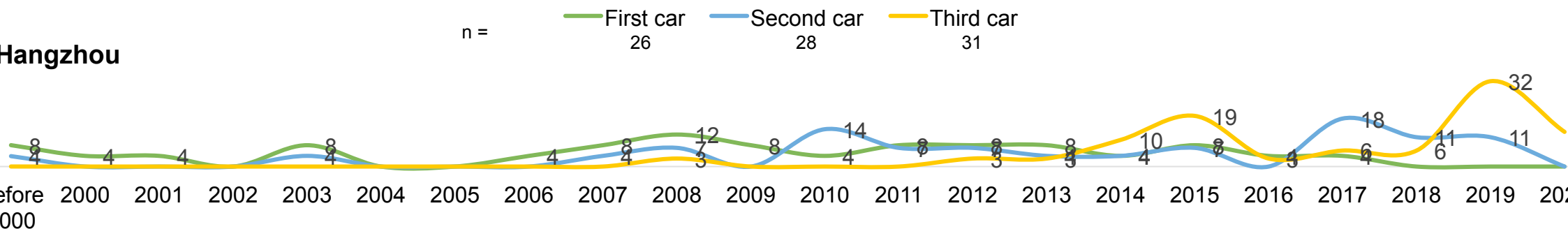


Car Purchase Year in Various Cities (on Base of Families with Three Cars or More)

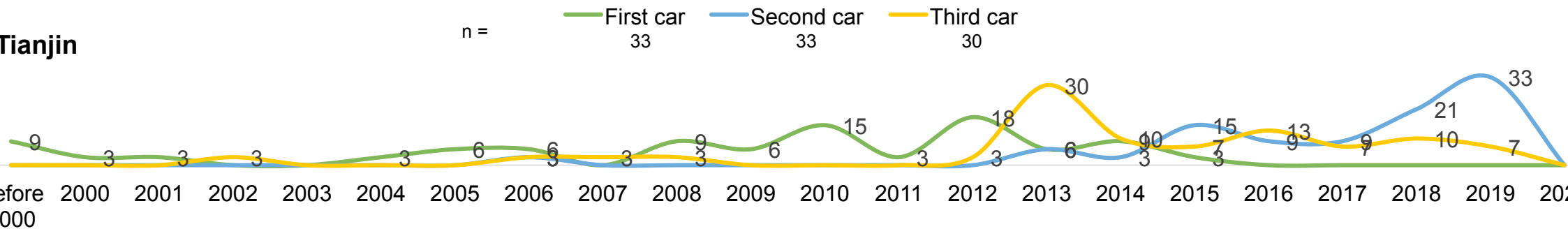
Shenzhen



Hangzhou



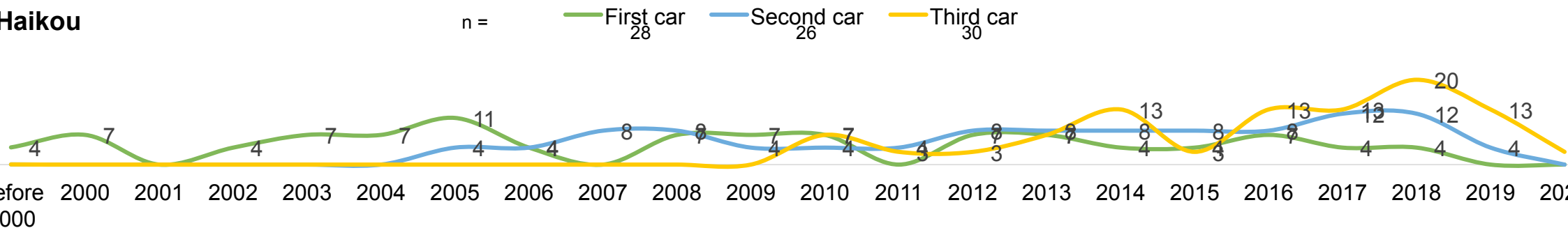
Tianjin



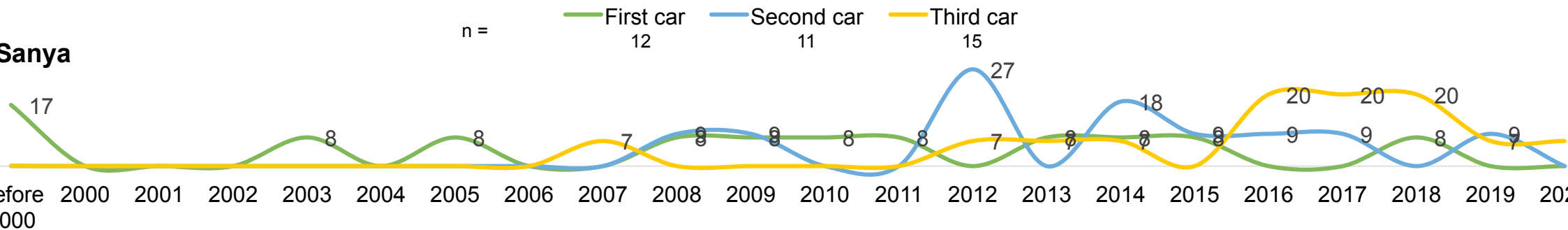
Car Purchase Year in Various Cities (on Base of Families with Three Cars or More)



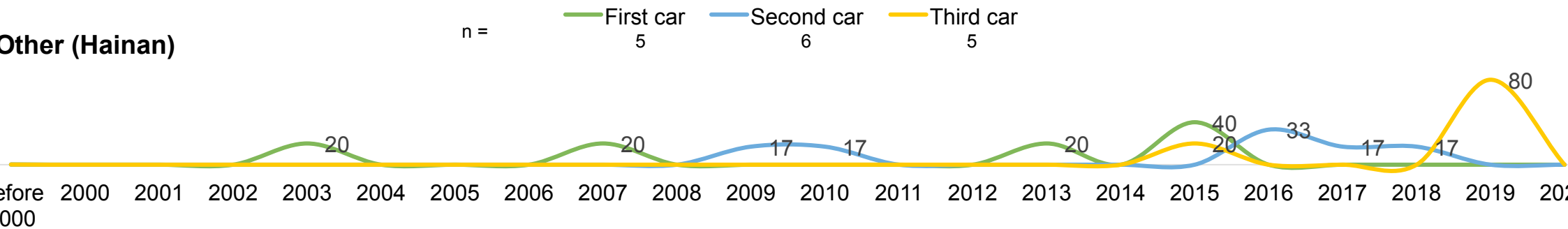
Haikou



Sanya



Other (Hainan)





Part 02

ATTITUDE TOWARD POLICIES ON ROAD RESTRICTION



**ATTITUDE TOWARD
RESTRICTION ON CAR
PURCHASE**



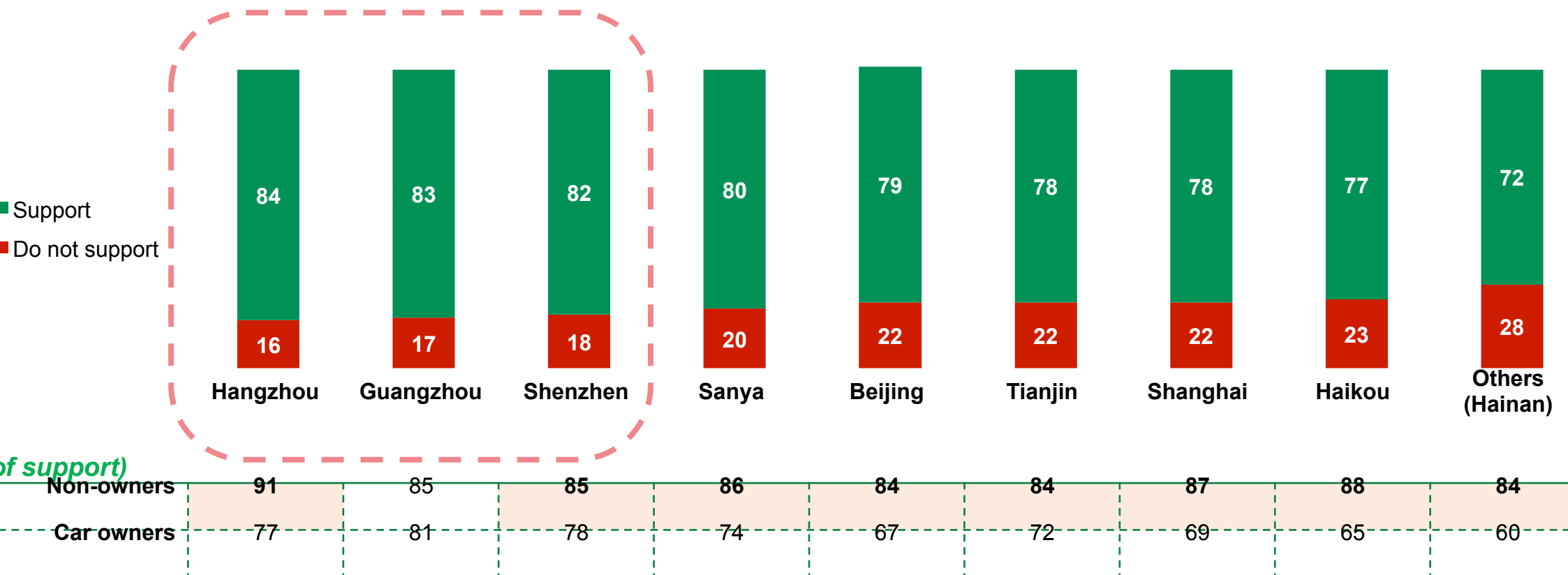
**ATTITUDE TOWARD
RESTRICTION ON CAR
OWNERSHIP**



**ATTITUDE TOWARD
RESTRICTION ON
TRAFFIC CONTROL**

The public show a favor supporting the car purchase restriction overall, especially in Hangzhou, Guangzhou and Shenzhen. Non-owners have a higher support rate towards the purchase restriction, who may think they have a higher chance of getting a car, since these policies restrict those who already had a car to purchase another.

Support of car purchase restriction




• Significance between different groups

Yellow cell means that this group (e.g. city) has a significant higher ratio than average of all participants



	Beijing	Shanghai	Guangzhou	Shenzhen
Planning	69	64	62	60
No need to buy a car	20	24	31	27
Will think about it after a few years	11	11	7	13

Red cell means that non-owners are significantly higher than owners; or owners are significantly higher than non-owners



	Beijing		Shanghai	
	Non-car owners	Car owners	Non-car owners	Car owners
Green / public transportation should be encouraged	56	54	46	58
Automobile exhaust is the major cause of air pollution	47	52	50	53
More cars, more traffic jam	35	44	40	41
To slow down climate warming	41	22	39	31
To save time for solving traffic jam	33	26	35	26
Not enough parking lot	20	36	33	35
To save energy	21	13	22	16

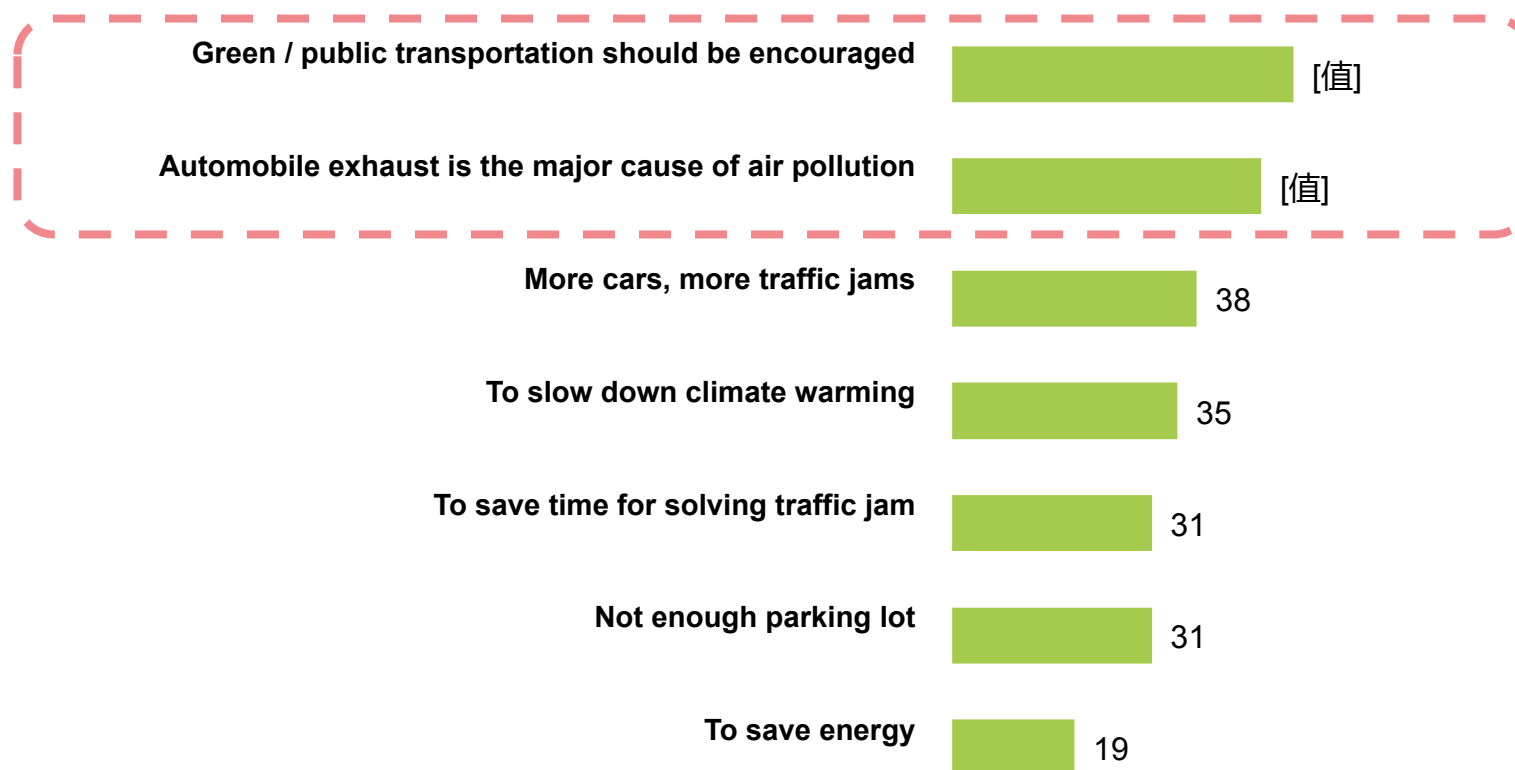
Note: Whether one ratio is significantly higher than other depends on the sample size and the level of ratio difference. A larger size and a larger ratio difference is more likely to be a “significant difference”, which means that we are 95% sure that there is difference between these two groups / this group is higher or lower than average.

Here are some samples to show the significant level in different situation.

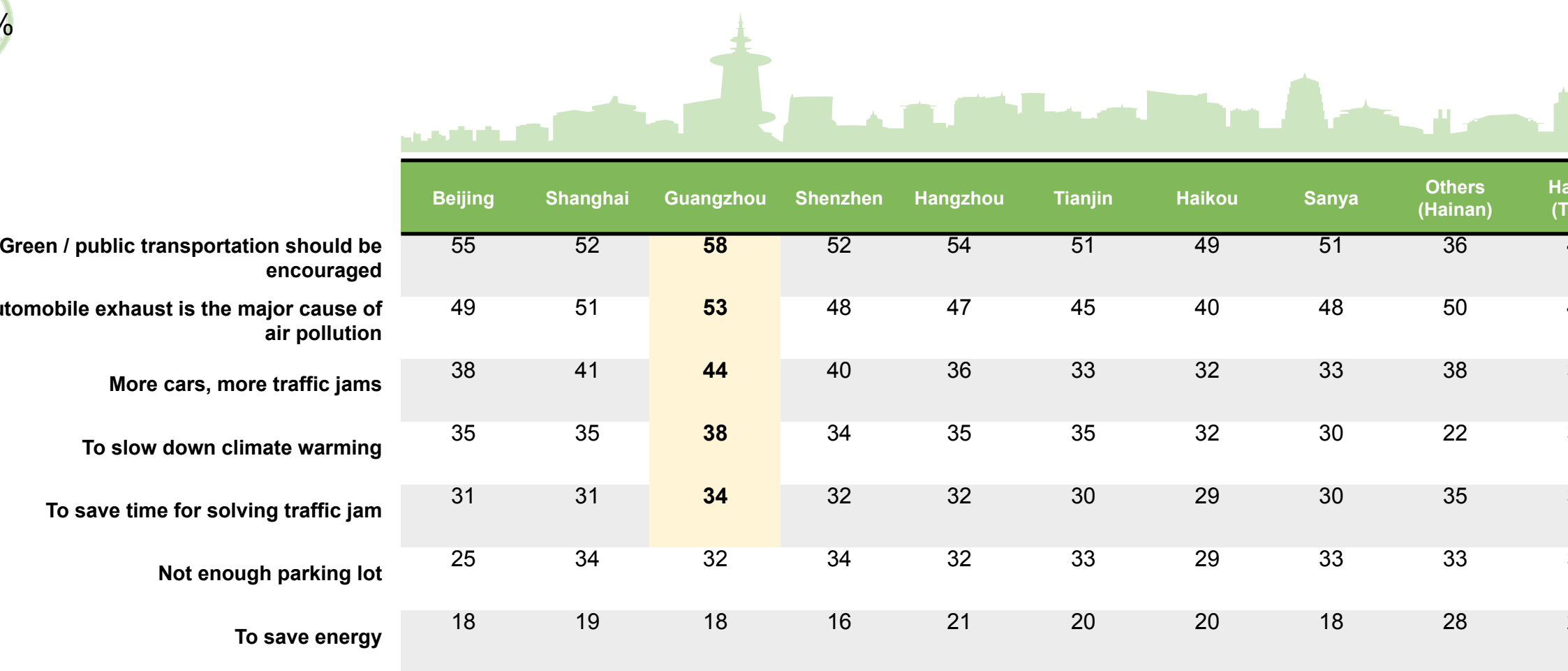
No	Sample size of group A	Sample size of group B	Ratio of group A	Ratio of group B	Significant or not
1	100	100	10	20	√
2	100	100	10	15	×
3	400	400	10	15	√
4	100	100	50	60	×
5	100	100	50	65	√
6	200	200	50	60	√
...

