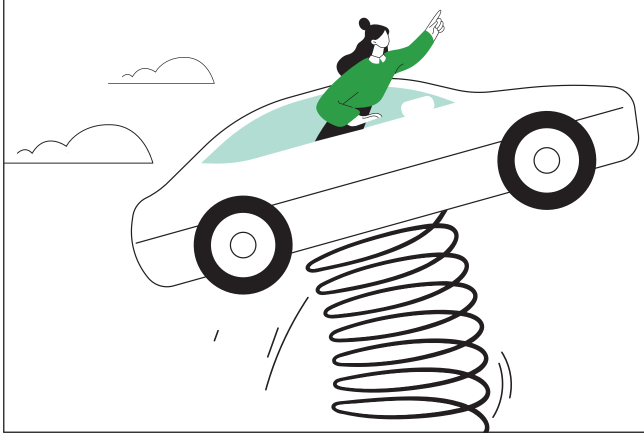
2026

AUTO

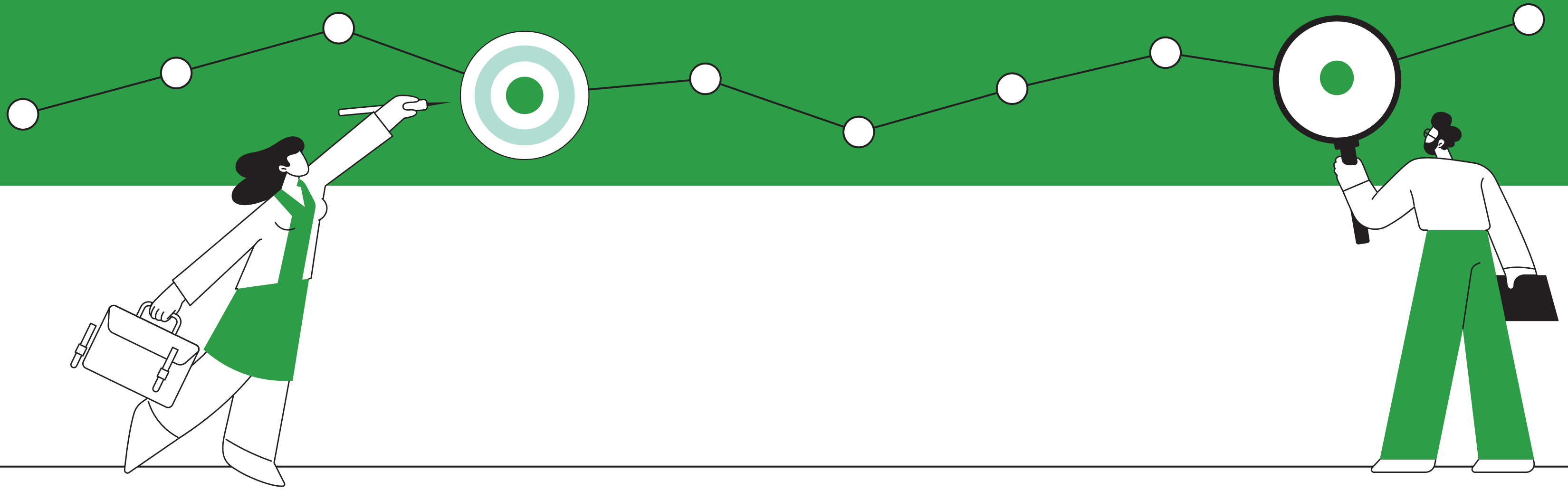
Cars:
5 Ways to Bounce Back

An international survey
carried out in 13 countries



CONSORS FINANZ
BNP PARIBAS

EDITORIAL



Hardly any other industry is discussed in public as passionately as the automotive industry. The car is part of our identity, and the carmakers have long been a symbol of prosperity and economic strength in Germany. But there is a lot of crunching in the gears.

The German and, to a large extent, the European automotive industry is in a deep crisis. Declining market shares in the main export markets of China and the USA are meeting weak demand in Europe and putting manufacturers under massive pressure. Especially in the European home markets, which were previously considered safe, there has been no real momentum since the Corona pandemic; rising living costs and weak growth are also putting an additional strain on the new car market.

How do consumers perceive the current situation? What do they think of the car? And what do you think could get the market going again? These are the questions that the Automotive Barometer 2026 explores.

One thing is certain: the love of the car is unbroken; it remains indispensable for people – both emotionally and functionally. Our study shows very clearly that the faltering demand for new cars, especially in Europe, is not an acceptance problem, but a supply problem. Drivers need affordable cars. Germans in particular expect better value for money.

Both the purchase price and running costs are the most important criteria for consumers when buying a car. Price therefore remains a decisive lever for stimulating the market. At the same time, driving remains an emotional experience for many and they expect further innovations on the car market – also with a view to the environmental friendliness of the vehicles. When it comes to changing something, respondents see the manufacturers primarily as having a duty. Nevertheless, retailers continue to have a major influence on sales. Digitization or not – car buyers still attach great importance to personal contact and on-site advice.

As a financial partner of car manufacturers and dealers, we also draw our conclusions from the results of the 2026 Automotive Barometer. With attractive financing solutions, we can make an important contribution to making the car easily accessible and more affordable for private households.

Michel Thebault
CEO Consors Finanz

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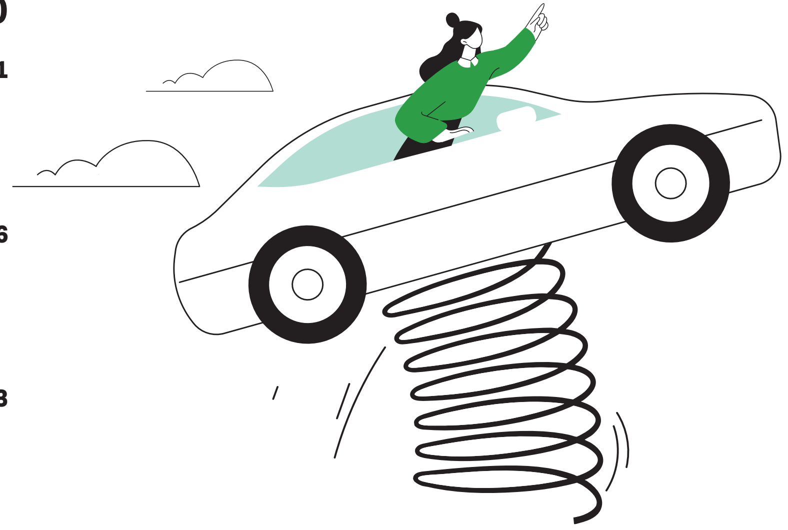


1

Headwinds in the Automotive Sector

For several years now, the state of the car market has been one of the media's favourite preoccupations, with figures that are enthusiastic when it comes to margins, but less so when it comes to annual sales, particularly in Europe. Historically, culturally, socially and economically, the car industry is a subject that arouses controversy, heated debate, contradictory forecasts - in short, inflaming passions. But there is one thing that everyone can agree on. The automotive sector is not in the best of health. And there are many reasons for this.

A detrimental macro-economic context

A HEALTH CRISIS THAT HAS LEFT ITS MARKS

In the space of just a few years, the world has experienced a series of crises that has had no equivalent for a very long time. Following the subprime mortgage and government debt crises, the Covid-19 crisis marked the 'zero point' in four years of turmoil. In addition to its health consequences, it has had a wide-ranging impact on the economic environment. Debts have increased, limiting the budgetary capacity of governments, particularly in Southern Europe. Also in Europe, savings rates hit record highs, reflecting the cautious, wait-and-see attitude of households. Domestic demand, particularly in China, is struggling to recover, with confidence shaken.

GEOPOLITICAL TENSIONS THAT PERSIST AND MULTIPLY

This health crisis was followed by other crises that also knew no borders. With the wars in Ukraine and the Middle East, and the attack on Iran, deadly and often long-lasting conflicts, leading to major economic sanctions, have brought back memories that the world thought were long buried.

A CHALLENGING ECONOMIC ENVIRONMENT

Against this backdrop, inflation, also long forgotten, has made a comeback. Interest rates have soared again. Budget deficits are at record levels in the United States and France. Unemployment is likely to increase again. Energy prices have fluctuated sharply. Purchasing power has been affected almost everywhere.

