



SMMT – EU membership survey

METHODOLOGY NOTE

ComRes interviewed 204 members of the Society of Motor Manufacturers and Traders (SMMT) online between 14th January and 17th February 2016. ComRes is a member of the British Polling Council and abides by its rules.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

To commission a voting intention poll or a public opinion survey please contact Katharine Peacock: katharine.peacock@comres.co.uk

To register for Pollwatch, a monthly newsletter update on the polls, please email: pollwatch@comres.co.uk

SMMT EU MEMBERSHIP SURVEY 2016

Q1. Do you think that the state of the UK automotive industry has improved, stayed the same or worsened over the last 12 months?	1
Base: All respondents	
Q2. And do you think that the state of the UK automotive industry will improve, stay the same or get worse over the next 12 months?	2
Base: All respondents	
Q2. And do you think that the state of the UK automotive industry will improve, stay the same or get worse over the next 12 months?	3
by Q1. Do you think that the state of the UK automotive industry has improved, stayed the same or worsened over the last 12 months?	
Base: All respondents	
Q3. If a referendum on the UK's membership of the European Union were held tomorrow, which result would be best for your business?	4
Base: All respondents	
Q5_SUM. If the UK left the EU, what would be the impact on your business in the short and medium to long term? SUMMARY TABLE	5
Base: All respondents	
Q5_1. If the UK left the EU, what would be the impact on your business in the short and medium to long term? The short-term impact on your business (next 5 years)	6
Base: All respondents	
Q5_2. If the UK left the EU, what would be the impact on your business in the short and medium to long term? The medium to long-term impact on your business (next 6-10 years)	7
Base: All respondents	
Q7. What is the current impact of UK membership of the European Union (EU) on your business?	8
Base: All respondents	
Q8_SUM. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? SUMMARY TABLE	9
Base: All respondents	
Q8_1. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Level of investment	10
Base: All respondents	
Q8_2. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Research and development (R&D) funding and collaboration	11
Base: All respondents	
Q8_3. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? International competitiveness	12
Base: All respondents	
Q8_4. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Access to EU automotive markets	13
Base: All respondents	
Q8_5. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Access to non-EU automotive markets	14
Base: All respondents	
Q8_6. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Ability to influence industry standards and regulations	15
Base: All respondents	
Q8_7. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas? Access to a skilled workforce	16
Base: All respondents	
Q9. Which of the following potential EU reforms, if any, would be most beneficial for your business?	17
Base: All respondents	
D2. Which of the following best describes the main activity of your business?	18
Base: All respondents	
D3. How many people are directly employed by your business in all UK locations?	19
Base: All respondents	

SMMT EU MEMBERSHIP SURVEY 2016

Q1. Do you think that the state of the UK automotive industry has improved, stayed the same or worsened over the last 12 months?

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
Improved	126 62%	86 59%	40 69%
Stayed the same	50 25%	37 25%	13 22%
Worsened	23 11%	18 12%	5 9%
Don't know	5 2%	5 3%	- -
NETS			
Net: Improved or stayed the same	176 86%	123 84%	53 91%

SMMT EU MEMBERSHIP SURVEY 2016**Q2. And do you think that the state of the UK automotive industry will improve, stay the same or get worse over the next 12 months?**

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
Improve	57 28%	39 27%	18 31%
Stay the same	109 53%	79 54%	30 52%
Worsen	28 14%	20 14%	8 14%
Don't know	10 5%	8 5%	2 3%
Net: Improve or stay the same	166 81%	118 81%	48 83%

SMMT EU MEMBERSHIP SURVEY 2016

**Q2. And do you think that the state of the UK automotive industry will improve, stay the same or get worse over the next 12 months?
by Q1. Do you think that the state of the UK automotive industry has improved, stayed the same or worsened over the last 12 months?**