Those who support car purchase restriction show a favor of green/public transportation and they worry about the air pollution as well as traffic jam resulted from too many cars.

Reasons for Supporting Car Purchase Restriction



Residents in Guangzhou care more about green/public transportation, air pollution, traffic jams when they support car restriction.



Non-car owners in Bei-Shang-Guang-Shen tend to care more about climate warming and saving energy. Traffic jam is a worry for both car owners and non-car owners.



	Beijing		Shanghai		Guangzhou		Shenzhen	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Public transportation / public transportation should be encouraged	56	54	46	58	55	61	48	56
Mobile exhaust is the major cause of air pollution	47	52	50	53	51	56	48	48
More cars, more traffic jam	35	44	40	41	38	50	37	42
To slow down climate warming	41	22	39	31	40	37	38	30
To save time for solving traffic jam	33	26	35	26	33	36	35	28
Not enough parking lot	20	36	33	35	31	34	30	38
To save energy	21	13	22	16	23	14	22	10

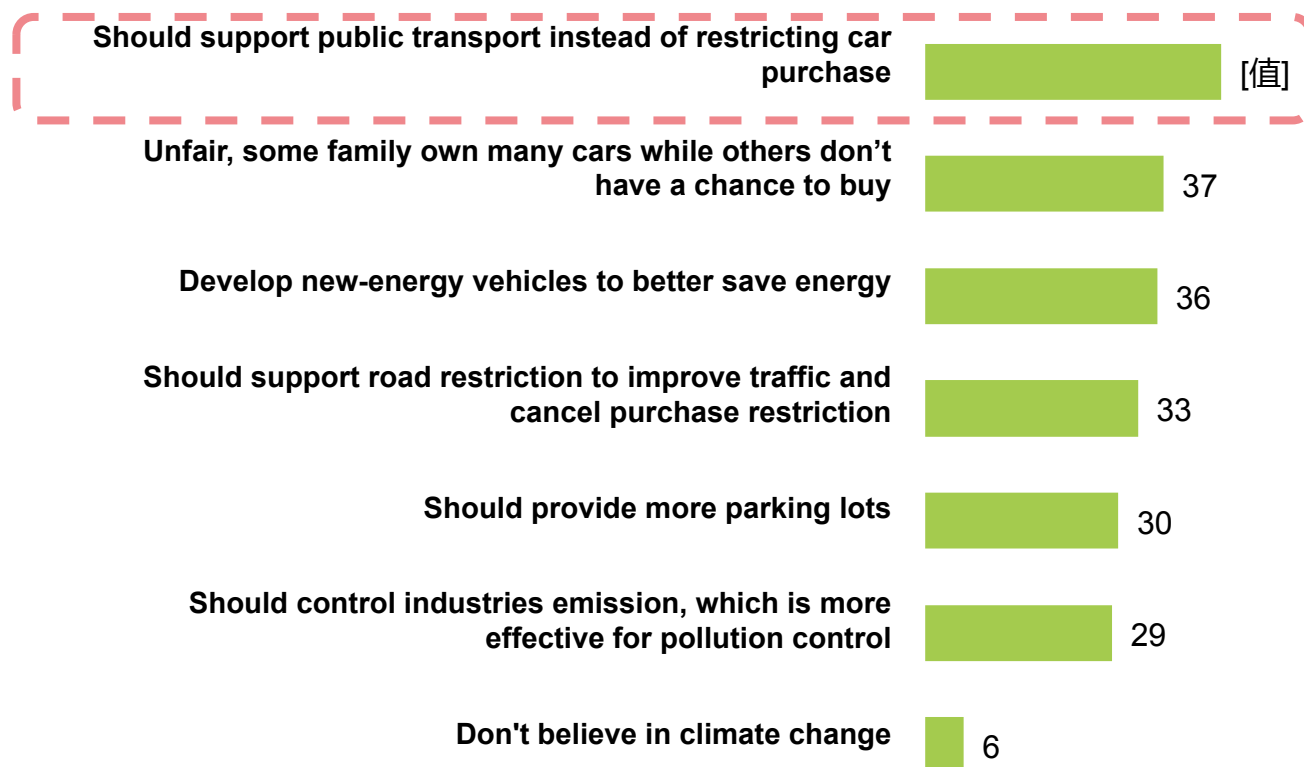
Hangzhou and Tianjin show a same pattern as Bei-Shang-Guang-Shen. In Hainan, non-car owners have no obvious support for climate warming or energy saving as the mega cities.



	Hangzhou		Tianjin		Haikou		Sanya		Other (Hainan)	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Public transportation / public transportation should be encouraged	50	60	47	56	44	56	50	52	33	40
Mobile exhaust is the major cause of air pollution	46	48	47	43	38	44	44	52	55	43
More cars, more traffic jam	36	35	31	34	32	32	30	35	48	23
To slow down climate warming	42	27	39	31	35	28	31	29	19	27
To save time for solving traffic jam	35	28	35	23	29	28	30	30	29	43
Not enough parking lot	27	37	30	36	24	37	31	34	38	27
To save energy	25	16	22	17	22	18	23	13	31	23

most half of the respondent believe giving support to public transport is a better way to deal with congestion compared to car purchase restriction.

Reasons for Not Supporting Car Purchase Restriction



Guangzhou residents show an obvious support for new energy vehicles and more parking lot other than implementing restriction policy on car purchase, while Beijing residents have a distinctly stronger feeling towards the unfairness of the policy.

	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Tianjin	Haikou	Sanya	Others (Hainan)	H (T)
Should support public transport instead of restricting car purchase	46	44	54	40	53	41	50	43	36	
Some family own many cars while others don't have a chance to buy	54	29	29	42	39	35	33	34	32	
New-energy vehicles to better save energy	28	41	58	33	33	34	29	21	46	
Support road restriction to improve traffic and cancel purchase restriction	35	23	37	36	35	33	35	43	32	
Should provide more parking lots	21	34	41	27	26	34	25	38	39	
Control industries emission, which is more effective for pollution control	27	22	33	24	29	33	36	33	14	
Don't believe in climate change	6	5	11	4	8	5	8	7	-	

Bei-Shang-Guang-Shen, car owners and non-car owners have similar reasons of not supporting car purchase restrictions. Beijing car owners care more about industry emissions.



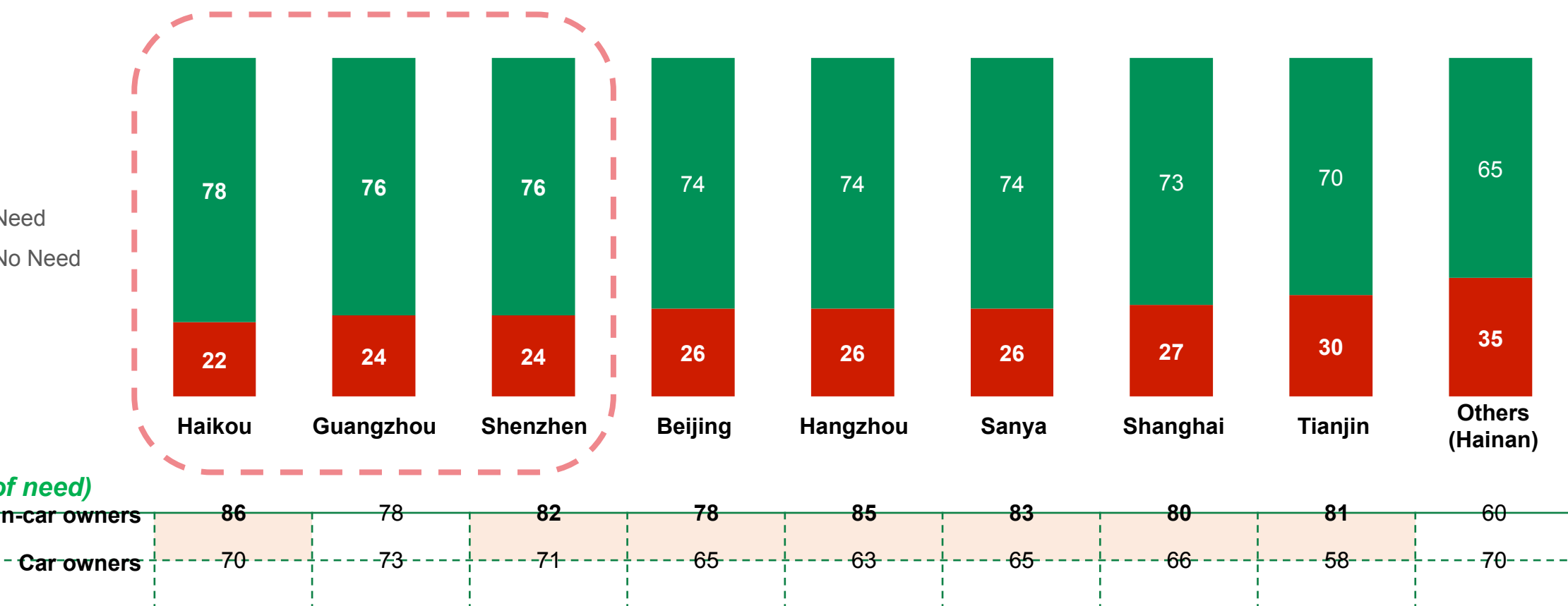
	Beijing		Shanghai		Guangzhou		Shenzhen	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Support public transport instead of restricting car purchase	52	40	42	45	53	55	39	41
For some, some family own many cars while others don't have a chance to buy	59	50	37	26	30	28	42	43
Develop new-energy vehicles to better save energy	30	26	48	38	54	61	27	37
Should support road restriction to improve traffic and cancel purchase restriction	29	40	22	24	37	38	45	31
Should provide more parking lots	20	22	33	34	38	43	23	30
Should control industries emission, which is more effective for pollution control	20	34	24	21	34	31	20	26
Don't believe in climate change	8	4	4	5	11	11	7	3

Car owners in Hangzhou believe that adding parking lots is more effective than restricting car purchase.

	Hangzhou		Tianjin		Haikou		Sanya		Other (Hainan)	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Would support public transport instead of restricting car purchase	48	54	43	40	49	51	38	45	38	35
Or, some family own many cars while others don't have a chance to buy	48	36	41	31	46	29	48	28	25	35
Develop new-energy vehicles to better save energy	41	29	40	30	35	27	29	18	25	55
Would support road restriction to improve traffic and cancel purchase restriction	43	32	29	35	46	31	48	40	38	30
Should provide more parking lots	14	30	35	33	22	26	43	35	25	45
Should control industries emission, which is more effective for pollution control	27	30	26	38	35	37	38	30	13	15
Don't believe in climate change	14	6	6	4	11	7	5	8	-	-

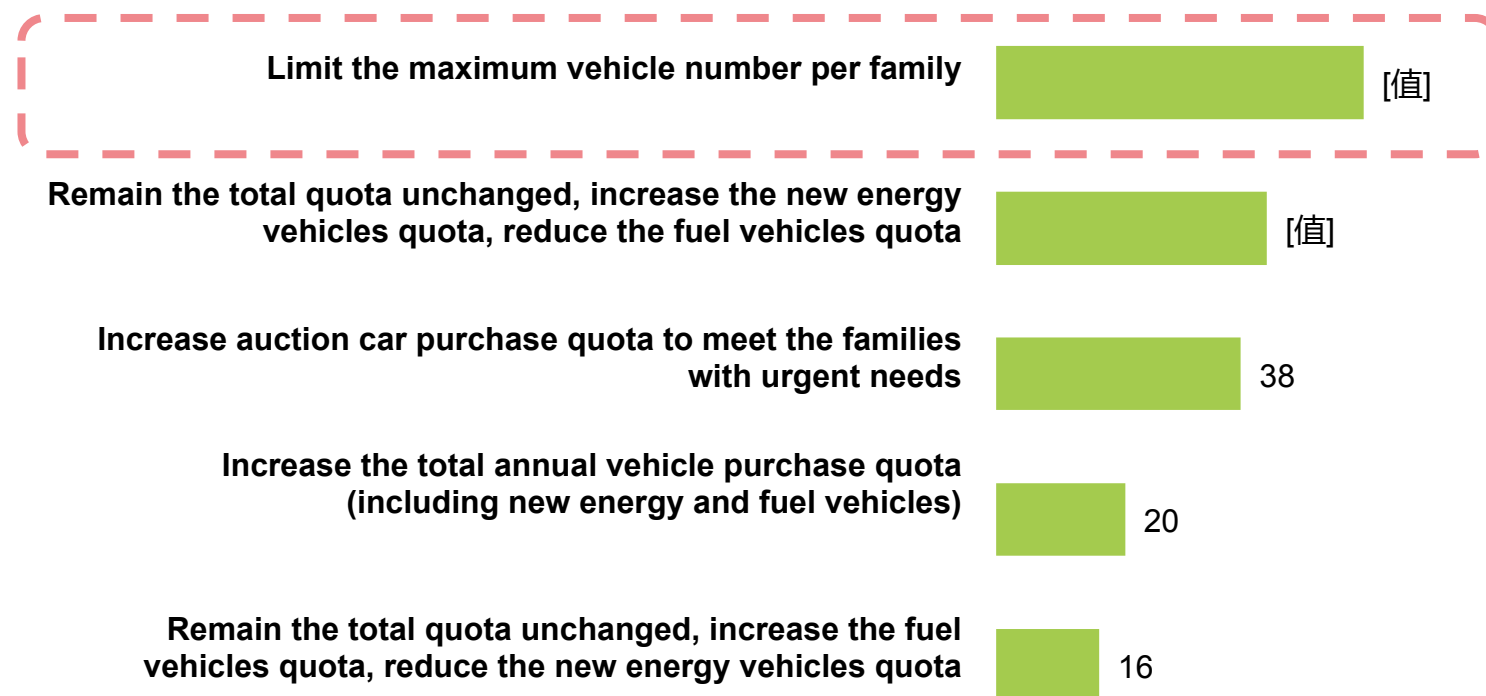
Although the majority believe that car purchase restriction policy is necessary, they still think there are places to improve, especially in Haikou, Guangzhou and Shenzhen.

Whether the car purchase restriction policy needs improving



Residents in Beijing support the car purchase restriction of one family which may be explained by their feeling of unfairness of current situation, which even get a higher support from those families who already have a car.

The incompleteness aspects of car purchase restriction policy (Beijing)



Non-car owners	Car owners
54	65
41	44
38	38
22	16
18	11

Shanghai residents also support the restriction of car purchase per family, especially among car owners. Non-car owners in Shanghai seem to prefer additional quota for lottery purchase.