An inward-looking attitude that could spell the end of globalisation

THE CHINESE HOLISTIC APPROACH

Could this series of crises have swept away the global economic organisation that had prevailed for many years? In the world's second largest economy, which some people still like to describe as 'developing', the situation changed a long time ago, particularly in the automotive sector. State control, which is almost total, has made it possible to give a marked boost to electric cars, with preference given to national brands. Since 2010, China has accounted for 75% of direct subsidy policies implemented worldwide*.

THE NEW AGGRESSIVE POLICY OF THE UNITED STATES

In the world's largest economy, with the return of Donald Trump to the presidency, the time has come to turn inward and launch an unprecedented legislative offensive. After abolishing the Inflation Reduction Act, enacted by Joe Biden and which favoured electric vehicles, the Big Beautiful Bill and considerably increased customs duties began to penalise anything that was not American-made.

A DISORGANISED EUROPEAN RESPONSE

Faced with the two behemoths of the sector, EU member states remain divided, lacking boldness and often defending their interests individually. Several countries, such as Germany, which has been particularly hard hit by US tariffs, are supporting their manufacturers and the market with their own resources. However, regulations and technical constraints are holding back the effectiveness of the measures adopted.
The Draghi report, calling for a European industrial action plan, did indeed see the light of day. But will its recommendations be acted upon?
The European Union is struggling to come up with concrete, aligned, firm and clear responses that are equal to the challenges, and above all sustainable. In other words, the European car industry is in dire straits. And yet, with savings on the rise, accompanied by a shift towards production, Europe has an asset on which it could profitably build.

*CLIFA 2025 study (Comité de Liaison des Industries Fournisseurs de l'Automobile).

Exclusive advantages... but not for everyone

CHINA'S VIRTUAL MONOPOLY

In terms of production, each country intends to use its 'assets' to make the difference. China produces 70% of the world's rare earths, which are very important in car manufacturing, and 90% of heavy rare earths, such as permanent magnets. As for the electric batteries, China's situation is just as comfortable. CATL, world number one, controls 37.9% of the global market according to CnEVPost. BYD, in second place, is close to 18%. Given that global production of electric batteries has risen by 37.3% in the space of a year, this competitive advantage is not about to disappear, even if a number of giga-factories are planned in Europe and the United States, and recycling could, in part, shake up the market.

THE TECHNOLOGICAL ADVANTAGES OF THE WEST

As for the Western countries, they have a number of assets that are also of considerable importance. Even though they are mainly manufactured in Taiwan, new-generation chips are boosting performance in artificial intelligence, which is essentially an American preserve, despite Chinese and European ambitions.

JAPANESE COMMERCIAL CONSISTENCY

As home to the world's leading car manufacturer, Japan is trying to make the most of its position by pursuing a solid and consistent policy, thanks in particular to the success of hybrid powertrains, an area in which it was a pioneer.

A car market in crisis

LOW SALES
If we look back to the pivotal moment at the start of the health crisis, the state of the automotive market as a whole was precarious, or, at the very least, fluctuating.

Admittedly, 2023 and 2024 saw a relative recovery in sales, but this recovery was far from being shared by everyone. While two of the world's leaders started to recover, many other countries, particularly in Europe, saw their markets remain sluggish.

In China, registrations rose by 9.5% between 2023 and 2024, for a total of 26.9 million vehicles. The Nanfang Zhoumo newspaper reported that 96 cities in the country had more than one million vehicles.

At the same time, car-related household consumption was also down, against a general backdrop of inflation and, even more importantly, soaring vehicle prices in Europe and the United States.
(Fig. 1).

Fig. 1

Vehicle sales.
(units: 100,000 vehicles)

	2019	2020	2021	2022	2023	2024
Germany	39.6	32.2	29.2	29.1	31.4	31.4
Belgium	6.3	5.0	4.6	4.3	5.6	5.2
China	257.7	253.1	262.7	268.6	300.9	314.4
Spain	14.9	10.2	10.2	9.4	11.1	12.0
United States	175.8	149.9	155.5	143.8	161.3	164.4
France	27.4	21.0	21.4	19.3	22.1	21.6
Italy	20.9	15.3	16.6	14.9	18.0	17.9
Japan	51.9	45.9	44.5	42.0	47.7	44.2
Netherlands	4.5	3.6	4.0	3.8	4.6	5.3
Poland	5.6	4.3	4.5	4.6	5.8	6.5
Portugal	2.6	1.7	1.8	1.8	2.3	2.4
United Kingdom	26.9	19.3	20.1	19.1	22.6	23.2
Turkey	4.8	7.7	7.4	7.8	12.3	12.4
Total	638.7	569.3	582.5	568.6	645.5	660.9

Source: Marklines

A renewal deficit with serious consequences

Before the health crisis, between 2015 and 2019, the European market (European Union + United Kingdom) recorded between 16 and 17 million new passenger car registrations each year. Between 2020 and 2024, this figure fell to an average of 11.75 million. Cumulatively, over the last five years, the renewal 'deficit' has exceeded 20 million passenger cars.

As well as weakening the industrial and commercial sectors, this situation is directly contributing to the structural ageing of the vehicle fleet and slowing down the uptake of cleaner, more efficient vehicles, such as hybrid and electric models.

In a realistic scenario of demographic stabilisation and a moderate extension of the lifespan (scrappage age) of vehicles, from 20 years at present to 22 years in 10 years' time, Europe should aim for an annual rate of around 13.5 million new vehicle registrations to avoid further ageing of its in-use car fleet.

Between 2020 and 2024
11.75 million
new passenger car registrations on average

Production feeling the effects

Quite logically, the market's hesitations are reflected in vehicle production. Production capacity has been under-utilised since 2020. Once again, China remains a special case, with overproduction that particularly involves electric vehicles. Faced with sluggish domestic consumption, Chinese manufacturers are lowering their prices and shifting their focus to exports, with the support of the government. They primarily target countries with little or no protection, unlike the United States, which has erected a particularly dissuasive wall of customs duties. China is now the world's leading exporter of light vehicles. **(Fig. 2)**. **(Fig. 3)**.

Fig. 2

Production of passenger cars.

(units: 100,000 vehicles)