Base: All respondents

						NETS
	Total	Improved	Stayed the same	Worsened	Don't know	Net: Improved or stayed the same
Total	204 100%	126 100%	50 100%	23 100%	5 100%	176 100%
Improve	57 28%	49 39%	6 12%	2 9%	- -	55 31%
Stay the same	109 53%	66 52%	31 62%	12 52%	- -	97 55%
Worsen	28 14%	7 6%	13 26%	8 35%	- -	20 11%
Don't know	10 5%	4 3%	- -	1 4%	5 100%	4 2%
Net: Improve or stay the same	166 81%	115 91%	37 74%	14 61%	- -	152 86%

SMMT EU MEMBERSHIP SURVEY 2016**Q3. If a referendum on the UK's membership of the European Union were held tomorrow, which result would be best for your business?**

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
Remain in the EU	158 77%	107 73%	51 88%
Leave the EU	18 9%	18 12%	- -
Don't know	28 14%	21 14%	7 12%

SMMT EU MEMBERSHIP SURVEY 2016**Q5_SUM. If the UK left the EU, what would be the impact on your business in the short and medium to long term?****SUMMARY TABLE**

Base: All respondents

	Total	Very positive	Fairly positive	No impact	Fairly negative	Very negative	Don't know	NETS		
								Positive	Negative	Mean
The medium to long-term impact on your business (next 6-10 years)	204 100%	9 4%	11 5%	28 14%	70 34%	50 25%	36 18%	20 10%	120 59%	2.16
The short-term impact on your business (next 5 years)	204 100%	3 1%	8 4%	52 25%	90 44%	26 13%	25 12%	11 5%	116 57%	2.28

SMMT EU MEMBERSHIP SURVEY 2016**Q5_1. If the UK left the EU, what would be the impact on your business in the short and medium to long term?****The short-term impact on your business (next 5 years)**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	3 1%	3 2%	- -
Fairly positive	(4)	8 4%	8 5%	- -
No impact	(3)	52 25%	39 27%	13 22%
Fairly negative	(2)	90 44%	58 40%	32 55%
Very negative	(1)	26 13%	19 13%	7 12%
Don't know		25 12%	19 13%	6 10%
NETS				
Net: Positive		11 5%	11 8%	- -
Net: Negative		116 57%	77 53%	39 67%
Mean score		2.28	2.35	2.12
Standard deviation		.83	.90	.62
Standard error		.06	.08	.09

SMMT EU MEMBERSHIP SURVEY 2016**Q5_2. If the UK left the EU, what would be the impact on your business in the short and medium to long term?****The medium to long-term impact on your business (next 6-10 years)**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	9 4%	9 6%	- -
Fairly positive	(4)	11 5%	10 7%	1 2%
No impact	(3)	28 14%	22 15%	6 10%
Fairly negative	(2)	70 34%	45 31%	25 43%
Very negative	(1)	50 25%	30 21%	20 34%
Don't know		36 18%	30 21%	6 10%
NETS				
Net: Positive		20 10%	19 13%	1 2%
Net: Negative		120 59%	75 51%	45 78%
Mean score		2.16	2.34	1.77
Standard deviation		1.09	1.18	.73
Standard error		.08	.11	.10

SMMT EU MEMBERSHIP SURVEY 2016**Q7. What is the current impact of UK membership of the European Union (EU) on your business?**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	41 20%	17 12%	24 41%
Fairly positive	(4)	103 50%	78 53%	25 43%
No impact	(3)	34 17%	30 21%	4 7%
Fairly negative	(2)	13 6%	11 8%	2 3%
Very negative	(1)	3 1%	3 2%	- -
Don't know		10 5%	7 5%	3 5%
NETS				
Net: Positive		144 71%	95 65%	49 84%
Net: Negative		16 8%	14 10%	2 3%
Mean score		3.86	3.68	4.29
Standard deviation		.88	.87	.76
Standard error		.06	.07	.10