The incompleteness aspects of car purchase restriction policy (Shanghai)

Limit the maximum vehicle number of one family



[值]

Keep the auction quota unchanged, reduce the criteria of purchasing new energy vehicles



[值]

Keep the auction quota unchanged, increase a small number of additional quota for lottery purchase



38

Increase the auction quota every year

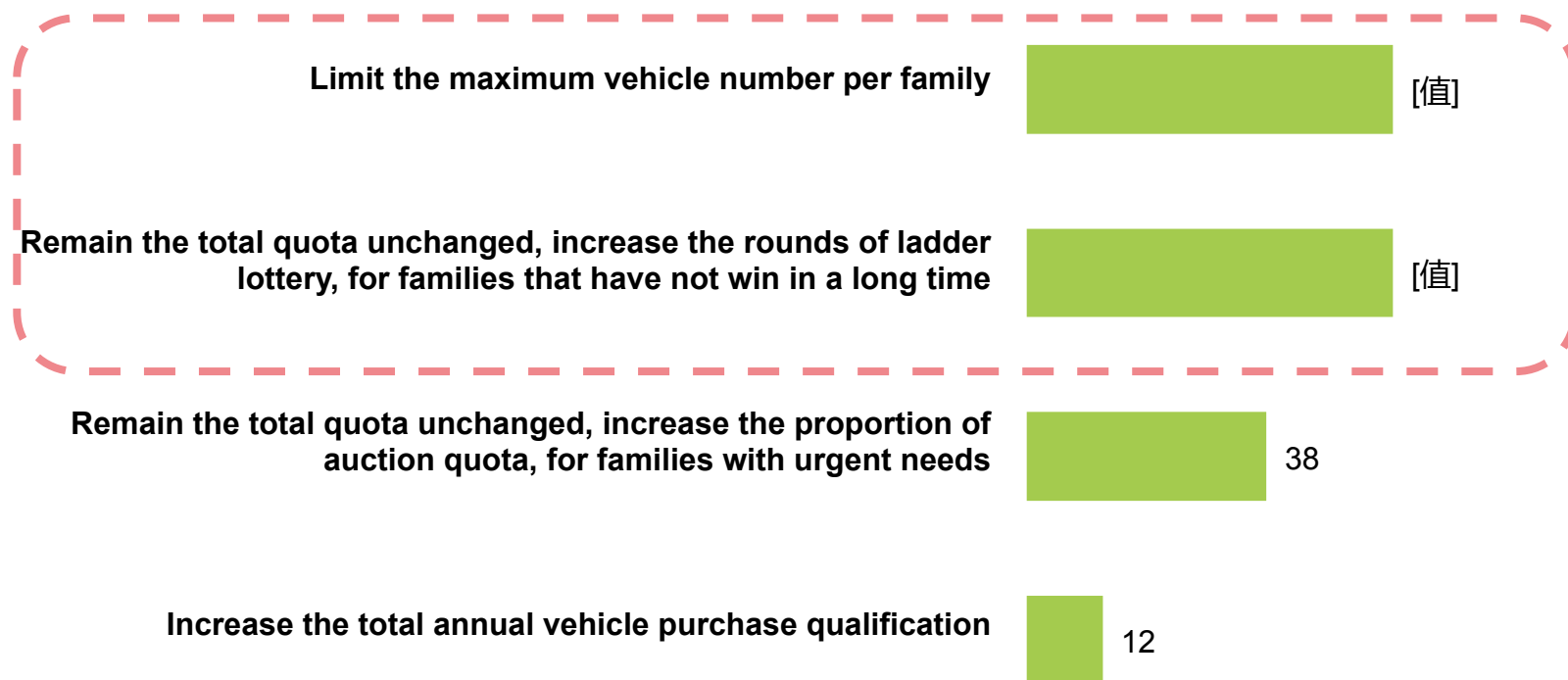


14

Non-car owners	Car owners
56	67
46	44
41	33
13	14

Besides limiting max vehicle number by family, Hangzhou residents also prefer adding rounds of ladder lottery. Adding auction quota is especially supported by non-car owners.

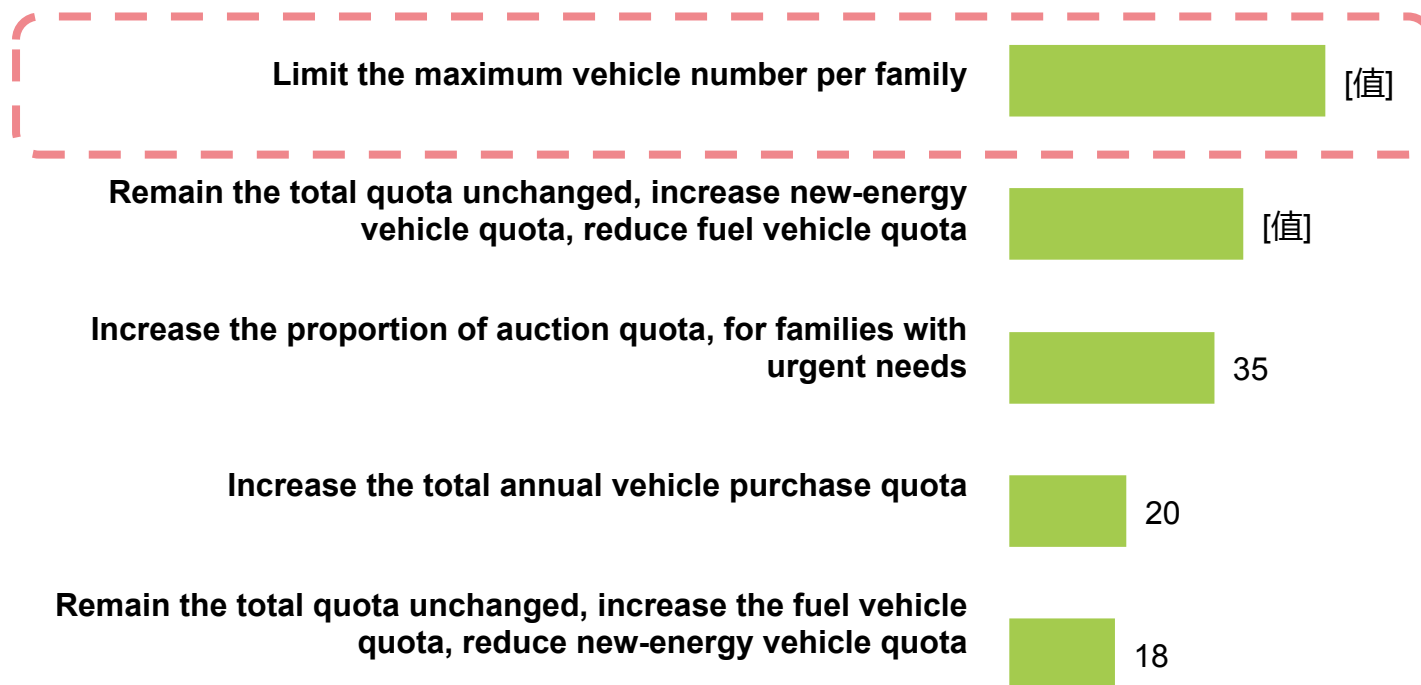
The incompleteness aspects of car purchase restriction policy (Hangzhou)



Non-car owners	Car owners
51	66
58	58
47	27
10	15

Tianjin residents also prefer limiting the max vehicle number per family, especially among car owners. Non-car owners prefer adding auction quota while car owners prefer adding new energy vehicle quota.

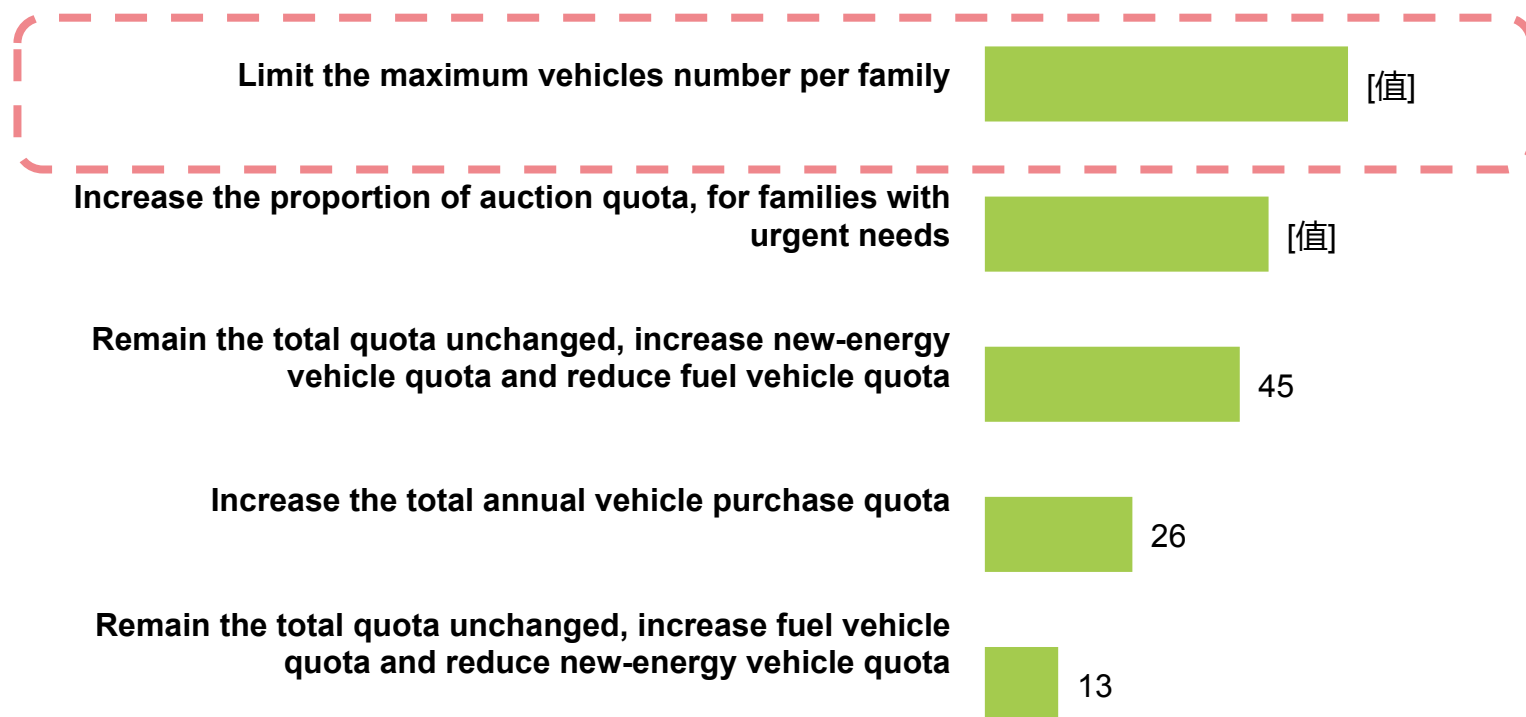
The incompleteness aspects of car purchase restriction policy (Tianjin)



Non-car owners	Car owners
47	61
39	42
43	26
18	23
24	11

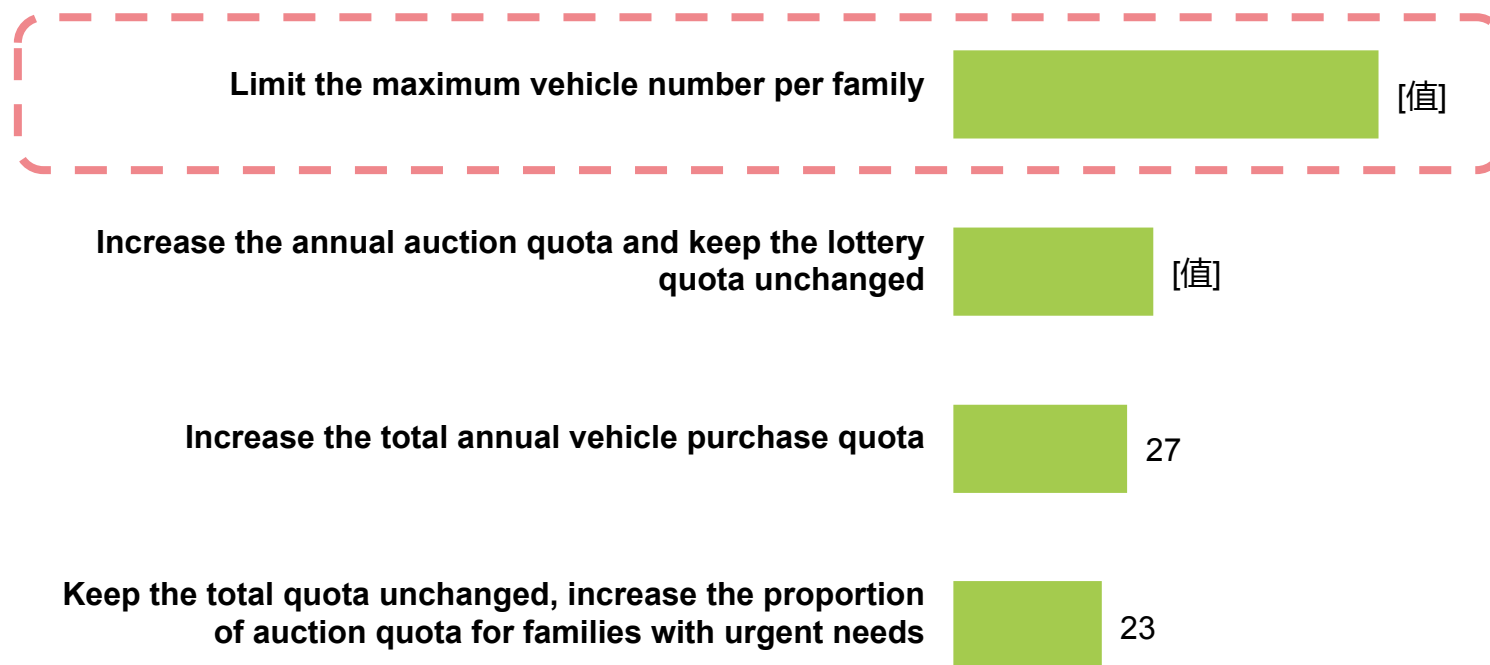
Besides limiting max vehicle number per family, Guangzhou car owners prefer adding auction quota than non car owners.

The incompleteness aspects of car purchase restriction policy (Guangzhou)



Shenzhen residents show a higher support for limiting vehicle number per family than other ways of improvements, especially among car owners.


The incompleteness aspects of car purchase restriction policy (Shenzhen)



Non-car owners	Car owners
59	72
35	26
27	26
26	20

Hainan residents also favor limiting car purchase number per family the most. Haikou residents show a slightly higher support for control total quota.

The incompleteness aspects of car purchase restriction policy (Hainan)



	Hainan (Total)	Haikou	Sanya	Others (Hainan)
Limit the maximum vehicle number per family	55	53	59	53
The total quota is more than actual demand, proper control is needed to reduce irrational car purchase	42	46	35	30
Increase the total annual vehicle purchase quota	21	19	24	28
Keep the total quota unchanged, issue auction policy as soon as possible, allocate some quota as auction	15	15	15	13

Car owners in Haikou and Sanya have a higher support for limiting vehicle number per family, compared with other cities in Hainan.

	Haikou		Sanya		Others (Hainan)	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Limit the maximum vehicle number per family	42	62	50	69	61	45
The total quota is more than actual demand, proper control is needed to reduce irrational car purchase	45	47	33	37	22	36
Increase the total annual vehicle purchase quota	20	17	24	25	28	27
If the total quota unchanged, issue auction policy as soon as possible, allocate some quota as auction	23	8	19	10	17	9

1. In general, more than 60% of the residents in the cities consider the car purchase restriction necessary and they tend to support limiting car purchase number per family.
2. Relieving the environmental problems is the most considered element, and residents agree green or public transportation or new-energy vehicle can be a better way to solve the problem.
3. The reason for opposing the policy is mostly because they believe there can be other ways to control the negative effects of car purchasing like environmental problems and traffic congestion.
4. Fairness is a vital element when residents in these cities consider car purchase restriction, still most residents with no car tend to support the policy even when they want a car.