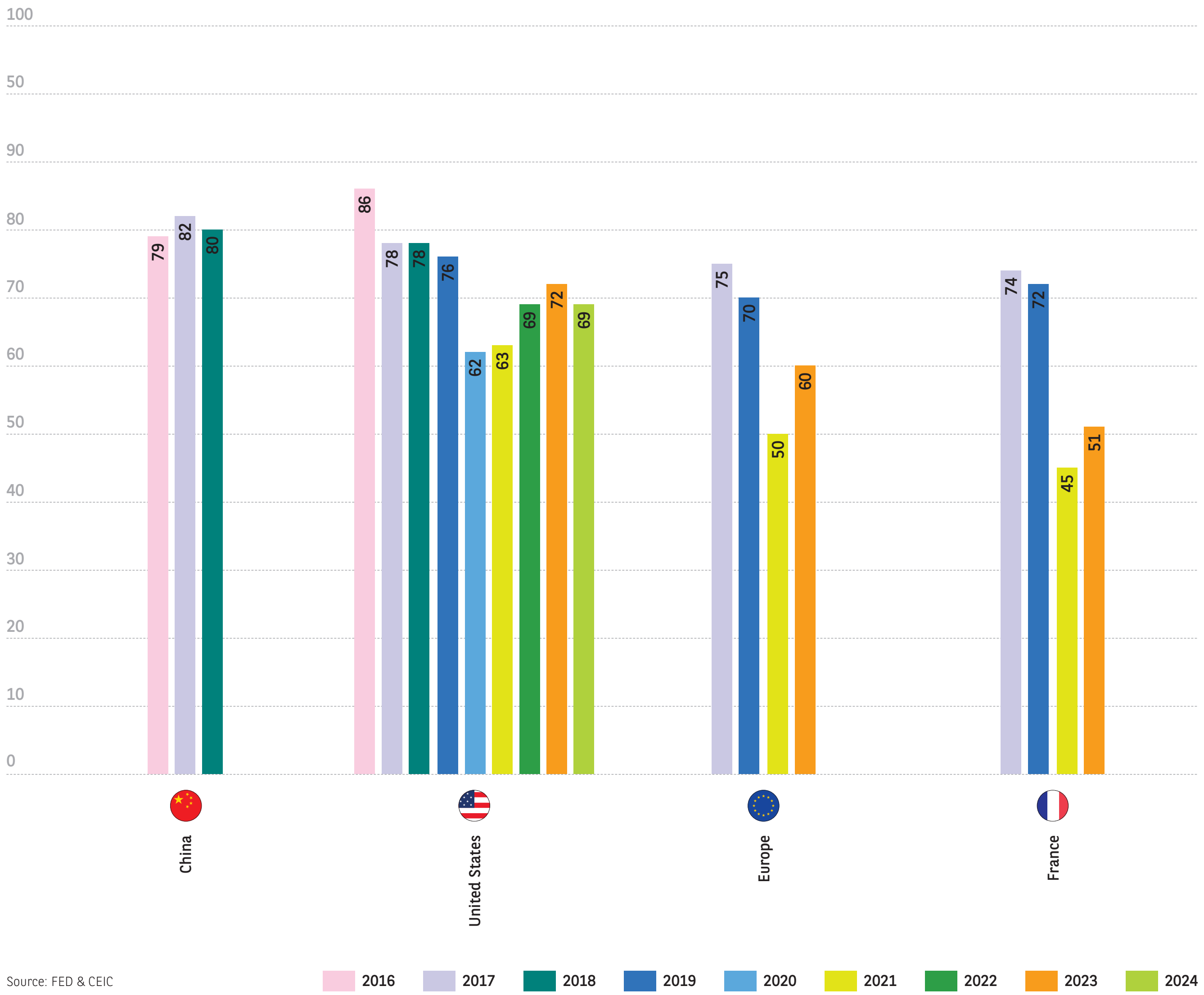
	2019	2020	2021	2022	2023	2024
Germany	46.6	35.2	31.0	34.8	41.1	40.7
Belgium	2.5	2.4	2.2	2.4	2.9	2.0
China	213.9	199.9	214.4	238.4	261.2	274.8
Spain	22.5	18.0	16.6	17.9	19.1	19.2
United States	25.1	19.3	15.6	17.0	17.4	14.3
France	16.6	9.3	9.2	10.1	10.3	9.1
Italy	5.4	4.5	4.4	4.7	5.4	3.1
Japan	83.8	69.6	66.2	65.7	77.7	71.4
Netherlands	1.8	1.3	1.1	1.0	1.2	0.1
Poland	4.3	2.8	2.6	2.6	3.0	2.2
Portugal	2.8	2.1	2.3	2.6	2.4	2.6
United Kingdom	13.0	9.2	8.6	7.8	9.1	7.8
Turkey	9.8	8.6	7.8	8.1	9.5	9.0

Source: OICA

Fig. 3

Use of automotive capacity.

(in %)



Source: FED & CEIC

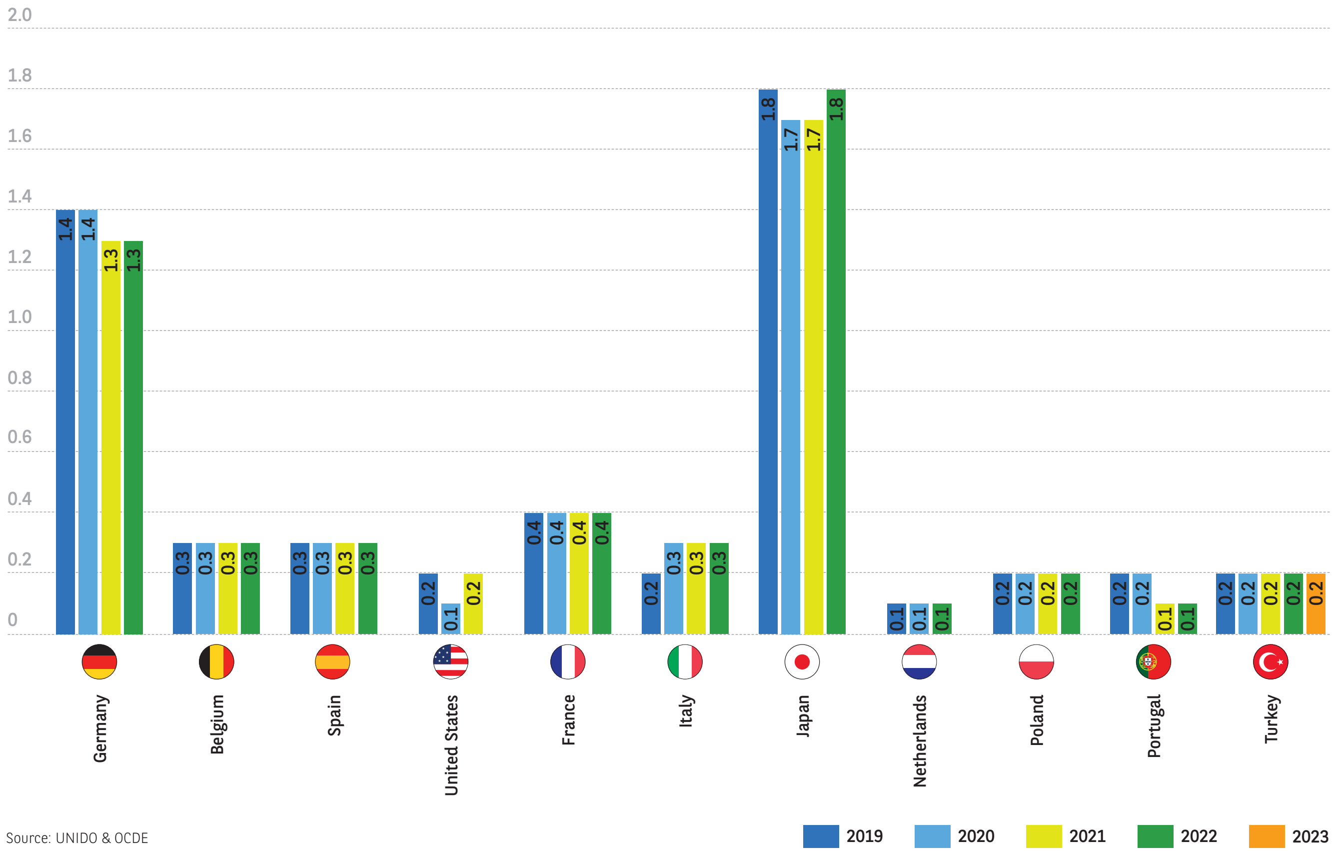
Employment heavily impacted

The impact on employment is just as brutal, once again mainly on the 'old continent'. From a series of plant closures to the impact on subcontracting and relocation to less costly climes, the future is even more uncertain, especially with the production of electric vehicles requiring less labour. **(Fig. 4)**.

Fig. 4

Jobs in the manufacturing of motor vehicles.