SMMT EU MEMBERSHIP SURVEY 2016**Q8_SUM. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****SUMMARY TABLE**

Base: All respondents

								NETS		
	Total	Very positive	Fairly positive	No impact	Fairly negative	Very negative	Don't know	Positive	Negative	Mean
Access to EU automotive markets	204 100%	67 33%	68 33%	57 28%	5 2%	1 *	6 3%	135 66%	6 3%	3.98
Access to a skilled workforce	204 100%	37 18%	76 37%	78 38%	5 2%	1 *	7 3%	113 55%	6 3%	3.73
Ability to influence industry standards and regulations	204 100%	33 16%	74 36%	62 30%	21 10%	7 3%	7 3%	107 52%	28 14%	3.53
International competitiveness	204 100%	23 11%	80 39%	74 36%	16 8%	3 1%	8 4%	103 50%	19 9%	3.53
Level of investment	204 100%	24 12%	58 28%	98 48%	10 5%	2 1%	12 6%	82 40%	12 6%	3.48
Research and development (R&D) funding and collaboration	204 100%	17 8%	61 30%	103 50%	7 3%	- -	16 8%	78 38%	7 3%	3.47
Access to non-EU automotive markets	204 100%	18 9%	40 20%	129 63%	6 3%	- -	11 5%	58 28%	6 3%	3.36

SMMT EU MEMBERSHIP SURVEY 2016**Q8_1. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Level of investment**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	24 12%	11 8%	13 22%
Fairly positive	(4)	58 28%	37 25%	21 36%
No impact	(3)	98 48%	77 53%	21 36%
Fairly negative	(2)	10 5%	10 7%	- -
Very negative	(1)	2 1%	2 1%	- -
Don't know		12 6%	9 6%	3 5%
NETS				
Net: Positive		82 40%	48 33%	34 59%
Net: Negative		12 6%	12 8%	- -
Mean score		3.48	3.33	3.85
Standard deviation		.82	.79	.78
Standard error		.06	.07	.11

SMMT EU MEMBERSHIP SURVEY 2016**Q8_2. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Research and development (R&D) funding and collaboration**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	17 8%	10 7%	7 12%
Fairly positive	(4)	61 30%	43 29%	18 31%
No impact	(3)	103 50%	79 54%	24 41%
Fairly negative	(2)	7 3%	5 3%	2 3%
Very negative	(1)	- -	- -	- -
Don't know		16 8%	9 6%	7 12%
NETS				
Net: Positive		78 38%	53 36%	25 43%
Net: Negative		7 3%	5 3%	2 3%
Mean score		3.47	3.42	3.59
Standard deviation		.71	.68	.78
Standard error		.05	.06	.11

SMMT EU MEMBERSHIP SURVEY 2016**Q8_3. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****International competitiveness**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	23 11%	15 10%	8 14%
Fairly positive	(4)	80 39%	50 34%	30 52%
No impact	(3)	74 36%	60 41%	14 24%
Fairly negative	(2)	16 8%	13 9%	3 5%
Very negative	(1)	3 1%	2 1%	1 2%
Don't know		8 4%	6 4%	2 3%
NETS				
Net: Positive		103 50%	65 45%	38 66%
Net: Negative		19 9%	15 10%	4 7%
Mean score		3.53	3.45	3.73
Standard deviation		.86	.86	.84
Standard error		.06	.07	.11

SMMT EU MEMBERSHIP SURVEY 2016**Q8_4. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Access to EU automotive markets**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	67 33%	37 25%	30 52%
Fairly positive	(4)	68 33%	54 37%	14 24%
No impact	(3)	57 28%	48 33%	9 16%
Fairly negative	(2)	5 2%	4 3%	1 2%
Very negative	(1)	1 *	1 1%	- -
Don't know		6 3%	2 1%	4 7%
NETS				
Net: Positive		135 66%	91 62%	44 76%
Net: Negative		6 3%	5 3%	1 2%
Mean score		3.98	3.85	4.35
Standard deviation		.88	.86	.83
Standard error		.06	.07	.11