**ATTITUDE TOWARD
RESTRICTION ON CAR
PURCHASE**



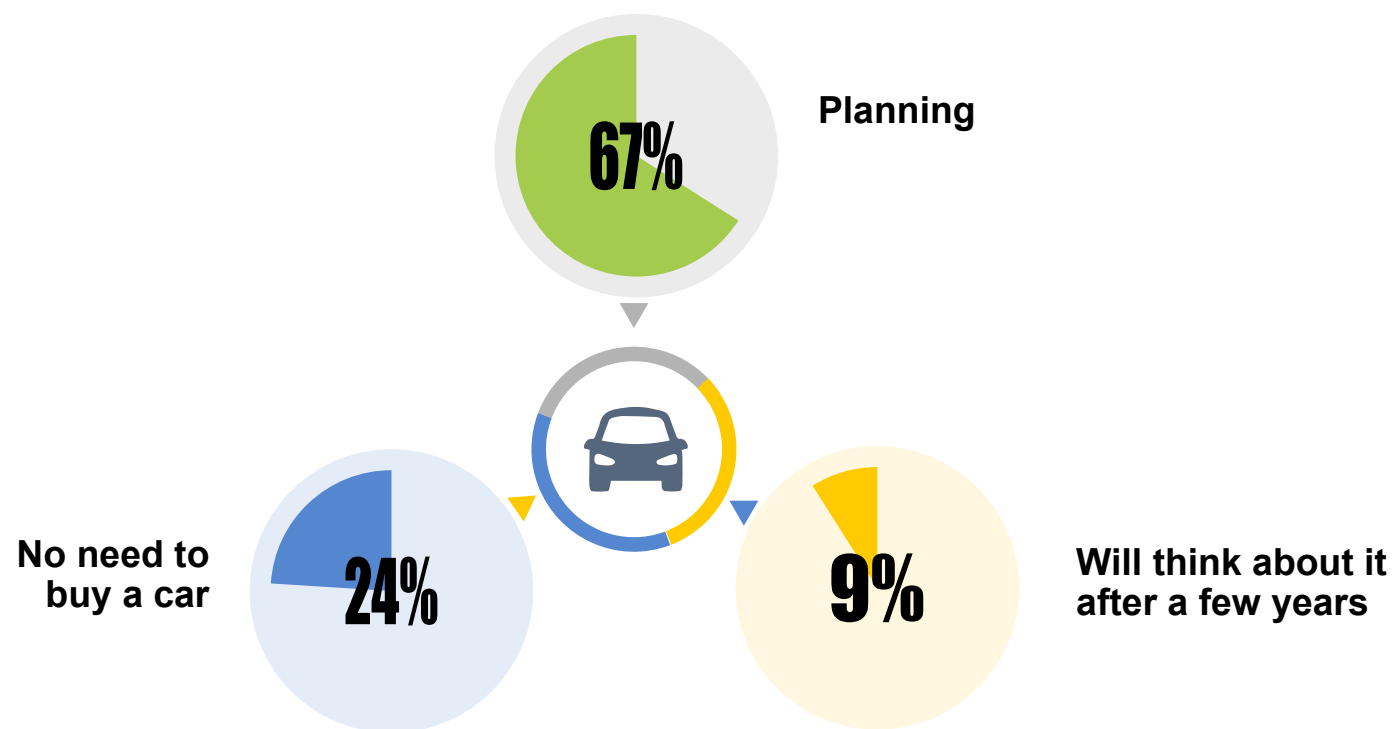
**ATTITUDE TOWARD
RESTRICTION ON CAR
OWNERSHIP**



**ATTITUDE TOWARD
RESTRICTION ON
TRAFFIC CONTROL**

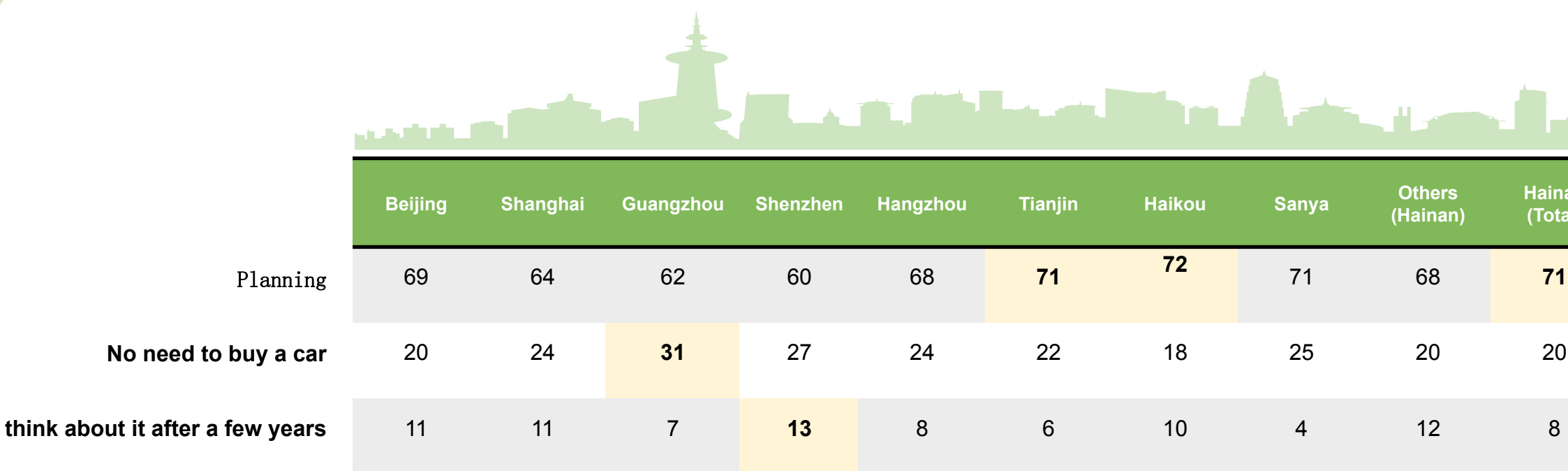
% of the respondent who do not own a car are considering to buy a car recently.

The Willingness of Buying a Car

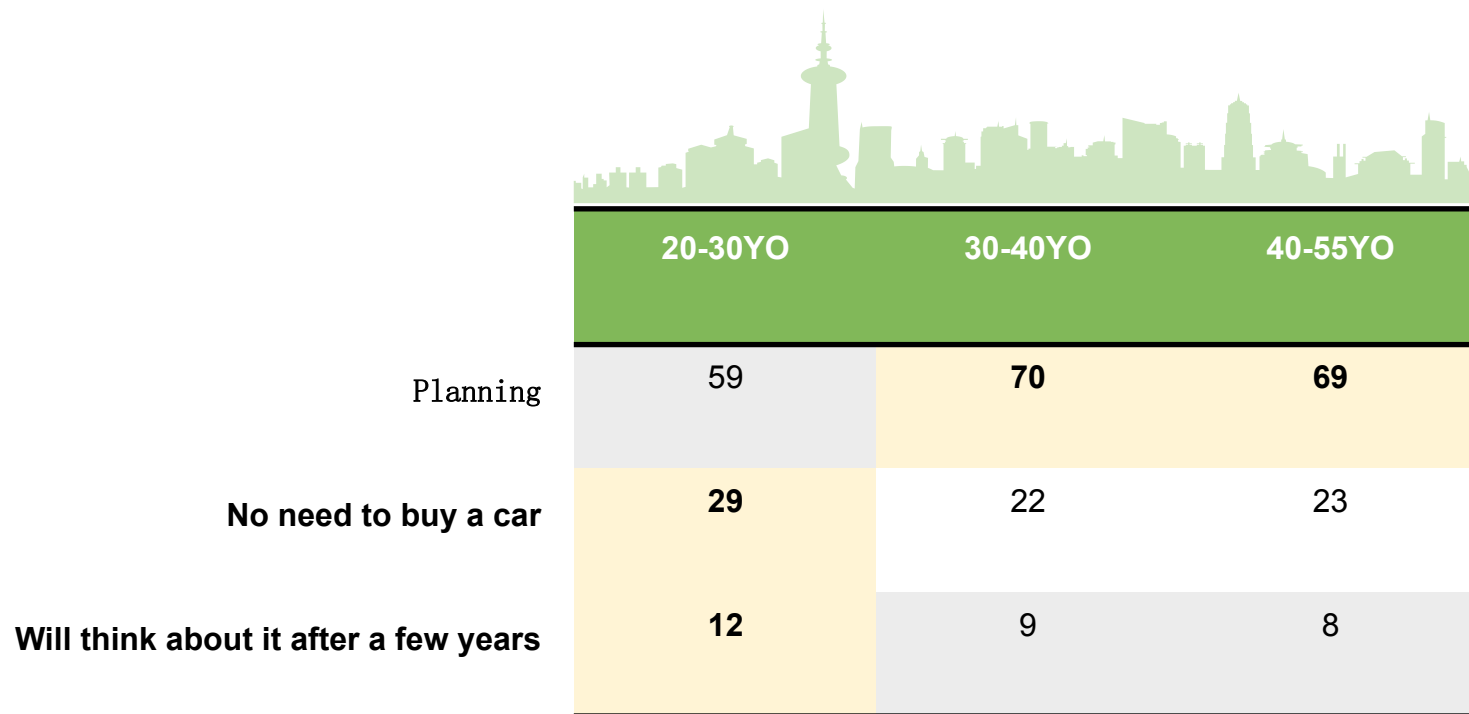


More residents in Tianjin and Haikou are considering buying a car. Residents in Guangzhou are least considering purchasing a car and Shenzhen residents postpone the issue to the future.

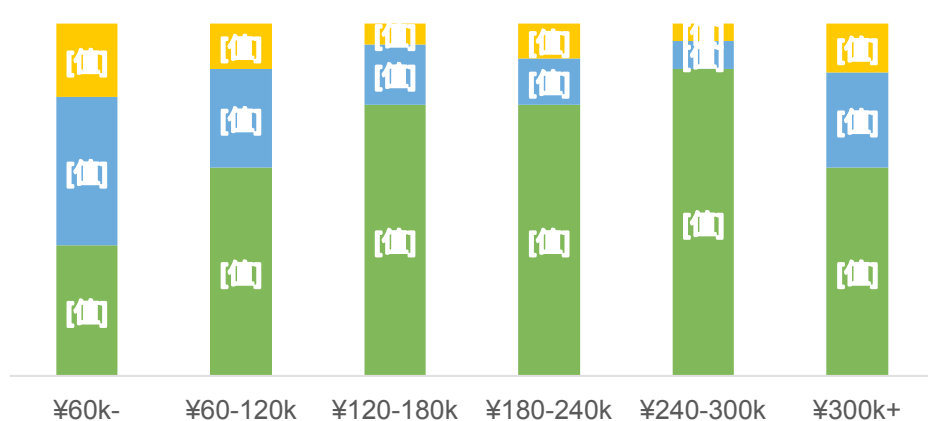
%



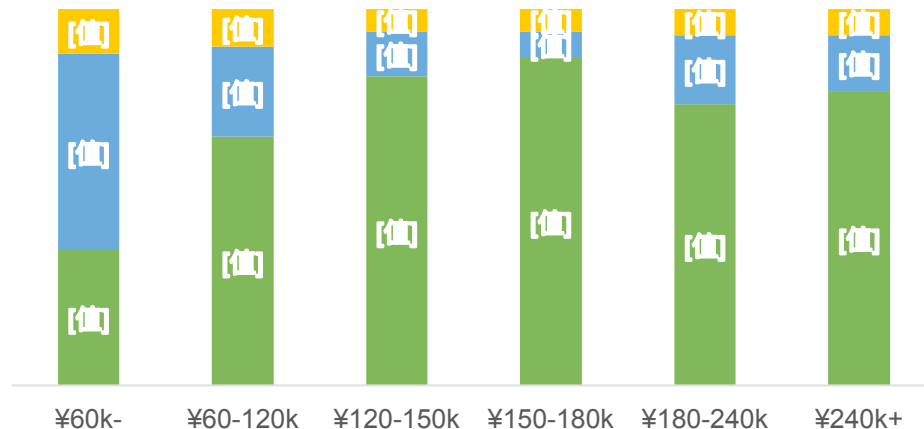
After entering middle age, the willingness to purchase a car is higher. Less younger respondents (below 30 years old) have the plan of getting a car recently.



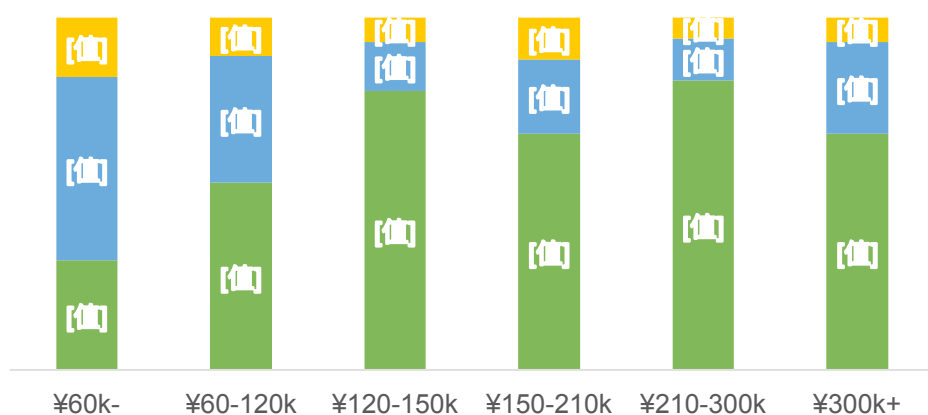
Rate of planning to purchase rises when income increases. In Hainan, the ratio of planning reaches a high level when the income is larger than 60k, while in other cities this number is 100k. Less residents in Beijing and Shanghai are planning to buy a car.



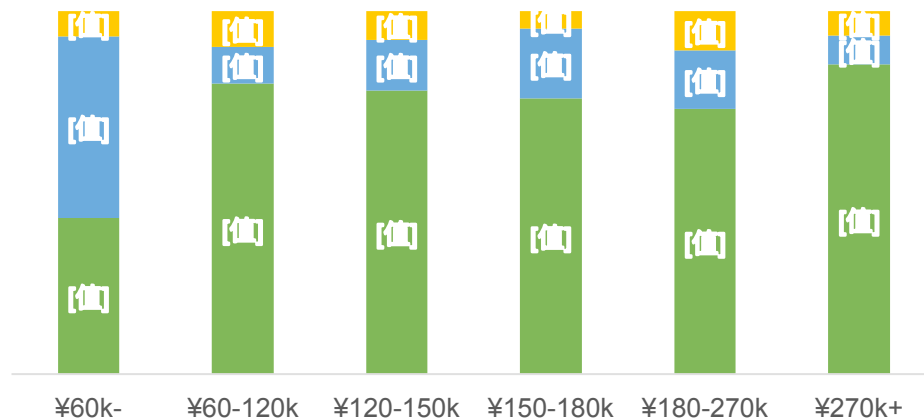
Beijing & Shanghai



Tianjin & Hangzhou



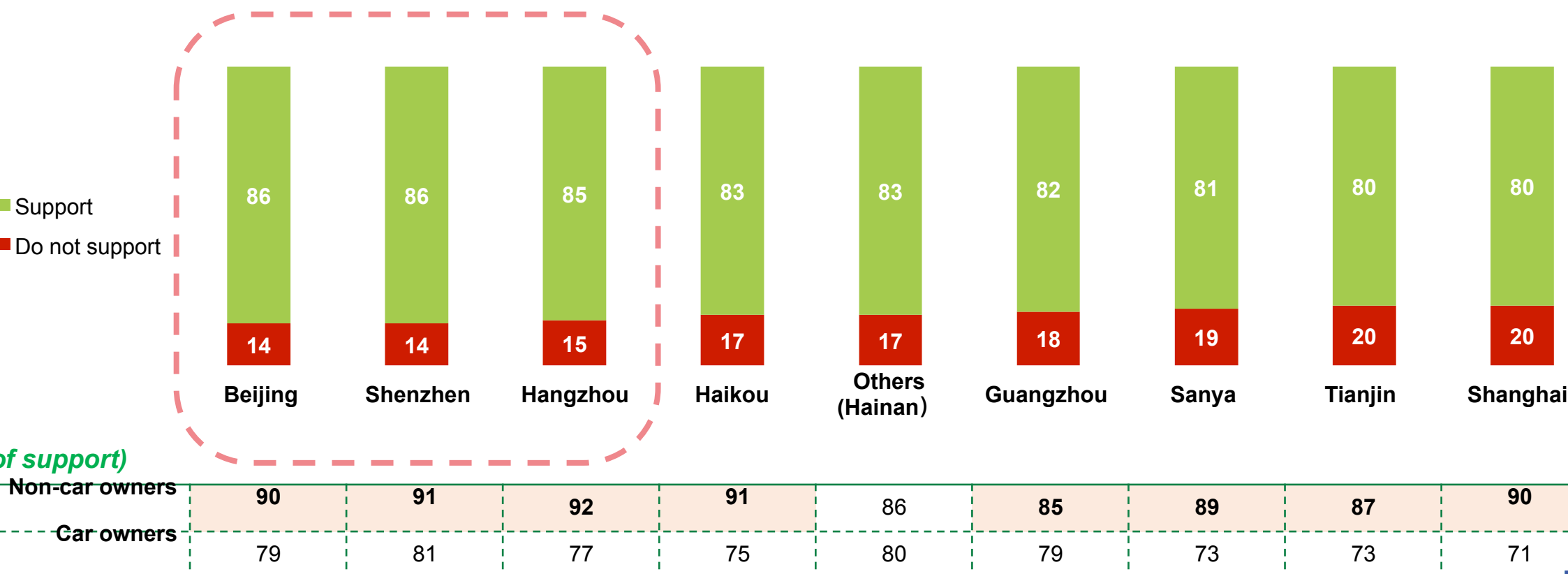
Guangzhou & Shenzhen



Hainan

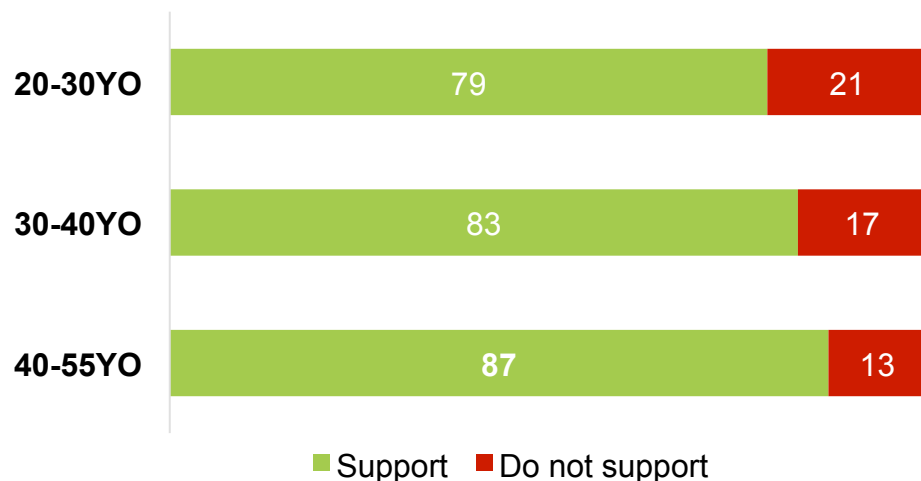
The public give high support for restricting number of cars owned by each family, especially residents in Beijing, Shenzhen, and Hangzhou. Non-car owners have a higher support rate than car owners in almost each city.