(share of employment in this sector, % of total economy)



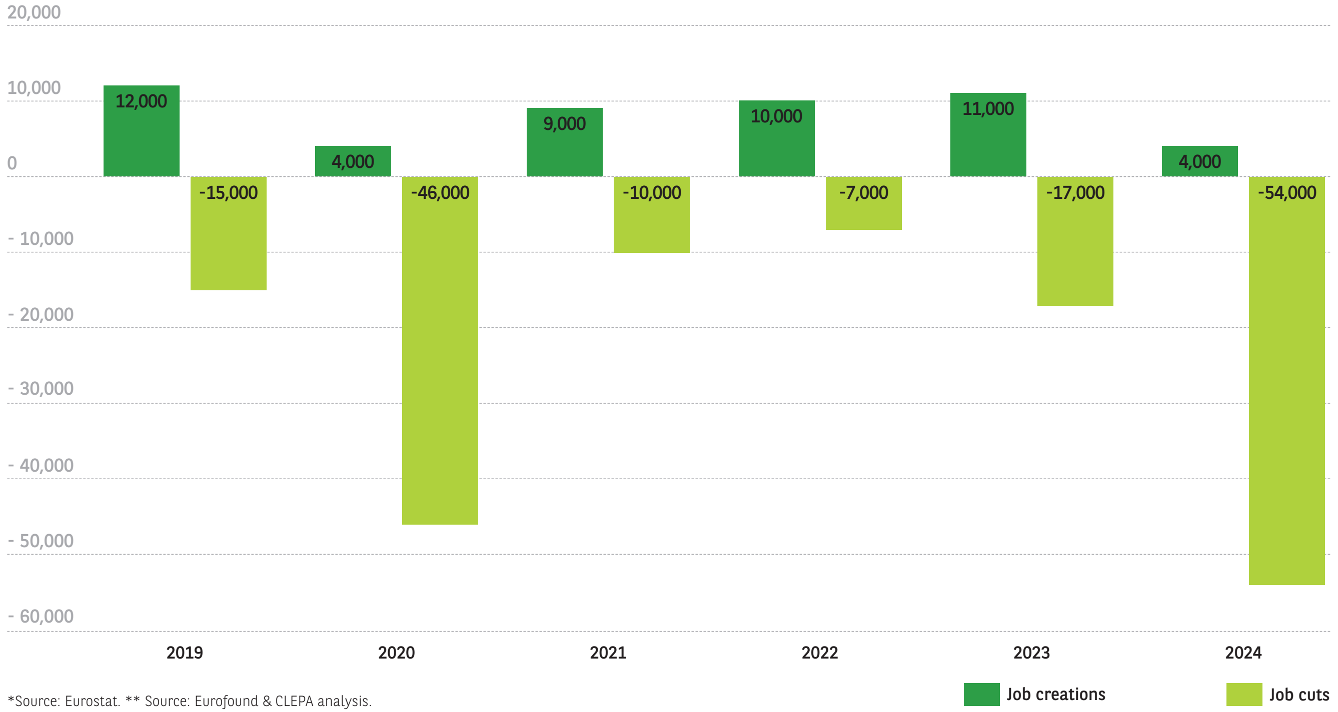
Source: UNIDO & OCDE

Europe hit hard by job losses

Fig. 5

Job advertisements in the automotive equipment sector.

(in Europe)



*Source: Eurostat. ** Source: Eurofound & CLEPA analysis.

A transition to electric that is not necessarily straightforward

Despite all this, the anticipated electric shift is not - or is no longer - crystal-clear and devoid of all clouds. After a period of strong growth, sales seem to be stagnating, or even falling in some countries, due to a combination of factors, not least of which is price, the questioning of policies to limit the use of combustion engine vehicles, and the persistent resistance to change on the part of a large proportion of customers when it comes to this technology. In China, where sales have exceeded 7 million units, the effects of overproduction are also being felt.

Fig. 6

Percentage of sales of electric vehicles by country.
(in %)

	2019	2020	2021	2022	2023	2024
Germany	1.5	5.7	12.0	15.9	16.7	12.1
Belgium	1.4	2.8	4.6	8.5	14.0	19.0
China	3.2	3.9	10.4	18.7	20.7	22.6
Spain	0.6	1.6	2.3	3.4	5.2	4.7
United States	1.3	1.7	3.2	5.6	7.4	7.8
France	1.8	5.4	7.7	10.8	14.6	14.7
Italy	0.5	1.9	4.1	3.5	4.0	3.9
Japan	0.4	0.3	0.4	1.3	1.8	1.3
Netherlands	13.8	19.7	15.8	18.8	26.4	25.5
Poland	0.2	0.5	1.1	1.8	2.2	2.3
Portugal	2.8	4.7	7.7	10.3	16.9	18.0
United Kingdom	1.5	5.8	10.0	14.9	14.9	17.3
Turkey	0.0	0.1	0.4	0.8	4.4	5.6

Source: Marklines

The price war is raging at a time when state subsidies are running out in many parts of the country. These same regions are struggling to support manufacturers in the sector. All the signs of the involution, so dear to President Xi Jinping, are beginning to show: unbridled competition is wiping out economic and technological gains.

In many countries, help-to-buy schemes have simply been abolished, as in the United States, or are in the process of disappearing, as in China. **(Fig. 6) (Fig. 7)**.

Fig. 7

Sales of electric vehicles.
(units: 100,000 vehicles)

	2019	2020	2021	2022	2023	2024
Germany	0.6	1.8	4.0	5.0	5.0	4.0
Belgium	0.1	0.1	0.0	0.0	1.0	1.0
China	8.3	10.0	27.0	50.5	62.0	71.0
Spain	0.1	0.2	0.0	0.0	1.0	1.0
United States	2.4	2.6	5.0	8.0	12.0	13.0
France	0.5	1.1	2.0	2.0	3.0	3.0
Italy	0.1	0.3	1.0	1.0	1.0	1.0
Japan	0.2	0.1	0.0	1.0	1.0	1.0
Netherlands	0.6	0.7	1.0	1.0	1.0	1.0
Poland	0.0	0.0	0.0	0.0	0.0	0.0
Portugal	0.1	0.1	0.0	00	0.0	0.0
United Kingdom	0.4	1.1	2.0	3.0	3.0	4.0
Turkey	0.0	0.0	0.0	0.0	1.0	1.0

Source: Marklines

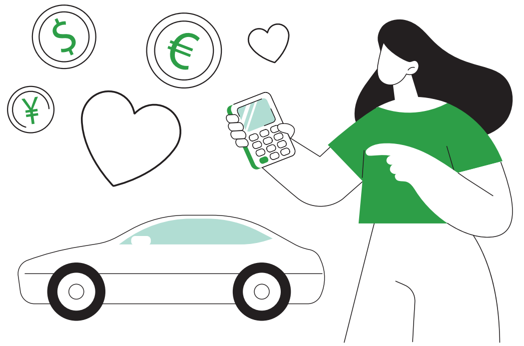
The main points of the Draghi report for the automotive industry

The report on the future of European competitiveness was presented by Mario Draghi to Ursula von der Leyen, President of the European Commission, on 9 September 2024. It contains 170 proposals, several of which concern the automotive sector.

- **Implementation of a Europe-wide plan to increase coordination in the value chain.**
- **Better coherence and predictability of regulations proportionate to the objectives pursued.**
- **Technology-neutral approach.**
- **A coherent digital policy for the automotive sector.**
- **Mobilising European savings to finance the automotive industry.**
- **Mandatory percentage of local content.**

2

Cars: Popular but Expensive



**We have lost count of the times that well-informed heralds have announced that cars are no longer popular and belong to a bygone era.
This new study by L'Observatoire Cetelem confirms what has already been confirmed on numerous occasions. Cars are as popular as ever.
But this capital drawn from satisfaction is marred by an obvious economic 'deficit'.
Cars are popular, but not at any price.**

Cars are still appealing

A POSITIVE IMAGE EVERYWHERE

In almost all the countries surveyed, 9 out of 10 people say they have a good or even excellent image of new cars. In Turkey, the response was almost unanimous, with 97% of respondents enthusiastic.

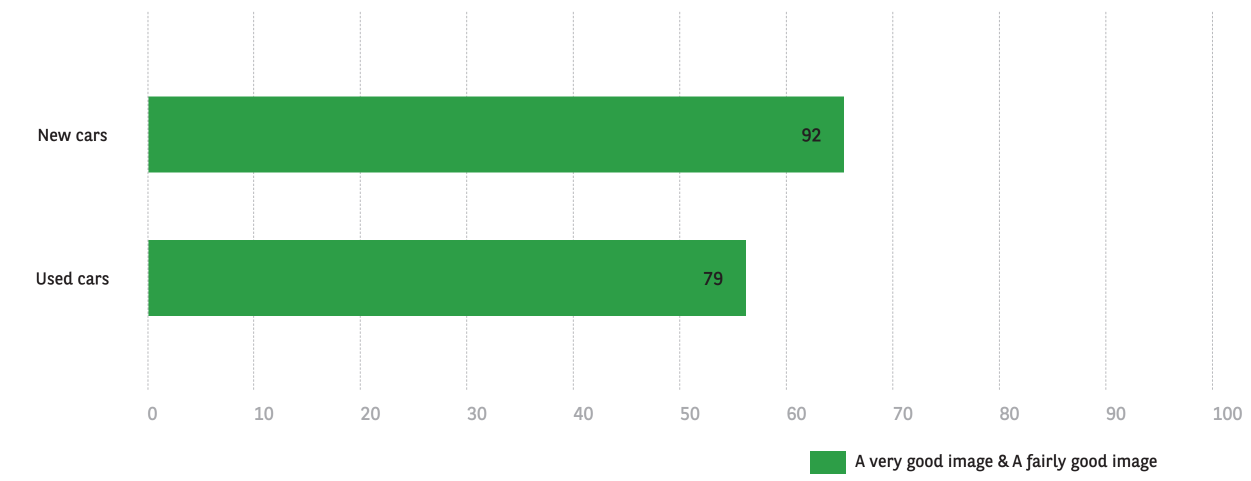
This image remains positive for used vehicles, albeit to a lesser extent. 8 out of 10 people say they are satisfied. This time, the differences between countries are more pronounced.
(Fig. 8).