SMMT EU MEMBERSHIP SURVEY 2016**Q8_5. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Access to non-EU automotive markets**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	18 9%	9 6%	9 16%
Fairly positive	(4)	40 20%	25 17%	15 26%
No impact	(3)	129 63%	103 71%	26 45%
Fairly negative	(2)	6 3%	5 3%	1 2%
Very negative	(1)	- -	- -	- -
Don't know		11 5%	4 3%	7 12%
NETS				
Net: Positive		58 28%	34 23%	24 41%
Net: Negative		6 3%	5 3%	1 2%
Mean score		3.36	3.27	3.63
Standard deviation		.69	.63	.80
Standard error		.05	.05	.11

SMMT EU MEMBERSHIP SURVEY 2016**Q8_6. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Ability to influence industry standards and regulations**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	33 16%	16 11%	17 29%
Fairly positive	(4)	74 36%	48 33%	26 45%
No impact	(3)	62 30%	53 36%	9 16%
Fairly negative	(2)	21 10%	17 12%	4 7%
Very negative	(1)	7 3%	6 4%	1 2%
Don't know		7 3%	6 4%	1 2%
NETS				
Net: Positive		107 52%	64 44%	43 74%
Net: Negative		28 14%	23 16%	5 9%
Mean score		3.53	3.36	3.95
Standard deviation		1.01	.98	.95
Standard error		.07	.08	.13

SMMT EU MEMBERSHIP SURVEY 2016**Q8_7. What is the impact of the UK's membership of the European Union (EU) on your business in each of the following areas?****Access to a skilled workforce**

Base: All respondents

		BUSINESS SIZE		
		Total	SMEs	Large
Total		204 100%	146 100%	58 100%
Very positive	(5)	37 18%	18 12%	19 33%
Fairly positive	(4)	76 37%	54 37%	22 38%
No impact	(3)	78 38%	62 42%	16 28%
Fairly negative	(2)	5 2%	5 3%	- -
Very negative	(1)	1 *	1 1%	- -
Don't know		7 3%	6 4%	1 2%
NETS				
Net: Positive		113 55%	72 49%	41 71%
Net: Negative		6 3%	6 4%	- -
Mean score		3.73	3.59	4.05
Standard deviation		.81	.79	.79
Standard error		.06	.07	.10

SMMT EU MEMBERSHIP SURVEY 2016**Q9. Which of the following potential EU reforms, if any, would be most beneficial for your business?**

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
Better regulation and reduction of red tape	122 60%	88 60%	34 59%
Better consistency in the application of EU rules by all member states	95 47%	64 44%	31 53%
Greater emphasis on free trade and global market access	78 38%	52 36%	26 45%
More efficient and cost-effective EU governance and institutions	67 33%	47 32%	20 34%
Financial reforms for a stable Eurozone	66 32%	46 32%	20 34%
Increased focus on international competitiveness	57 28%	37 25%	20 34%
Completing the European Single Market, including digital	23 11%	17 12%	6 10%
None of the above	6 3%	6 4%	- -
Don't know	8 4%	7 5%	1 2%

SMMT EU MEMBERSHIP SURVEY 2016**D2. Which of the following best describes the main activity of your business?**

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
Vehicle or engine manufacturer	31 15%	14 10%	17 29%
Vehicle converter and trailer manufacturer	12 6%	12 8%	- -
Component / product part / sub-assembly supplier	67 33%	48 33%	19 33%
Aftermarket supplier, distributor or retailer	36 18%	31 21%	5 9%
Vehicle distributor, retailer or repairer	13 6%	8 5%	5 9%
Other	45 22%	33 23%	12 21%
NETS			
Net: Supply chain and manufacturers	110 54%	74 51%	36 62%
Net: Distributors	49 24%	39 27%	10 17%

SMMT EU MEMBERSHIP SURVEY 2016**D3. How many people are directly employed by your business in all UK locations?**

Base: All respondents

	BUSINESS SIZE		
	Total	SMEs	Large
Total	204 100%	146 100%	58 100%
0-9	25 12%	25 17%	- -
10-49	52 25%	52 36%	- -
50-249	69 34%	69 47%	- -
250+	58 28%	- -	58 100%
NETS			
Net: SMEs	146 72%	146 100%	- -
Net: Large	58 28%	- -	58 100%