Whether to restrict the vehicle number owned by families

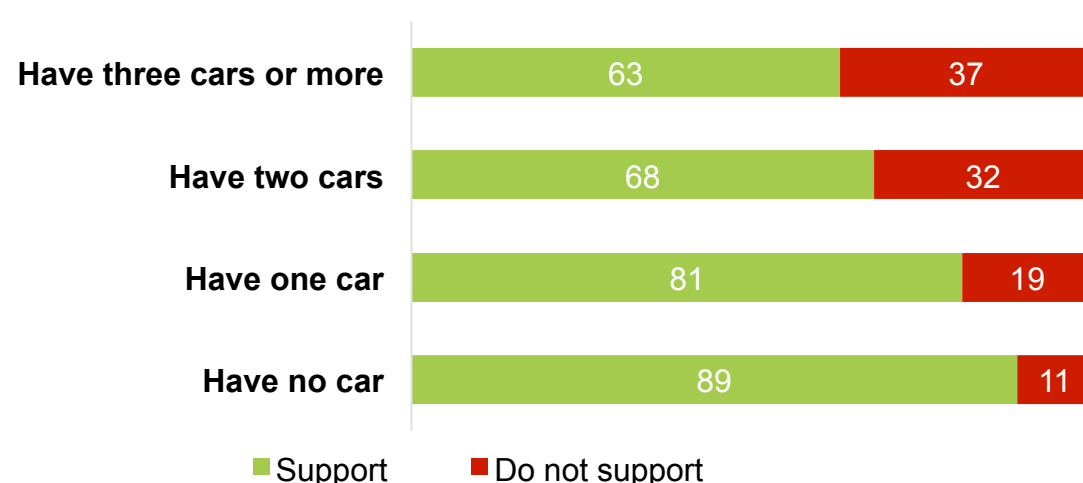


Support rate increases with age. And the less car one family has, the more they tend to support the restriction.

Whether to restrict the vehicle number owned by families




Whether to restrict the vehicle number owned by families



Early 80% of the respondents prefer restricting the number of cars within 1-2 cars. Residents in Hainan support one car more than two, while residents in other cities show an opposite trend.


Preferred Number of Restricted Cars



	Total	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Tianjin	Haikou	Sanya	Others (Hainan)	Hainan (Total)
Only one car	38	38	37	36	39	36	38	42	45	39	40
Only two cars	40	38	40	40	40	42	42	38	38	37	38
More than 3 cars	22	24	23	24	21	22	20	20	17	24	22

Non-car owners believe that one car per family is enough. However, those who already have one car want at least two cars per family, while those who have two or more cars per family want a higher number.

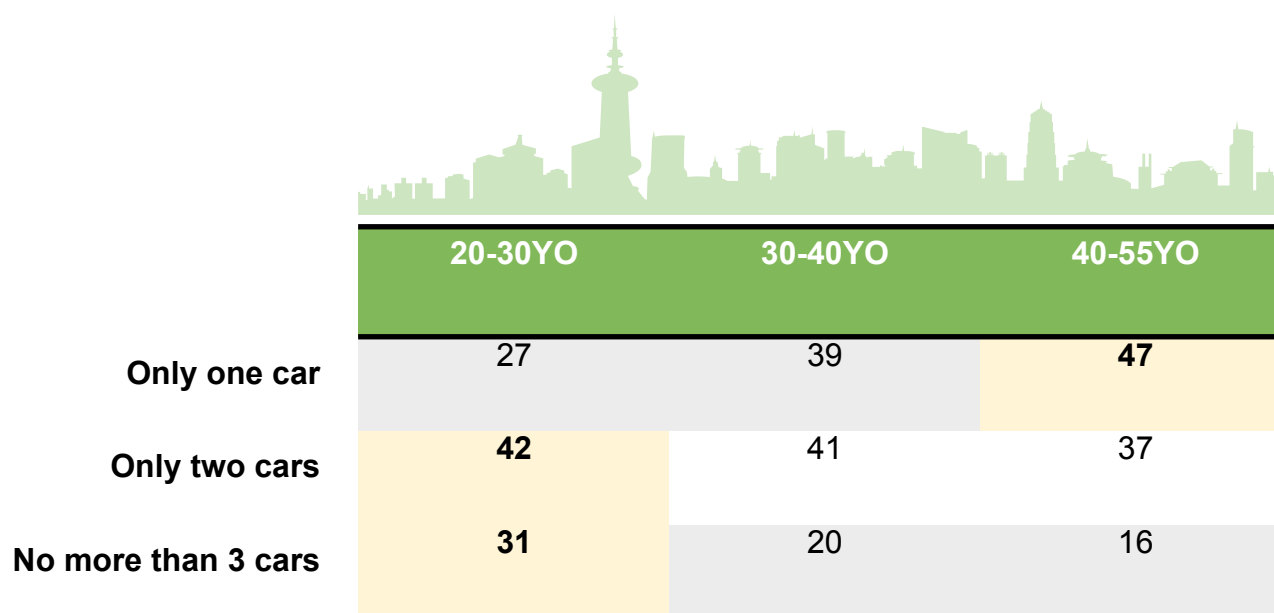
Preferred Number of Restricted Cars



	Non-car owners	Car owners	Have one Car	Have two Cars	Have three Cars or more
Only one car	50	23	30	9	5
Only two cars	34	48	47	52	40
No more than 3 cars	16	29	24	39	54

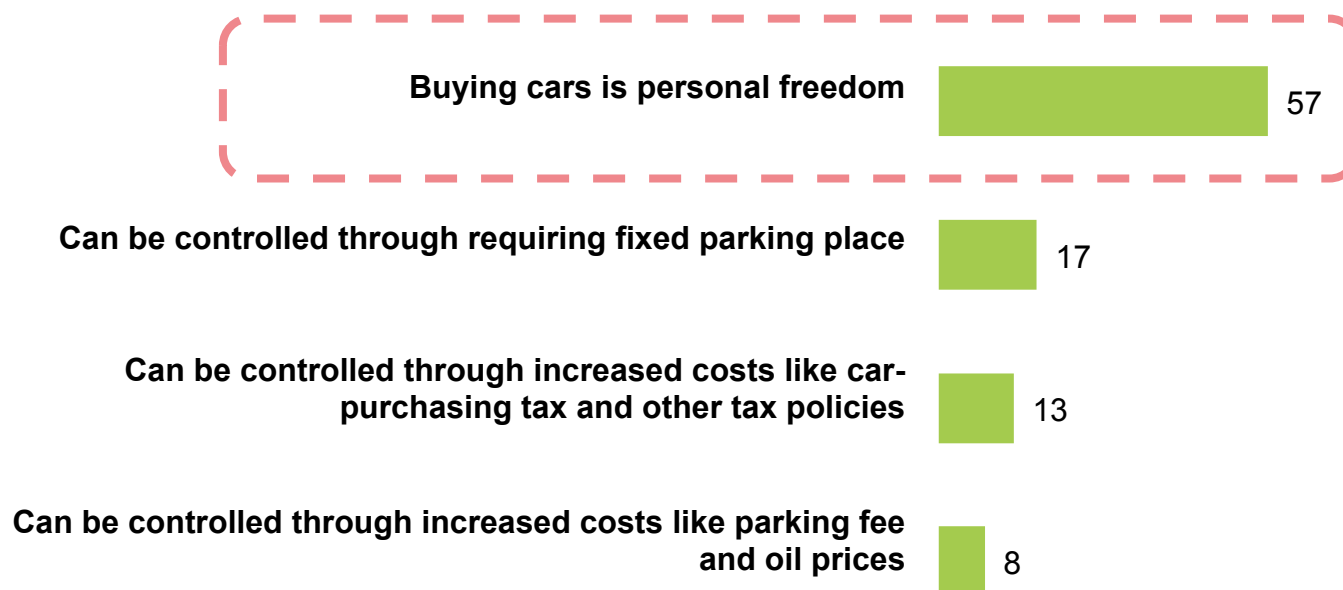
Younger families want more cars in their families. Respondents around 40-55 years old are more likely to agree restricting one car.

Preferred Number of Restricted Cars




The main reason that respondents do not want to restrict the car number because they feel a violation of personal freedom.

Reasons For Not Supporting Car Purchase Control



Beijing residents show a higher support for control car purchase through fixed parking lot.

Reasons For Not Supporting Car Purchase Control



	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Tianjin	Haikou	Sanya	Others (Hainan)	H (T)
Buying cars is personal freedom	45	69	53	57	58	58	57	49	71	
Should be controlled through requiring fixed parking place	25	10	20	16	18	20	8	16	12	
Should be controlled through increased costs like car-purchasing tax and other tax policies	9	13	15	10	14	11	19	16	12	
Should be controlled through increased costs like parking fee and oil prices	9	7	8	12	5	7	6	7	-	

1. The willingness to purchase a car increases with age, especially for the family that have no car.
2. The preferred restrict number has a strong relationship with the possessed car number: Half of the respondents who already have had cars tend to prefer the number of cars they have. Those families who have not got cars yet tend to prefer the one car restriction most.
3. The main reason for opposing car purchase number per family restriction is that respondents consider it a violation of personal freedom, and most people among them who already have cars are unwilling to give up the cars they have already had.



**ATTITUDE TOWARD
RESTRICTION ON CAR
PURCHASE**



**ATTITUDE TOWARD
RESTRICTION ON CAR
OWNERSHIP**

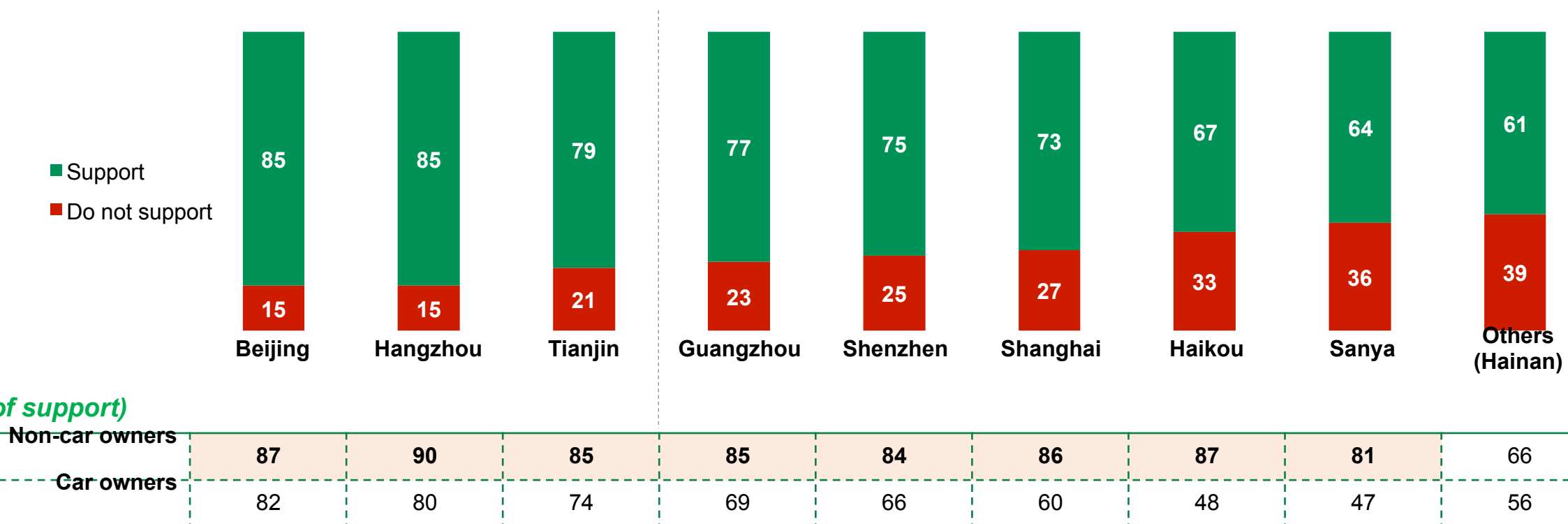


**ATTITUDE TOWARD
RESTRICTION ON
TRAFFIC CONTROL**

Traffic control policy is welcomed by the public, especially in cities which have already implemented such policy. Residents in cities of Hainan province have a much lower support rate. Obviously, car owners show much less support for traffic control policy.

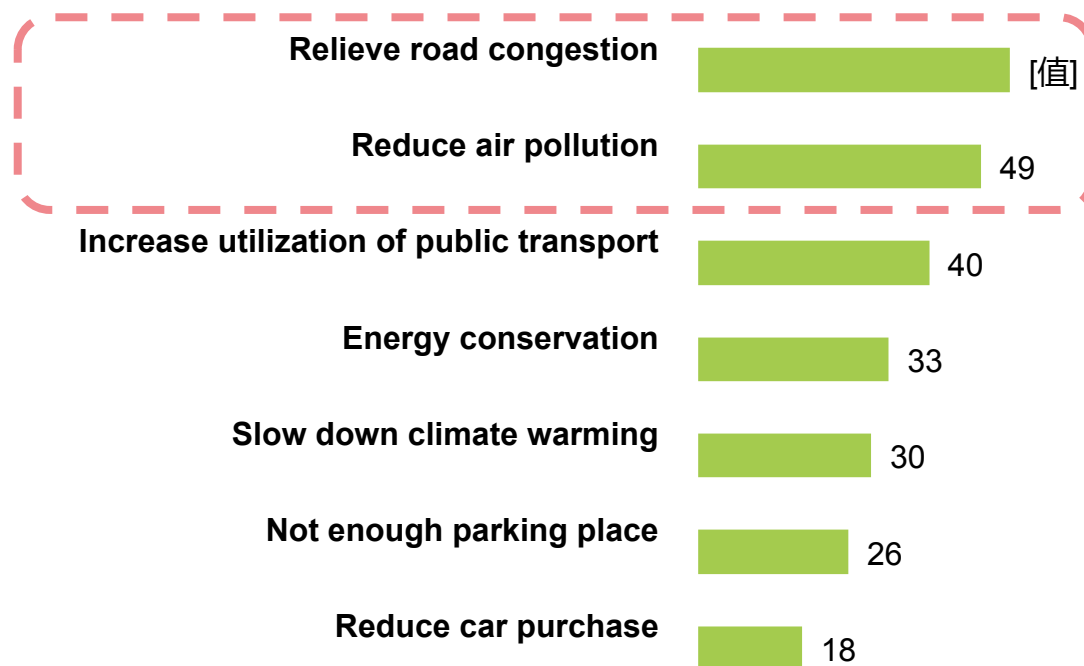


Support of Traffic Control During Weekdays



The major reason for supporting traffic control policy is to relieve road congestion and reduce air pollution.

Reasons for Supporting Traffic Control




Car owners care more about relieving road congestion and parking, while people with no car care more about energy conservation and climate warming.