The Dutch are 87% satisfied, while the Japanese are more reserved at 62%.
It's worth noting that used vehicles are more popular with young people and people living in rural areas, with price - the pivotal factor in this study - certainly playing a part.

Fig. 8

Overall, would you say that you have a good or bad image of...?

(Total countries in %) To all



Source: Observatoire CETELEM de l'automobile 2026

Positive media

Respondents believe that this positive image is effectively conveyed by the media. **(Fig. 9)**. 8 out of 10 people feel this way. In China, the score is even more impressive, with 90% in agreement. Germany and the United States provided slightly lower results (77%).

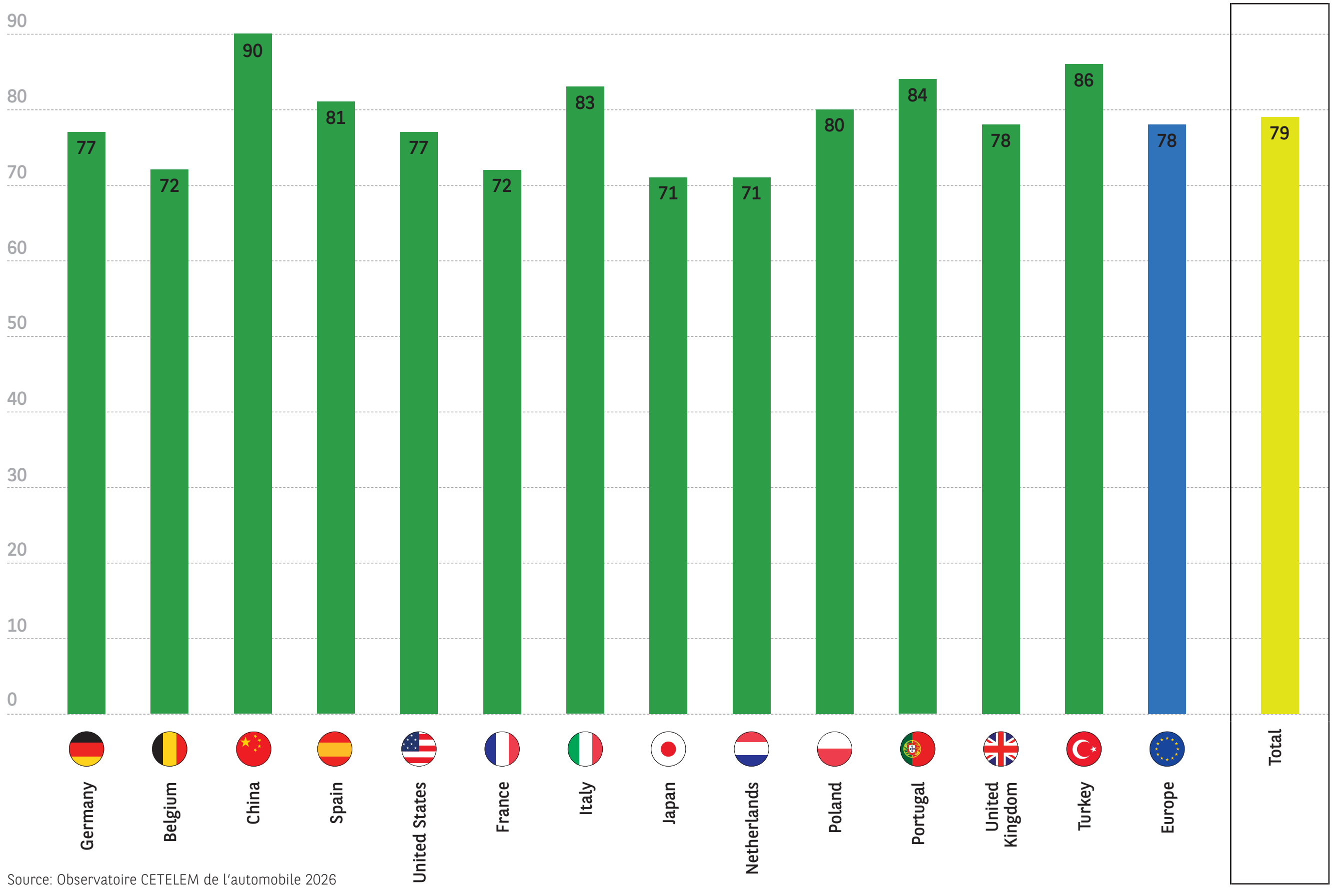
Although public authorities are also credited with spreading a positive image of the car (73%), opinions were more nuanced.

The Dutch are somewhat sceptical (58%), while the Chinese remain the most enthusiastic (89%).

Fig. 9

Would you say that the media contributes to spreading a good or bad image of new cars in your country?

(in %) All (A very good image & A fairly good image)



Source: Observatoire CETELEM de l'automobile 2026

Price, first and foremost

TOO MUCH IS TOO MUCH

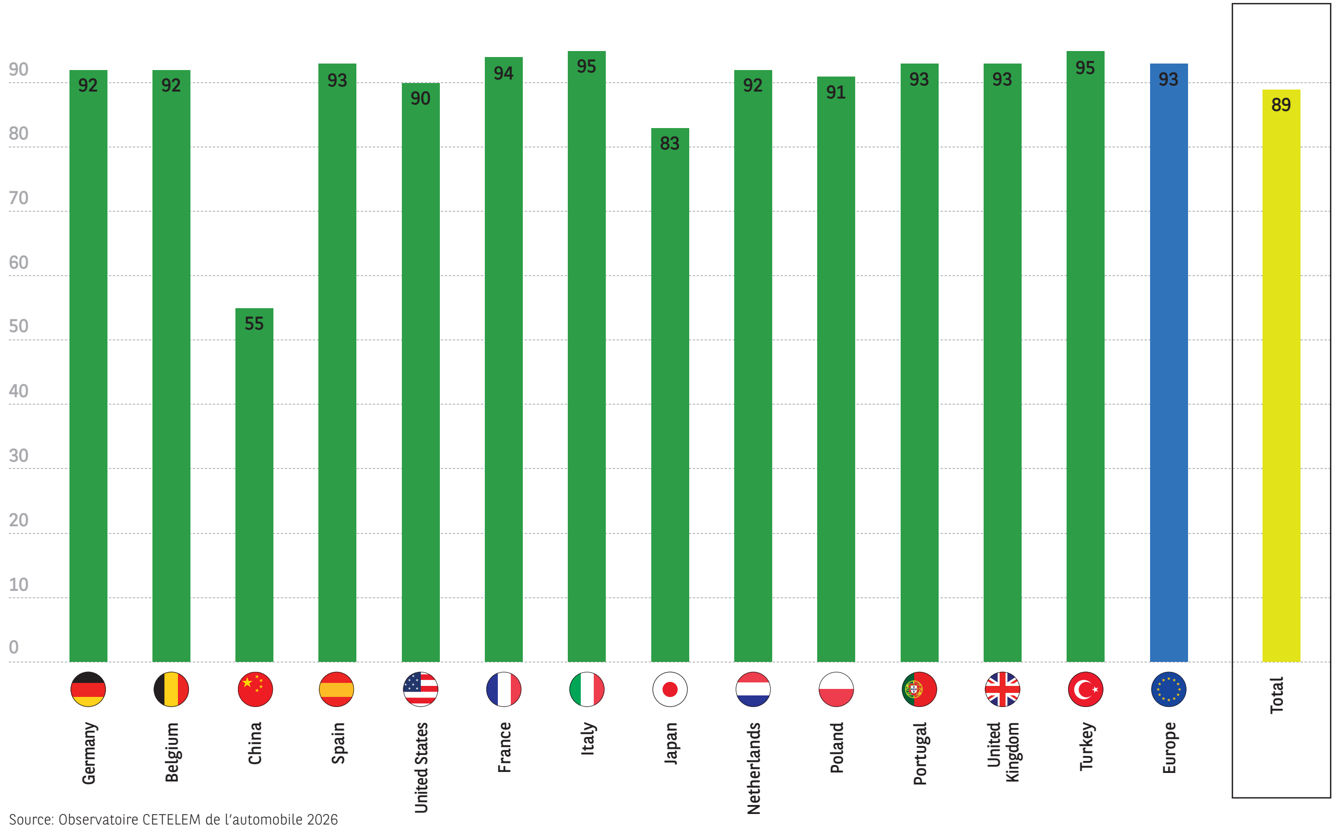
However, although cars may be popular, they are also, above all, considered too expensive. Here again, opinions are almost unanimous. On average, 9 out of 10 people say that new car prices are too high.