	Non-car owners	Car owners	Have one Car	Have two Cars	Have three Cars or more
Relieve road congestion	48	62	61	65	58
Reduce air pollution	49	50	52	49	38
Increase utilization of public transport	40	42	45	36	31
Energy conservation	35	31	31	29	28
Slow down climate warming	33	27	27	26	29
Not enough parking place	25	28	27	31	29
Reduce car purchase	23	12	12	9	13

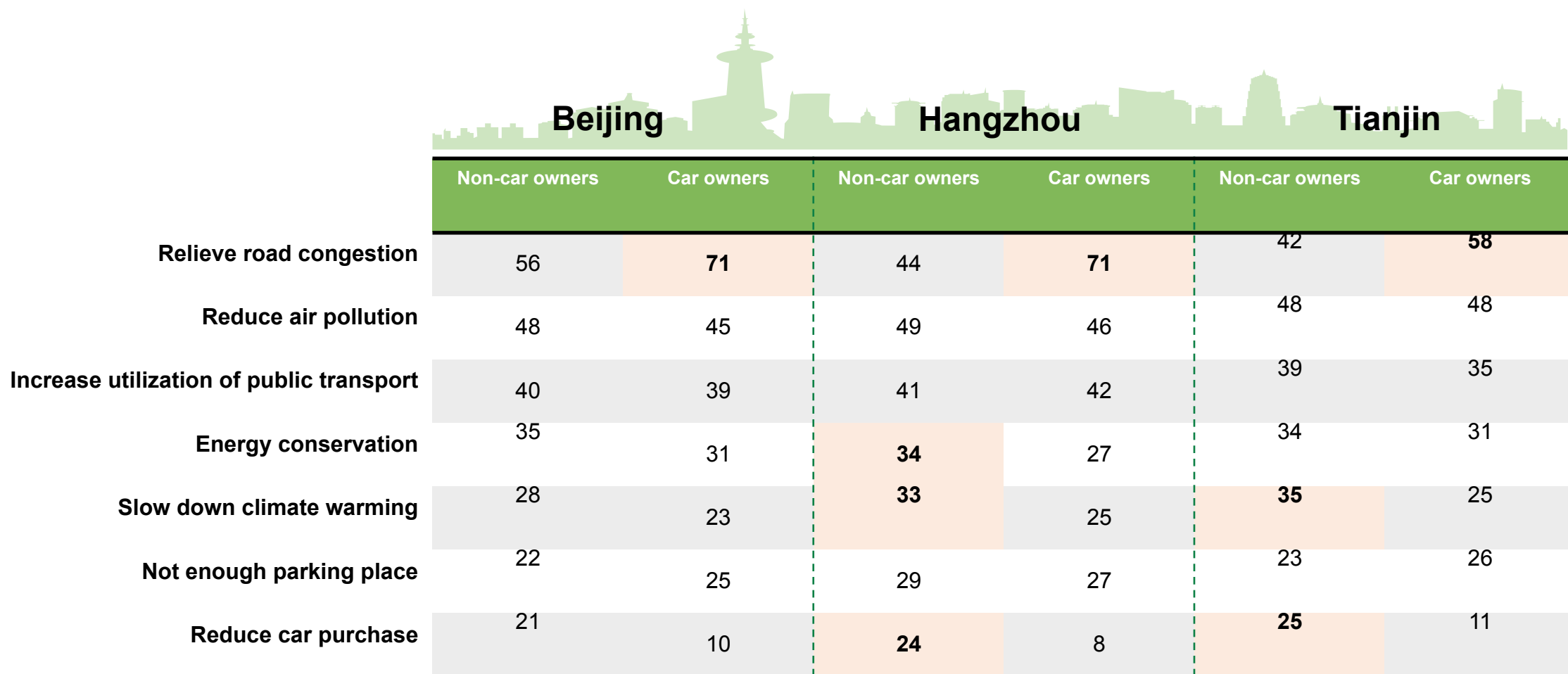
Residents in Beijing support such policy because they are most bothered by traffic jam.
 Guangzhou show more attention to air pollution, energy conservation and climate warming.
 More Hainan residents want to control car purchase by such policy.

%




	Beijing	Hangzhou	Tianjin	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Others (Hainan)	Hainan (Total)
Relieve road congestion	61	57	49	54	56	55	43	44	36	43
Reduce air pollution	47	48	48	50	56	51	43	49	39	44
Efficient utilization of public transport	40	42	38	40	44	43	39	34	31	37
Energy conservation	34	30	33	33	37	32	31	33	31	32
Slow down climate warming	26	29	31	32	34	29	29	31	33	30
Not enough parking place	23	28	25	27	28	27	24	31	25	26
Reduce car purchase	17	17	19	17	17	18	23	20	28	23

Car owners in Beijing, Hangzhou and Tianjin support the traffic control policy mainly due to the purpose of relieving road congestion. Non-car owners in Hangzhou and Tianjin care more about energy saving and climate warming than car owners, as well as car number control.




Shanghai non-car owners show more attention to climate warming and energy conservation, while Guangzhou and Shenzhen non-car owners show no such pattern.



	Shanghai		Guangzhou		Shenzhen	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Relieve road congestion	52	57	51	62	49	62
Reduce air pollution	50	51	53	59	51	51
Increase utilization of public transport	38	43	42	46	42	45
Energy conservation	37	28	36	37	35	28
Slow down climate warming	37	25	34	35	30	28
Not enough parking place	24	31	28	29	24	31
Reduce car purchase	22	10	20	14	21	14

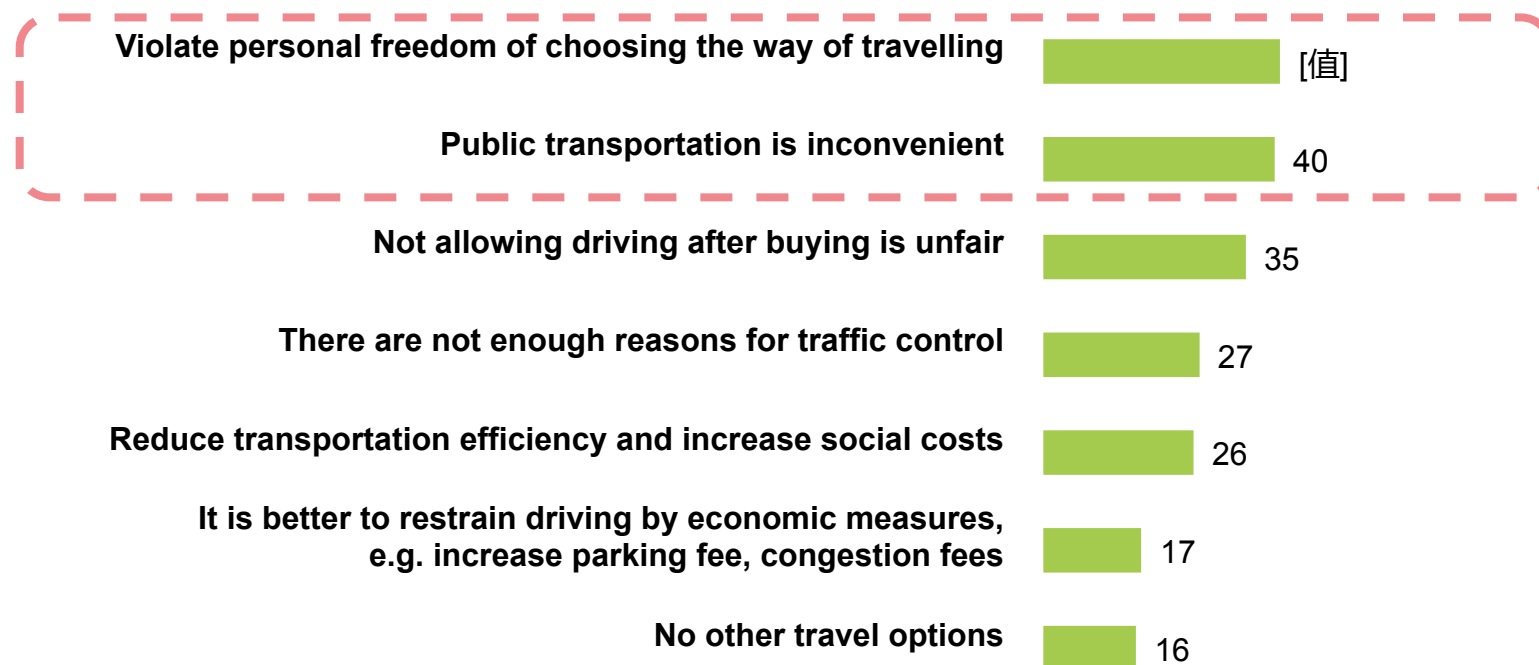
The wish of control car purchasing by traffic control policy mainly come from non-car owners among Hainan residents.



	Haikou		Sanya		Others(Hainan)	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Relieve road congestion	39	51	39	52	36	36
Reduce air pollution	39	49	46	55	39	39
Increase utilization of public transport	38	40	31	39	27	36
Energy conservation	30	34	36	28	27	36
Slow down climate warming	31	26	31	31	30	36
Not enough parking place	23	27	31	30	30	18
Reduce car purchase	28	15	25	11	36	18

Violation of freedom and inconvenient public transportation are the most concerned reasons of those who do not support traffic control.

Reasons for Not Supporting Traffic Control



Residents in Beijing think that the public transportation is inconvenient. Those in Guangzhou show no support for such policy because they cannot find enough reasons and they feel violation of personal freedom.

	Beijing	Hangzhou	Tianjin	Shanghai	Guangzhou	Shenzhen	Haikou	Sanya	Others (Hainan)	Ha (T)
Violate personal freedom of choosing the way of travelling	31	33	41	44	52	47	36	37	33	3
Public transportation is inconvenient	49	43	40	30	44	38	42	42	44	4
Not allowing driving after buying is unfair	37	28	40	37	40	26	37	39	36	3
There are not enough reasons for traffic control	23	21	23	25	46	20	30	29	26	2
Reduce transportation efficiency and increase social costs	23	31	23	25	35	23	24	31	15	2
It is better to restrain driving by economic measures	20	24	15	13	21	18	13	14	18	
No other travel options	14	11	19	14	18	17	18	15	21	

Beijing and Tianjin car owners think that the public transportation is inconvenient so that they show no support for traffic control. Hangzhou non-car owners tend to think restraining driving by economic measure a better method instead of traffic restriction.

	Beijing		Hangzhou		Tianjin	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Violate personal freedom of choosing the way of travelling	34	28	40	30	38	43
Public transportation is inconvenient	44	56	44	43	31	45
Not allowing driving after buying is unfair	37	36	28	28	44	38
There are not enough reasons for traffic control	24	21	32	16	34	16
Reduce transportation efficiency and increase social costs	20	28	24	35	21	25
It is better to restrain driving by economic measures	24	15	36	18	19	13
No other travel options	15	13	4	15	22	17

Non-car owners in Shanghai also show support for economic measures instead of traffic control policy. Meanwhile the car owners in Guangzhou expect more sufficient reasons for the policy. Shenzhen car owners worry about the inconvenience of public transportation.

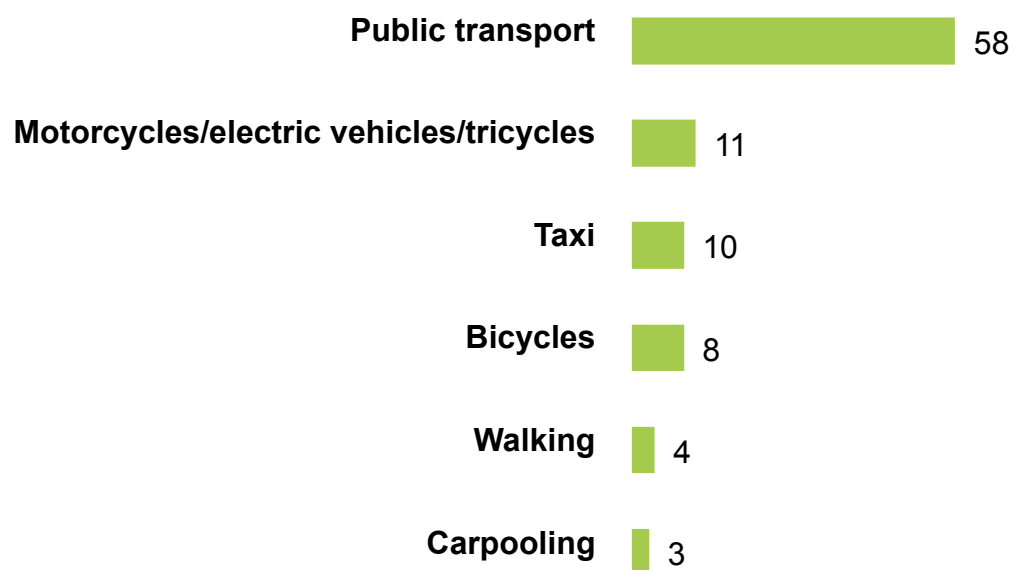
	Shanghai		Guangzhou		Shenzhen	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Violate personal freedom of choosing the way of travelling	36	46	53	52	43	49
Public transportation is inconvenient	25	32	42	45	30	43
Not allowing driving after buying is unfair	46	34	39	40	27	25
There are not enough reasons for traffic control	31	23	35	52	16	22
Reduce transportation efficiency and increase social costs	29	23	43	32	20	24
It is better to restrain driving by economic measures	21	11	23	21	17	18
No other travel options	17	13	15	19	15	18

Non-car owners in Haikou and Sanya feel that it is unfair to not allow driving after purchasing. And the car owners show no support because a worry of inconvenient public transportation.

	Haikou		Sanya		Others(Hainan)	
	Non-car owners	Car owners	Non-car owners	Car owners	Non-car owners	Car owners
Violate personal freedom of choosing the way of travelling	46	34	43	35	24	41
Public transportation is inconvenient	31	45	25	48	59	32
Not allowing driving after buying is unfair	46	34	54	34	47	27
There are not enough reasons for traffic control	21	32	39	25	29	23
Reduce transportation efficiency and increase social costs	31	22	43	26	24	9
It is better to restrain driving by economic measures	28	9	14	14	24	14
No other travel options	18	18	18	14	12	27

On the day of vehicle tail number restriction, public transport is the important choice of traveling, such as subway and bus. Bicycles and taxi are more often used in Tianjin.

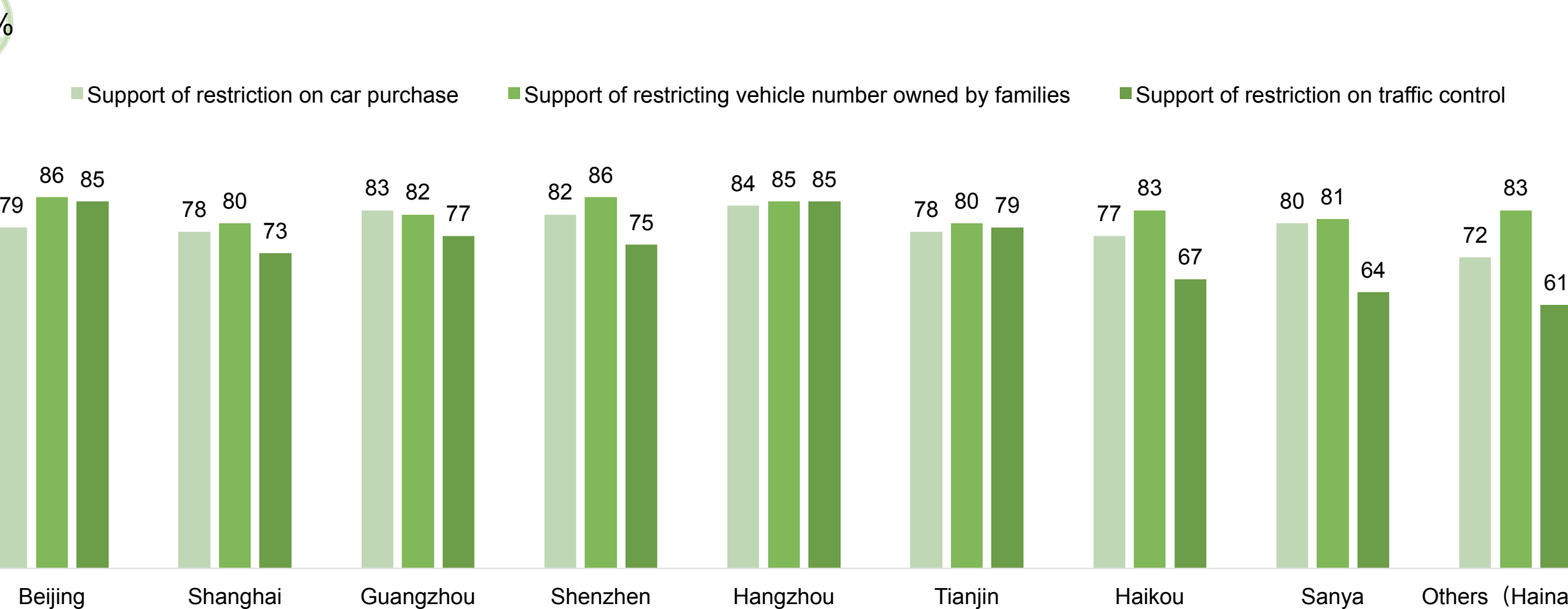
Alternative plan on the day of traffic control



	Beijing	Hangzhou	Tianjin
Public transport	62	57	50
Motorcycles/electric vehicles/tricycles	6	11	9
Taxi	7	11	13
Bicycles	9	7	12
Walking	3	4	4
Carpooling	2	3	4

1. Relieving road congestion is considered as the main reason that quite a few people support traffic control, especially people in megacities, followed by environmental protection.
2. Car owners and non owners have different reasons that support traffic control. Car owners care more about relieving road congestion and parking, while people with no cars care more about energy conservation and climate warming.
3. Violation of freedom is the main reason that respondents oppose of the policy, the inconvenient public transportation is also part of the reason.
4. Residents in cities where traffic restriction policy has already implemented tend to use public transportation as the alternative of driving.

Attitude Toward Policies On Road Restriction



Part 04

DRIVING HABIT & ATTITUDE TOWARD PLATE BUYBACK

% of the car owners drive at least once per week, more than half of the car owners drive most everyday.

Driving Frequency

Drive frequently

Almost every day [值]

3-4 days per week 16

1-2 days per week 13

80%

Drive infrequently

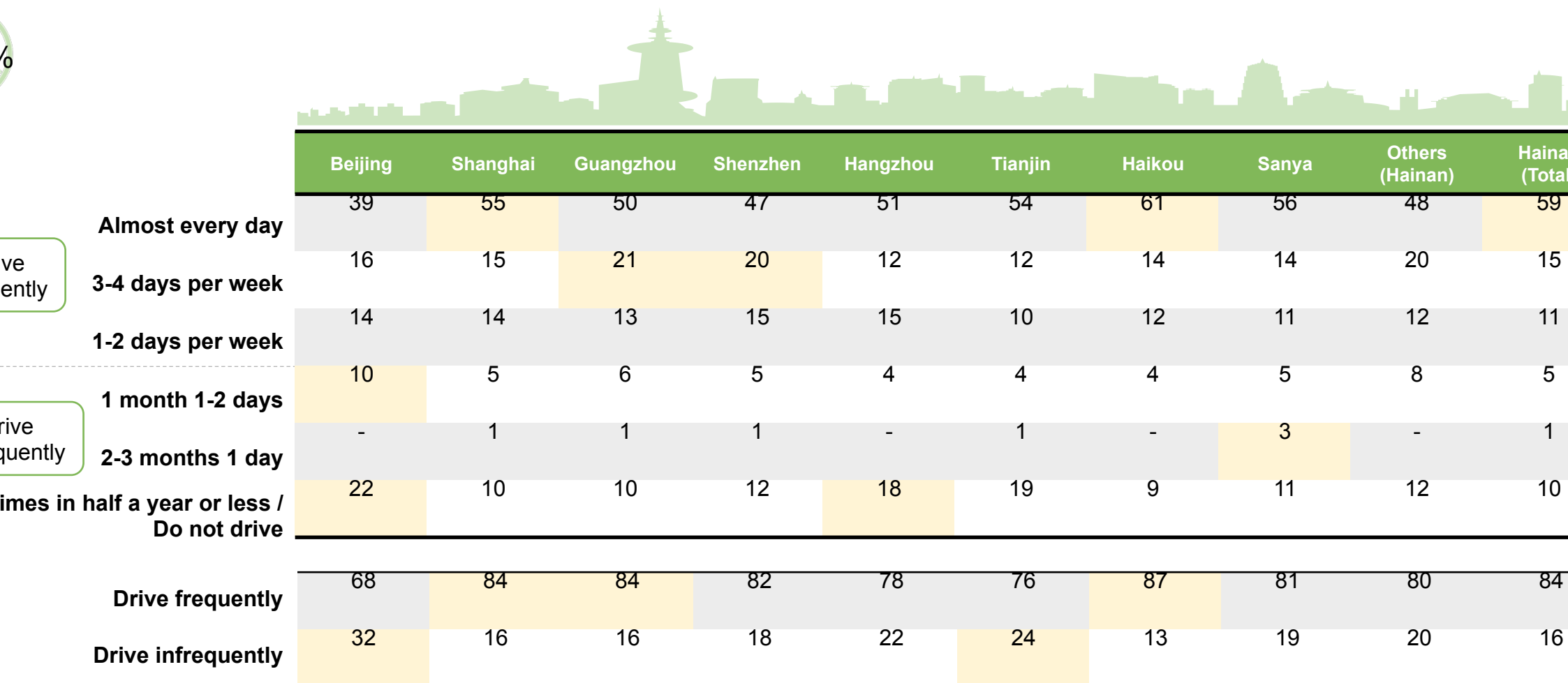
1 month 1-2 days 5

2-3 months 1 day 1

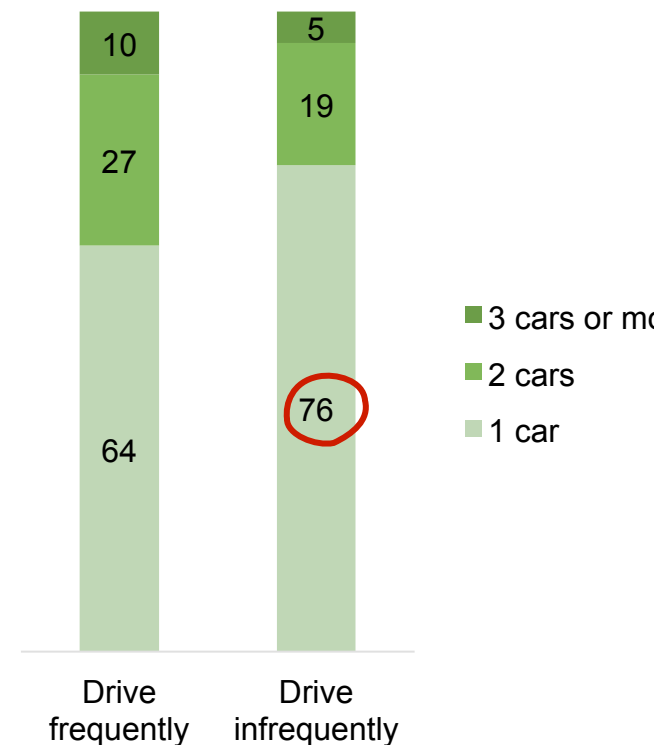
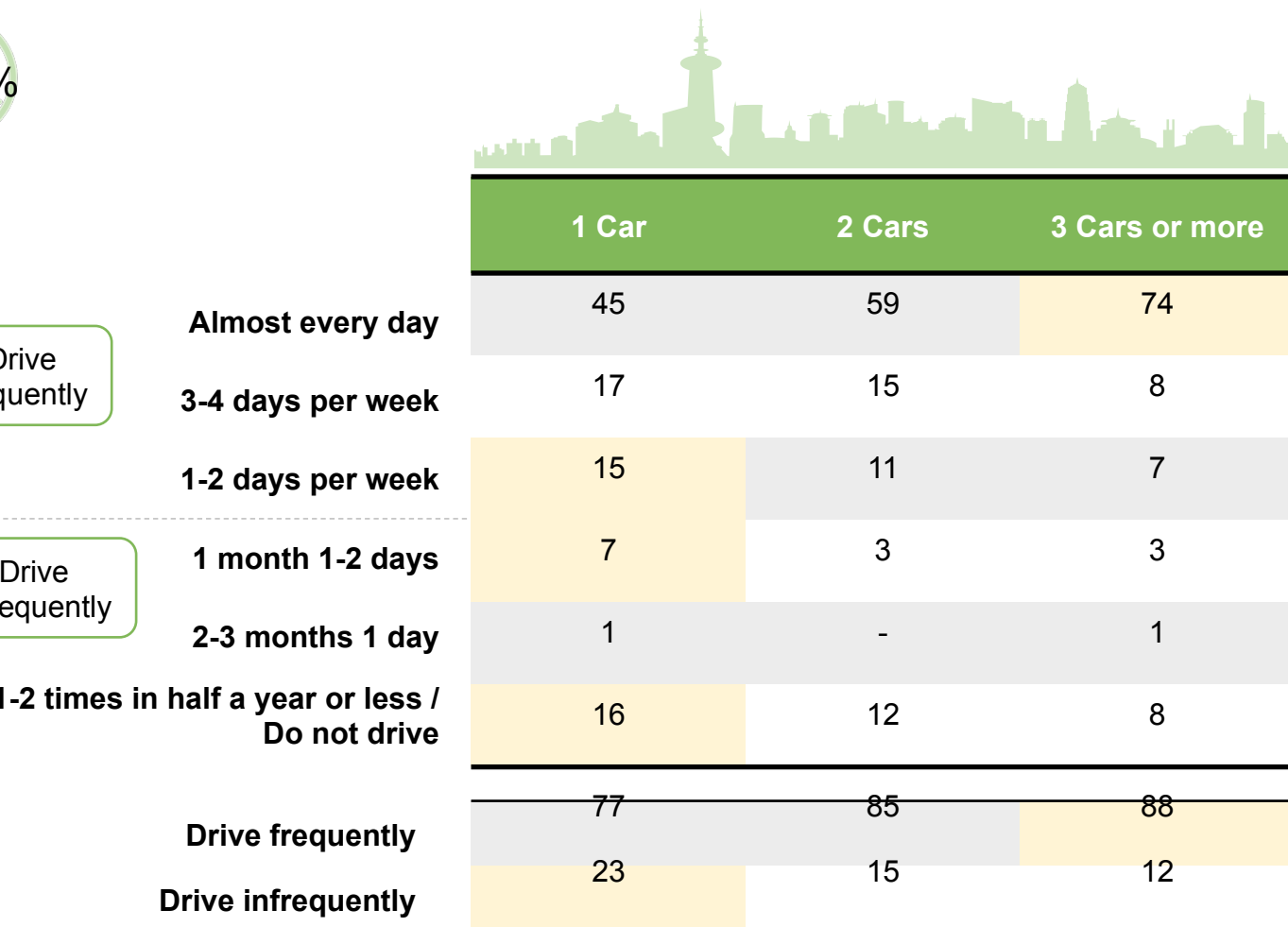
1-2 times in half a year or less /
Do not drive 14

20%

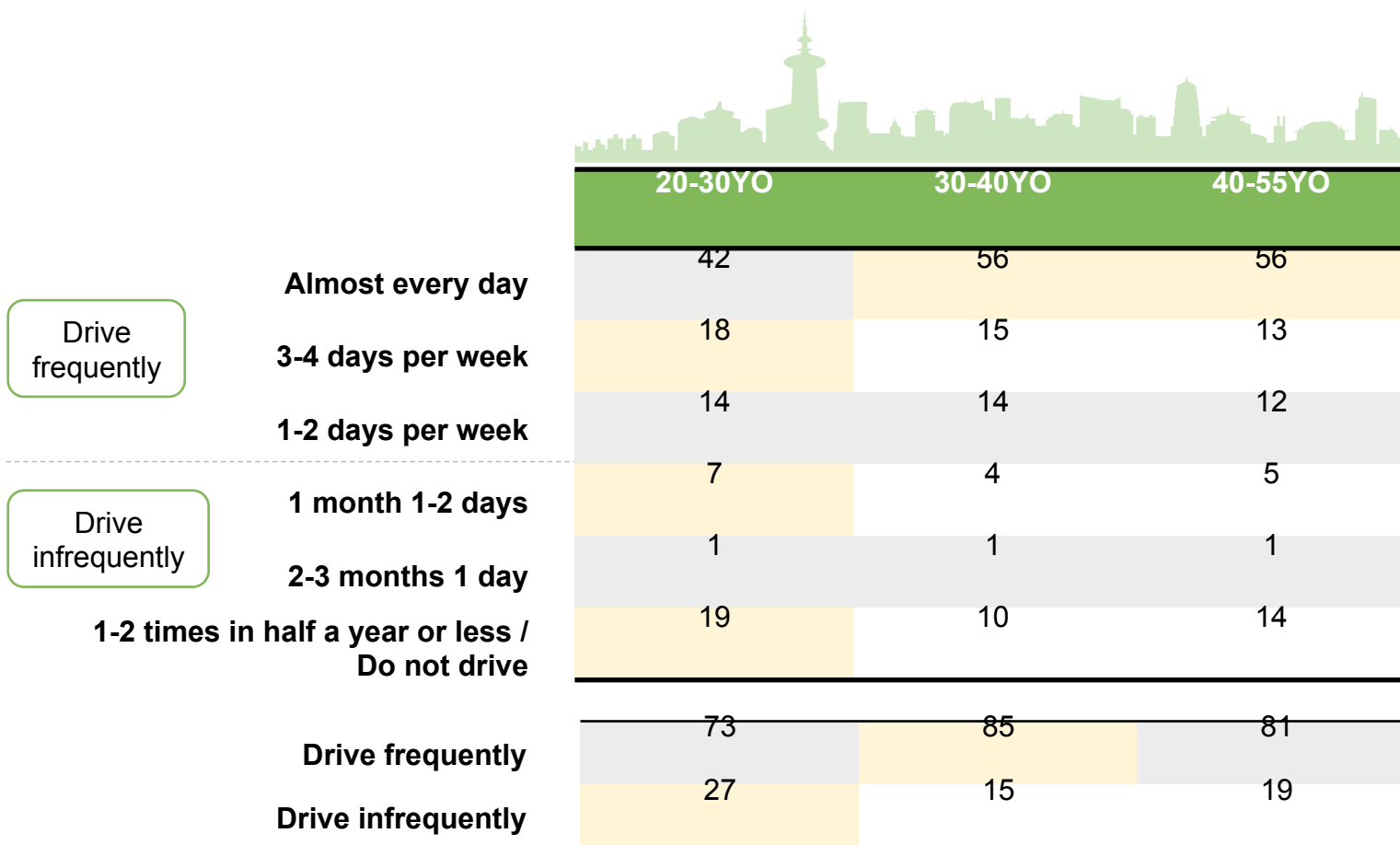
Car owners in Shanghai, Guangzhou and Haikou drive more frequently than average, while those in Beijing and Tianjin drive less frequently.



Driving frequency tend to rise when the car number owned by family rises. Most car owners who drive not so frequent are more likely to be those who own one car in their family.

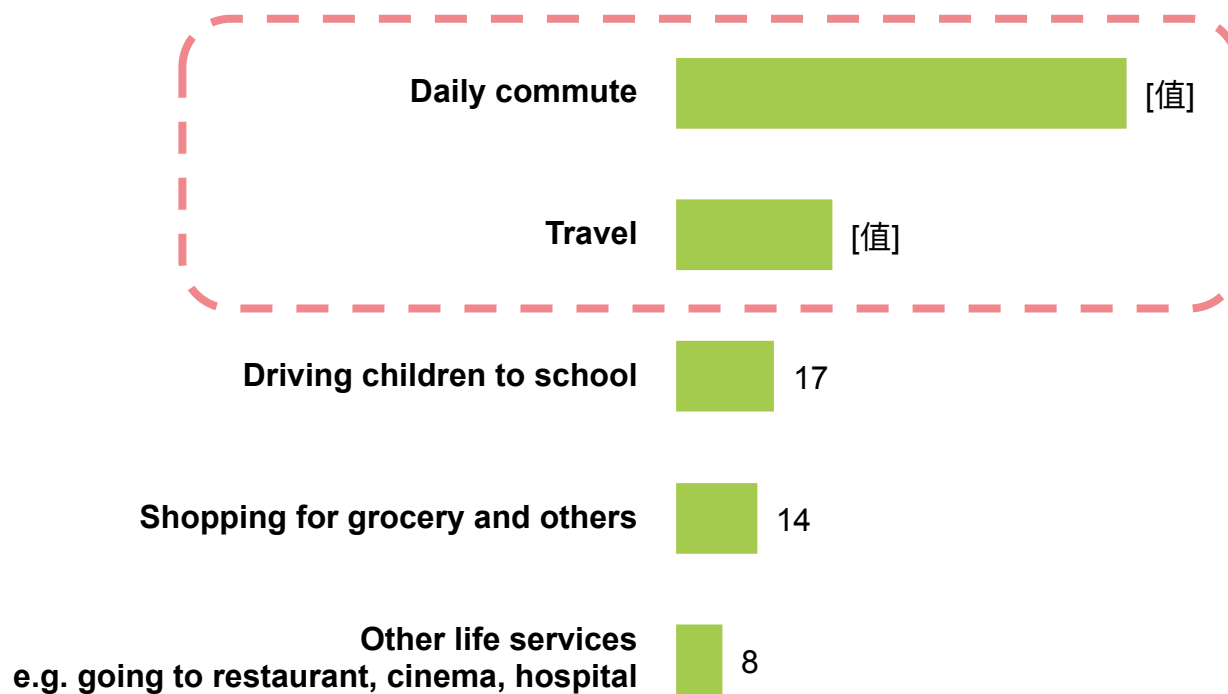


When reaching 30 years old, the driving frequency rises significantly.



Most car owners drive for daily commute.