If China once again stands out, it is for expressing an opinion directly opposed to that of all the other countries in the study. Just over half of residents think that cars are too expensive. Neighbouring Asian country Japan also expresses a slightly more moderate opinion than the other nations as a whole (83%). **(Fig. 10)**.

Fig. 10

Would you say that the average price of new cars today is...?

(in %) All (Very high & Fairly high)



Source: Observatoire CETELEM de l'automobile 2026

Increases are noticeable…

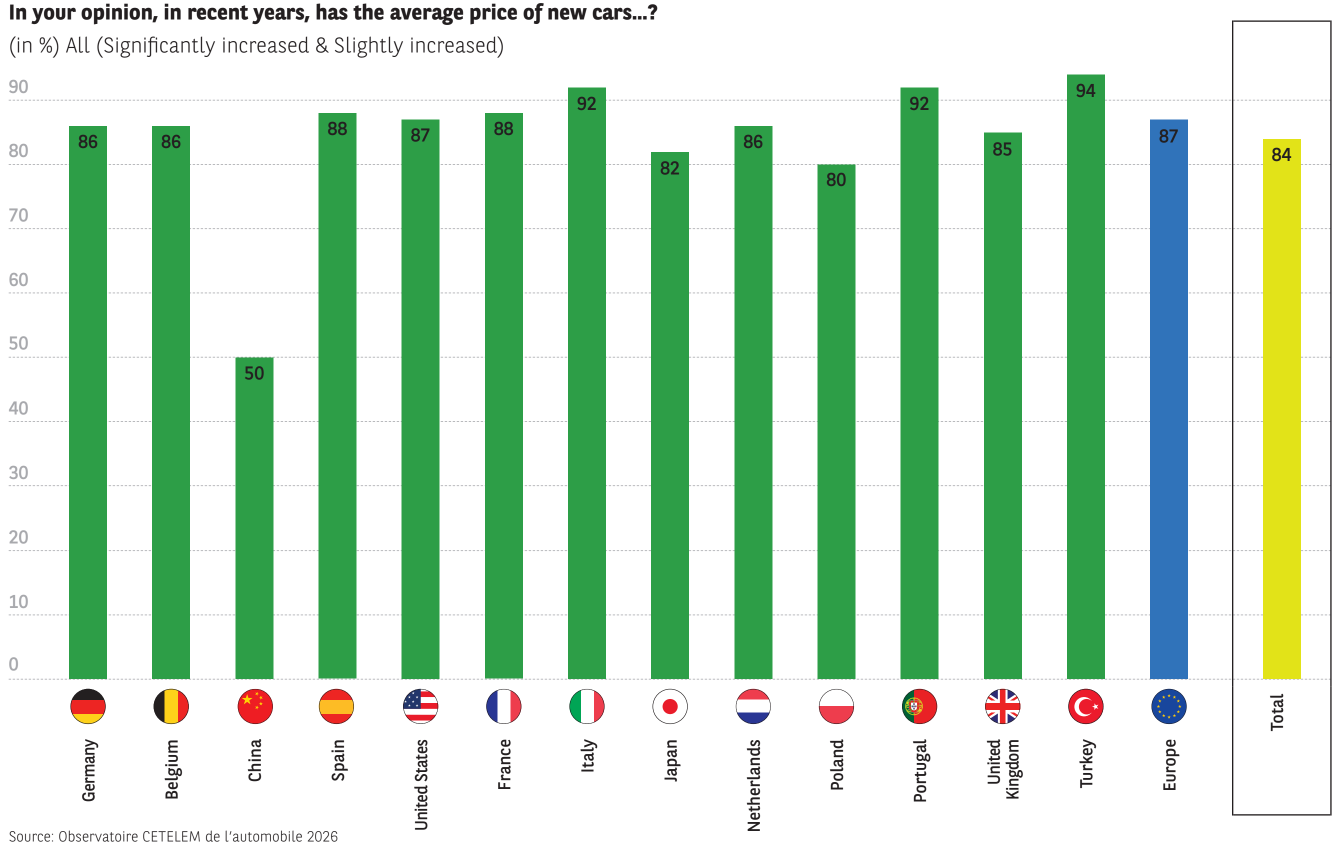
This perception of high prices is reinforced by the impression that car prices have done nothing but increase recently. 84% of those questioned were somewhat or totally convinced of the fact, particularly the Turks, Italians and Portuguese (94%, 92% and 92%).
What about China? Only half of Chinese people think that prices have risen in recent years.
Seniors are more likely to point out this price increase than younger people, as are people living in rural areas compared to those in large towns or cities.

These two categories, which often share common opinions, as observed in this study, are particularly sensitive to this increase because of the over-representation of seniors in rural areas. People on higher incomes are also more likely to notice this rise in prices.
Is this a paradox? Perhaps not, when you look at the changes in price lists for top-of-the-range cars in recent years, and when you realise that these social categories are the ones who change vehicles most often, and are therefore often in a good position to notice price increases. **(Fig. 11)**.

Fig. 11

In your opinion, in recent years, has the average price of new cars...?

(in %) All (Significantly increased & Slightly increased)



Source: Observatoire CETELEM de l'automobile 2026

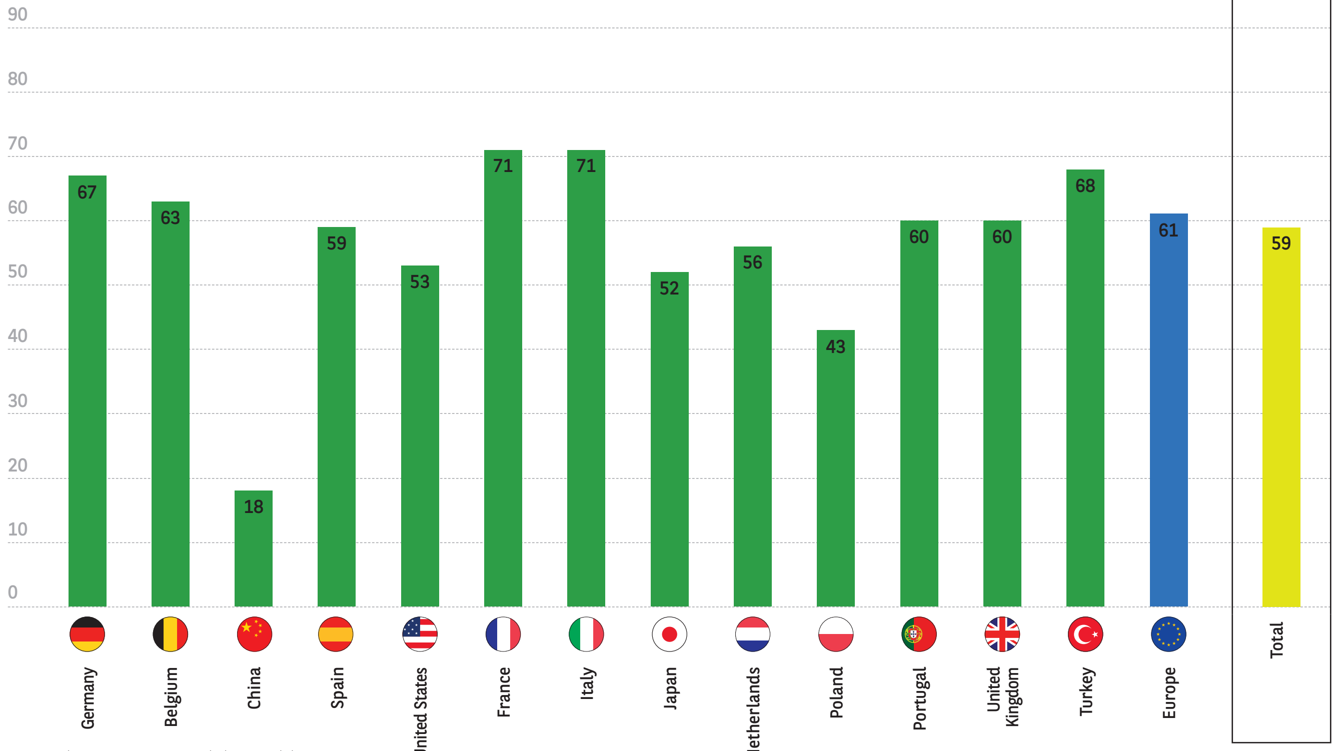
... and unjustified

For 6 out of 10 motorists, there is no justification for these increases, except in Poland and especially in China, the two countries where a majority approve (57% and 82%). They are particularly frowned upon in many European countries, especially France and Italy (71%). The under-30s stand out from all the other categories in this study in that the majority consider this price increase to be legitimate. **(Fig. 12)**.

Fig. 12

Do you think this increase in new car prices is justified or not?

To those who believe that the average price of new cars has risen in recent years. (Not at all justified & Not really justified).



Source: Observatoire CETELEM de l'automobile 2026

Good value for money still appreciated

NEW CARS THAT ARE TOO EXPENSIVE, WHOSE PRICE HAS RISEN IN RECENT YEARS, AND YET...

And yet, motorists are lowering the level of their complaints and raising the level of their satisfaction with vehicles' value for money. 6 out of 10 consider it to be good, which implicitly highlights the fact that the overall technological development of cars has been taken into account and that there has been a real improvement in quality. A group of four countries stands out for its value for money, with China and Turkey once again in the lead, followed by the United States and Japan.

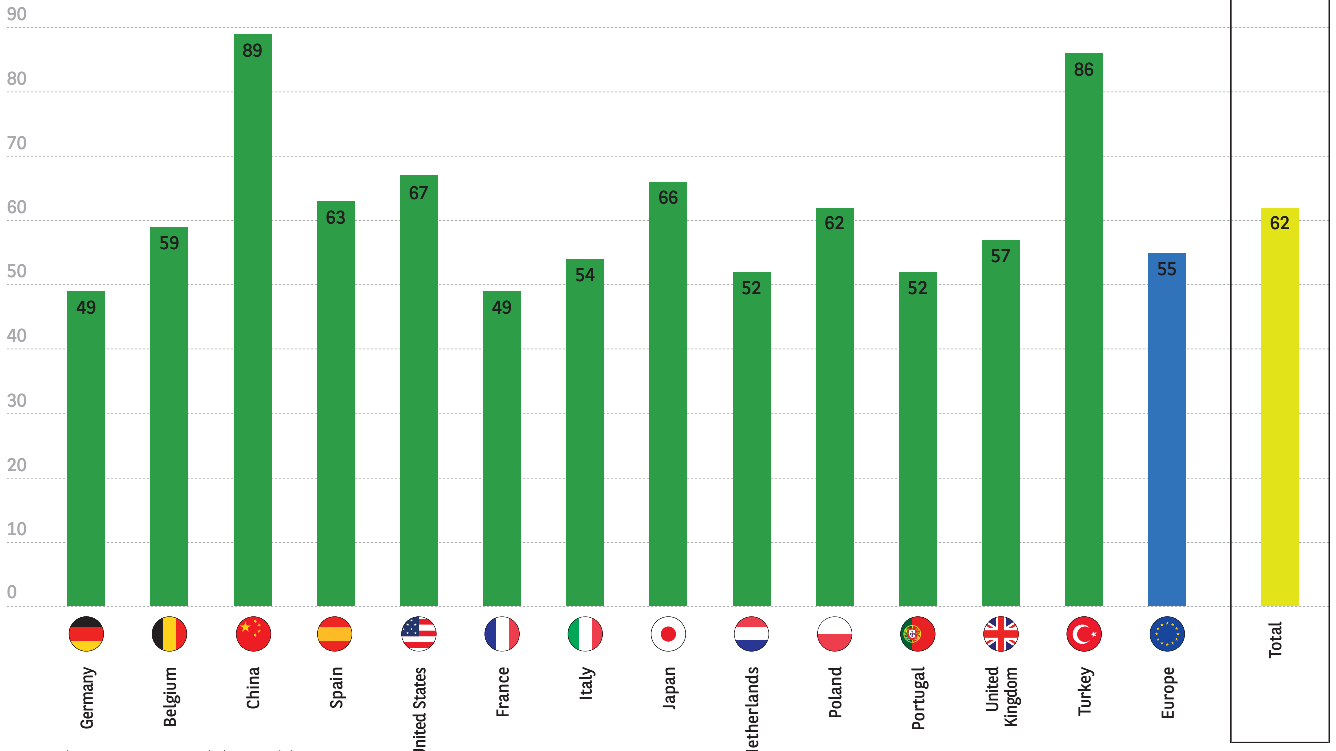
When looking at Europe, we encounter much more balanced points of view. France and Germany are united in being the most sceptical, with only 49% in favour, the only below-average score.

An encouraging sign for manufacturers in their efforts to retain customers is that younger people are more likely to praise cars' good value for money than older people. High-income earners and city dwellers are on the same wavelength. **(Fig. 13)**.

Fig. 13

Do you agree or disagree with the following statement: on the whole, new cars offer good value for money.

To all (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

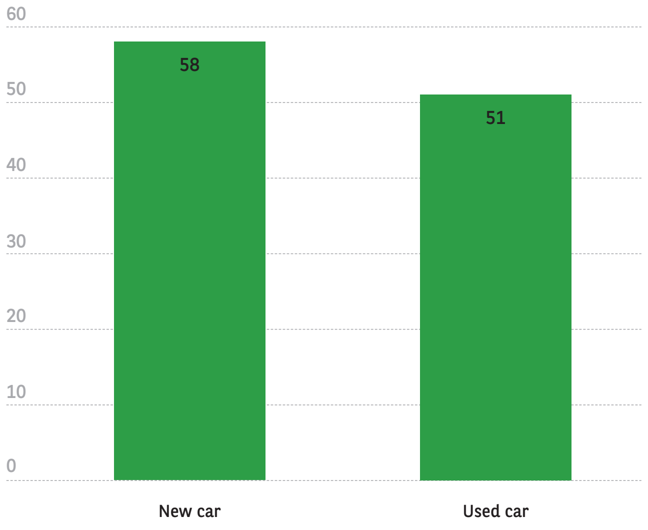
Purchases in the pipeline

Whether this is a coincidence or not, the score for value for money is almost the same as that indicating intentions to buy a new car in the next five years. 6 out of 10 people questioned reported this intention. However, the geographical distribution of these positive intentions is very different this time. Of course, the Chinese and Turks are enthusiastic about opening their wallets, and the Italians, Spanish and Americans are joining them in doing the same. Most wallets will remain closed in the Netherlands, Poland and Portugal, the only countries where purchasing intentions are below 50%. Slightly fewer people intend to buy a used car in the future (51%). Intentions are more similar across the various countries surveyed, with the exception of Japan, where only 27% of respondents are planning to make such a purchase. Given the economic situation, significantly more 18-29 year-olds want to buy a used vehicle (63%). **(Fig. 14)**.