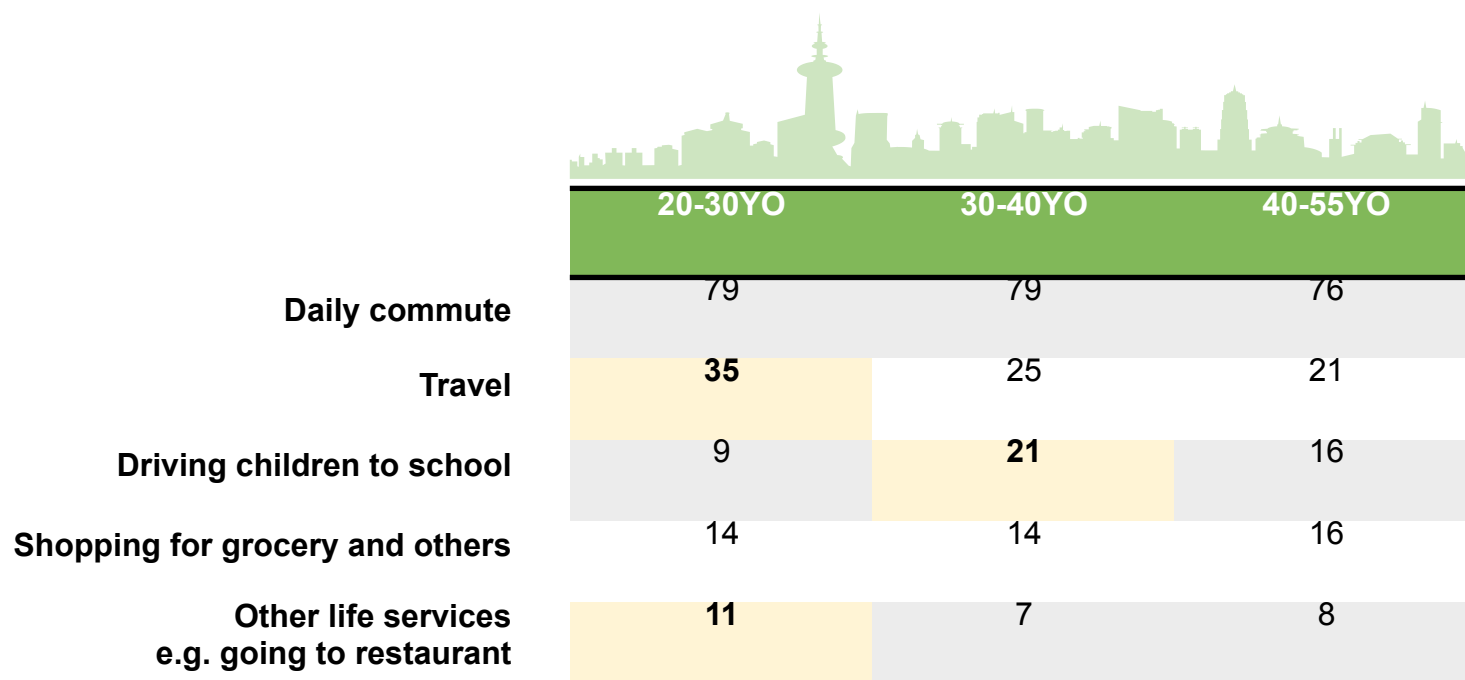
Driving purpose



Car owners in Shanghai and Guangzhou drive more often for daily commute, while drivers in Guangzhou and Shenzhen drive more often for traveling.

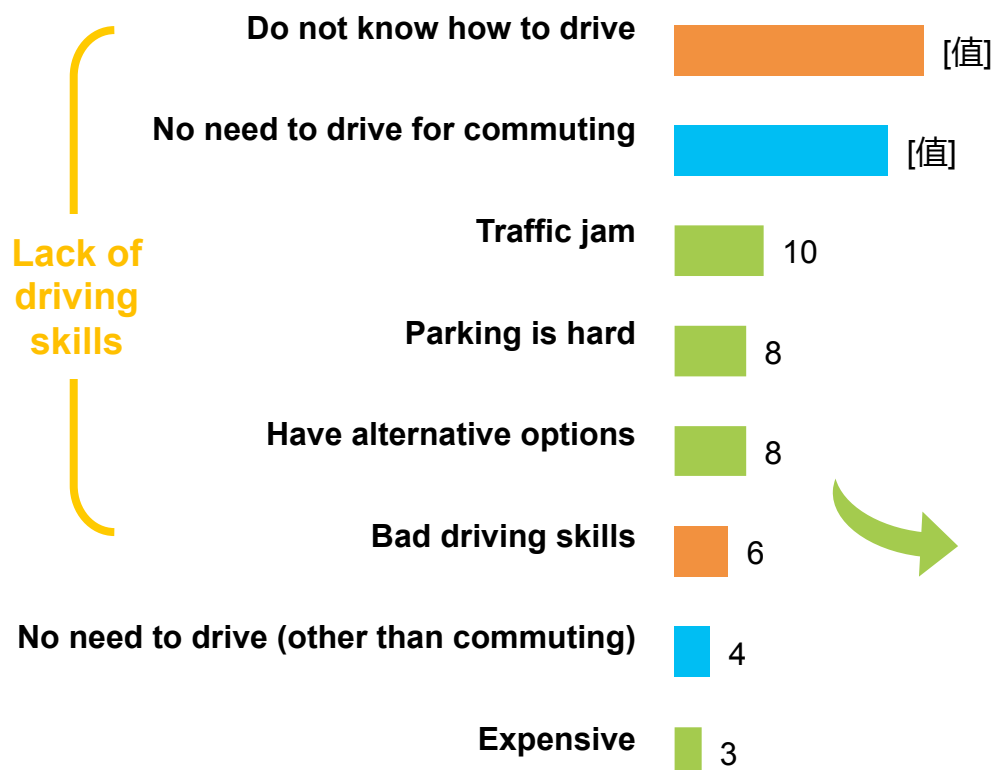
	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Tianjin	Haikou	Sanya	Others (Hainan)	Hainan (Total)
Daily commute	76	84	81	76	77	78	79	77	63	77
Travel	28	32	32	32	26	18	18	25	35	21
Driving children to school	11	11	19	21	17	16	15	20	23	17
Shopping for grocery and others	18	18	16	13	11	13	11	12	20	12
Other life services e.g. going to restaurant	8	9	10	8	8	8	6	11	8	8

Younger car owners tend to drive for travelling more often, while middle-aged drivers tend to drive children to school more often.



The main reason of driving with low frequency is “lack of driving skills”, followed by “no need to drive”. Public transport is car owners’ main alternative traveling option.

The reasons of driving infrequently



Features of those who do not know how to drive

Gender	Female	
	Male	
Car ownership	One-Car Family	
	Two-Car Family	
	Three or more	
Age	20-30 Years Old	
	30-40 Years Old	
	40-50 Years Old	
Driving frequency	1-2 times in half a year or less / Do not drive	

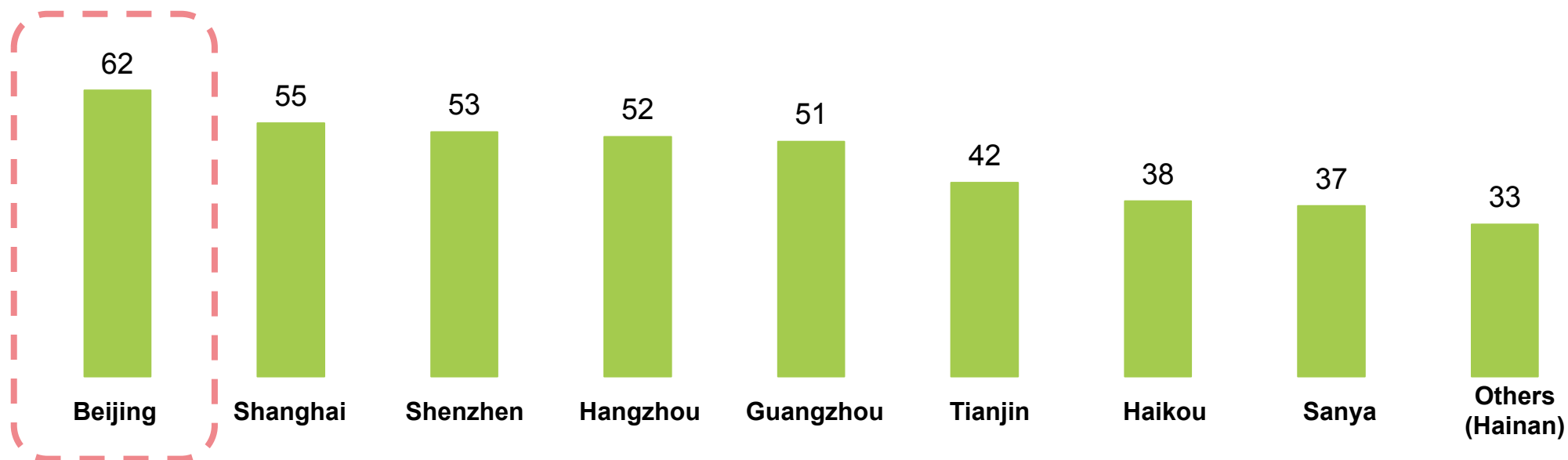
Alternative options	%
Public transport	61
Motorcycles, electric vehicles	15
Taxi	7
Bicycles	7
Walk	6
Carpooling	2

For reason of seldom driving, the main reason is no need for commuting, especially Haikou. Car owners in Bei-Shang-Guang-Shen are more troubled by traffic jam, especially Guangzhou. And those in Beijing are more likely to consider other options instead of driving.

	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Tianjin	Haikou	Sanya	Others (Hainan)	H (Hainan)
Do not know how to drive	30	28	21	30	28	33	28	14	30	
No need to drive for commuting	16	27	16	27	28	21	38	28	40	
Traffic jam	12	10	17	13	9	4	3	3	-	
Parking is hard	6	12	13	10	4	3	13	14	30	
Have alternative options	14	10	9	11	7	2	3	3	10	
Bad driving skills	4	4	5	5	1	4	5	7	-	
Need to drive (other than commuting)	7	6	6	7	5	9	3	-	-	
Expensive	3	4	6	2	4	1	-	-	-	

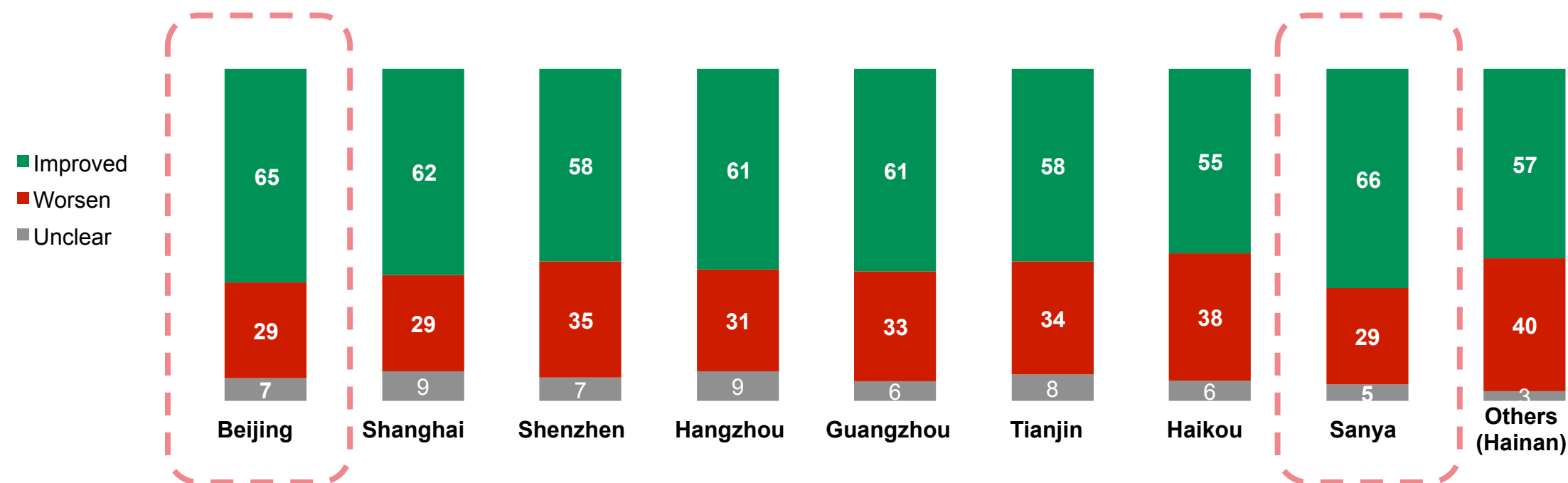
More than half of the respondents in Bei-Shang-Guang-Shen as well as Hangzhou think they have the most serious traffic jam, especially those in Beijing.

The congestion degree of cities
(those who rate 8-10)



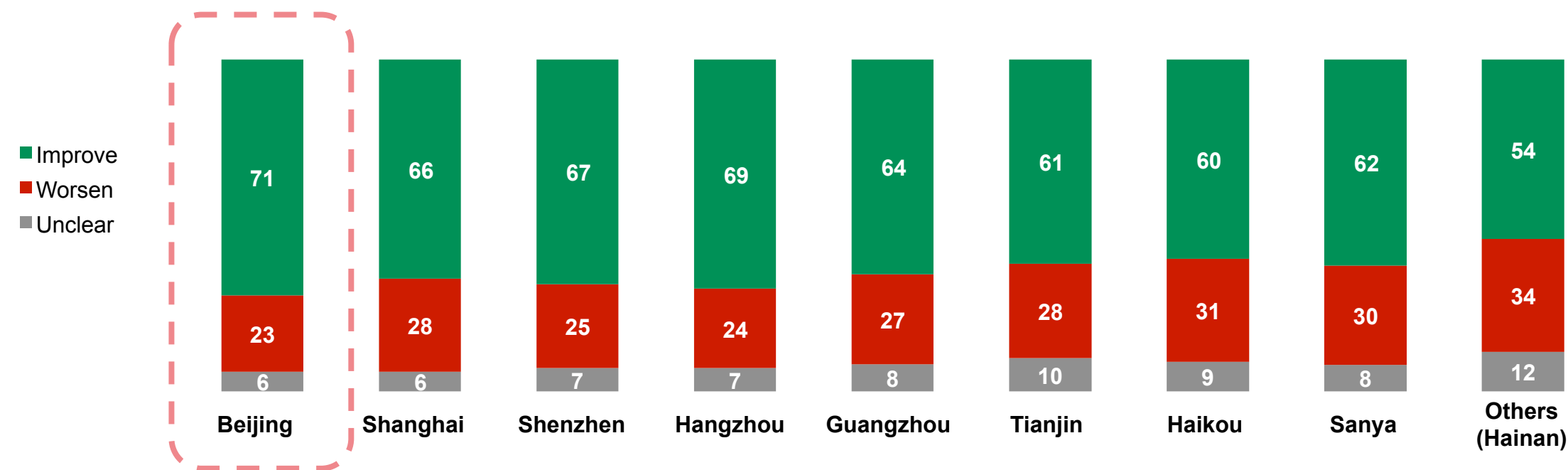
Most respondents believe that the traffic condition has been improved in the recent years, especially residents in Beijing and Sanya.

The Change of Congestion Degree in Recent Years



The majority are confident that the traffic condition will be improved in the next five years, especially Beijing, Shenzhen and Hangzhou. Residents in Hainan have less confidence in congestion improvements.

The Change of Congestion Degree in the Next Five Years



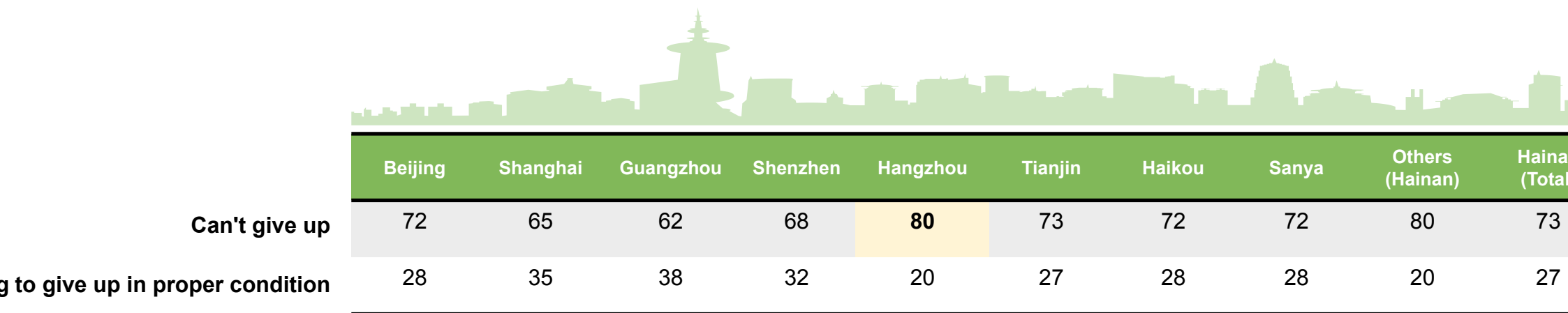
Among car drivers who seldom drive, only 30% are willing to give up their plate.

The Willingness of Infrequent Drivers Abandoning License Plates



ose who seldom drive in Hangzhou are least likely to abandon, compared with other cities.

%



1. Utilization of car is relatively high, 80% of the car owners drive at least once per week.
2. Daily commute is the primary reason for car owners to drive frequently.
3. Driving usage can vary from ages to ages, younger generations tend to drive for travelling while middle-agers tend to drive to send children to school.
4. The lack of driving skills and low necessity of driving is the reason of low frequency driving; public transport is the most used alternative method of travelling.
5. Traffic control has achieved some positive results, most people believe that the traffic condition has been improved in the recent years and will continue to improve, especially respondents in Beijing.



Thanks!

- Ipsos (China) Consulting Co., Ltd.
- June 2020

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GAME CHANGERS