Fig. 14

Do you plan to buy a car in the next 5 years?

(Total countries in %) - To all (Yes, definitely & Yes, probably)



Source: Observatoire CETELEM de l'automobile 2026

New cars: easy to resell

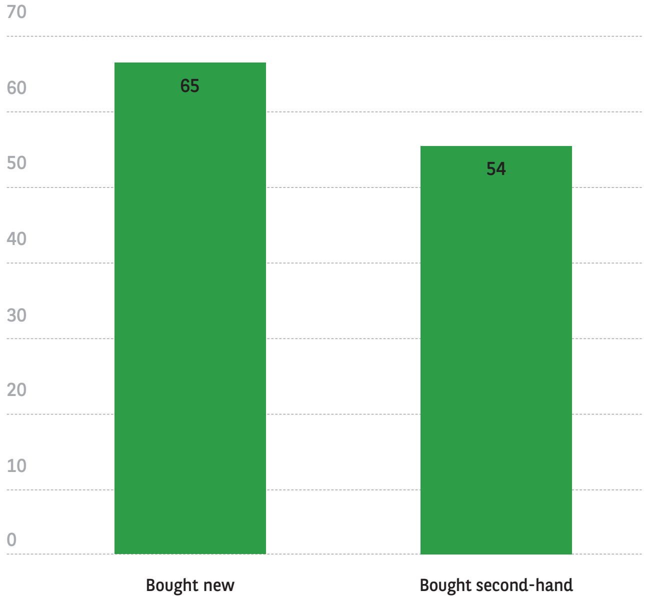
This positive outlook on future purchases is coupled with an even more favourable outlook in terms of resale, an argument that undoubtedly plays a role in the purchase of a new car.
65% of those questioned believe that it is now easy to resell a vehicle of this type.

The Chinese, Spanish, Americans and Turks are the leading experts in this field. In contrast, only 1 in 2 Japanese people view resale at a good price in a favourable light.
(Fig. 15).

Fig. 15

Would you say that it is now easy or difficult to sell a car at a good price?

(Total countries in %) - To all (Very easy & Fairly easy)



Source: Observatoire CETELEM de l'automobile 2026

A car costs money every day

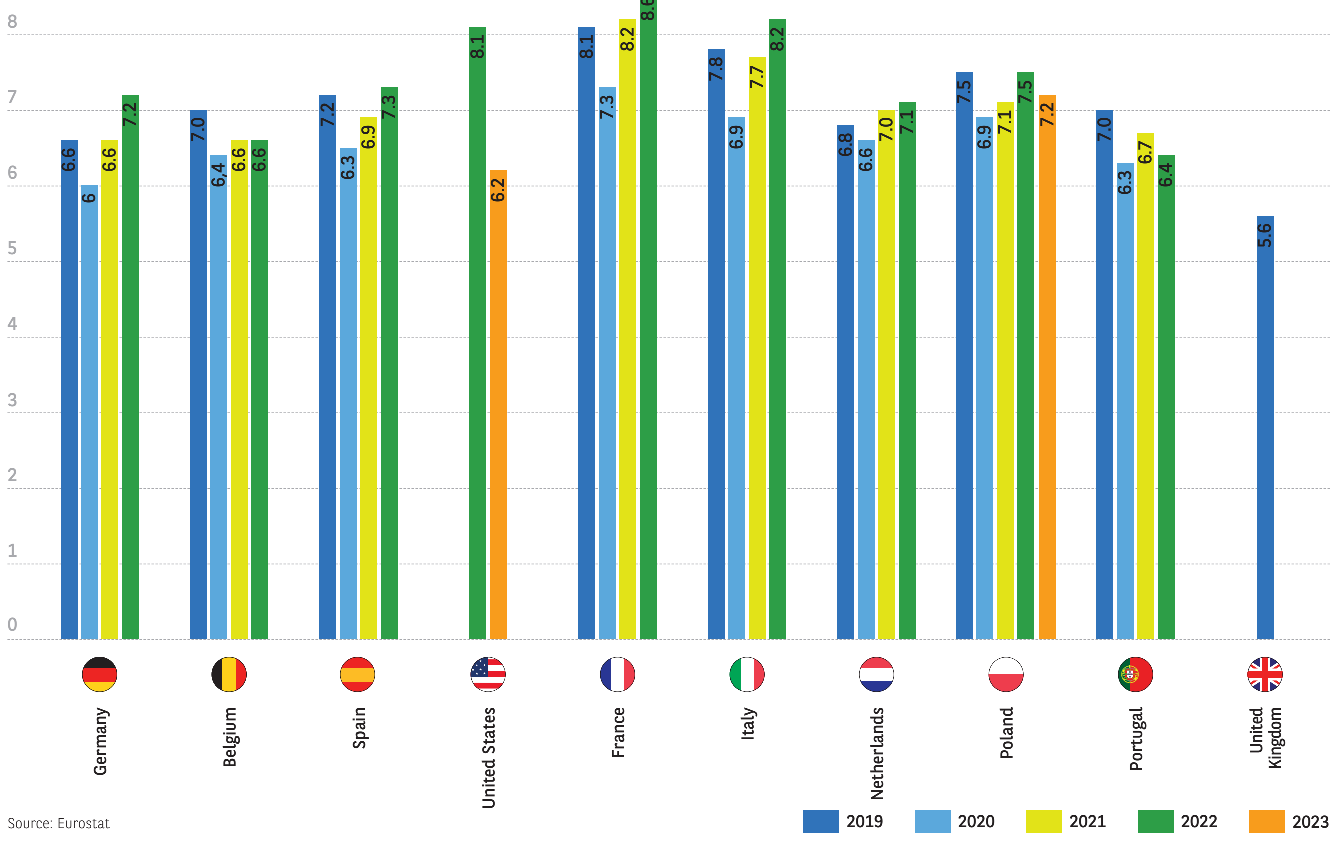
Since the health crisis, the financial burden of having a car has been increasingly felt in household budgets **(Fig. 16)** particularly in Europe. While the impact varies from country to country, it also depends on several factors:

- **intensity of use, even if mileage is on the decline,**
- **an ageing fleet, with a sharp rise in the cost of spare parts and labour, making maintenance more expensive,**
- **rise then fall in energy prices,**
- **insurance, parking, etc.**

Fig. 16

Household final consumption expenditure: use of a personal vehicle.

(as a % of total consumption)



Source: Eurostat

KEY DATA

9 out of 10 people
have a good image of new cars

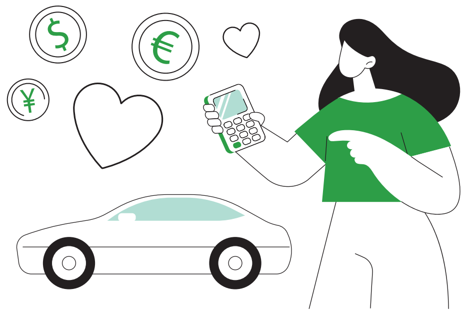
For 6 out of 10 people
these increases are not justified

9 out of 10 people
also think their price is too high

6 out of 10 people
are satisfied with their value for money

84%
of those questioned believe that their price has risen in recent years

65%
think it is easy to resell a new vehicle today



3

Manufacturers and Public Authorities: Key Players in Bouncing Back

If the automotive industry is to bounce back effectively and sustainably, it needs players who can activate the levers to do so. This new study by L'Observatoire Cetelem clearly identifies two: manufacturers and public authorities. An inseparable pair, which motorists hope are united for better, and not for worse. A pair with serious assets to help them succeed, but with uneven support for those assets.

An active duo on the front line

MANUFACTURERS AND GOVERNMENTS: IT'S UP TO THEM TO ACT

When motorists were asked about the entities that could ensure the recovery of the market, two stood out. In their view, manufacturers and governments have a vital role to play in creating this momentum.
Car manufacturers are clearly in the lead, garnering a third of opinions. In all countries except Turkey and China, they are the first choice, with very high scores especially in Japan, but also in Germany, the Netherlands, the United States and the United Kingdom.

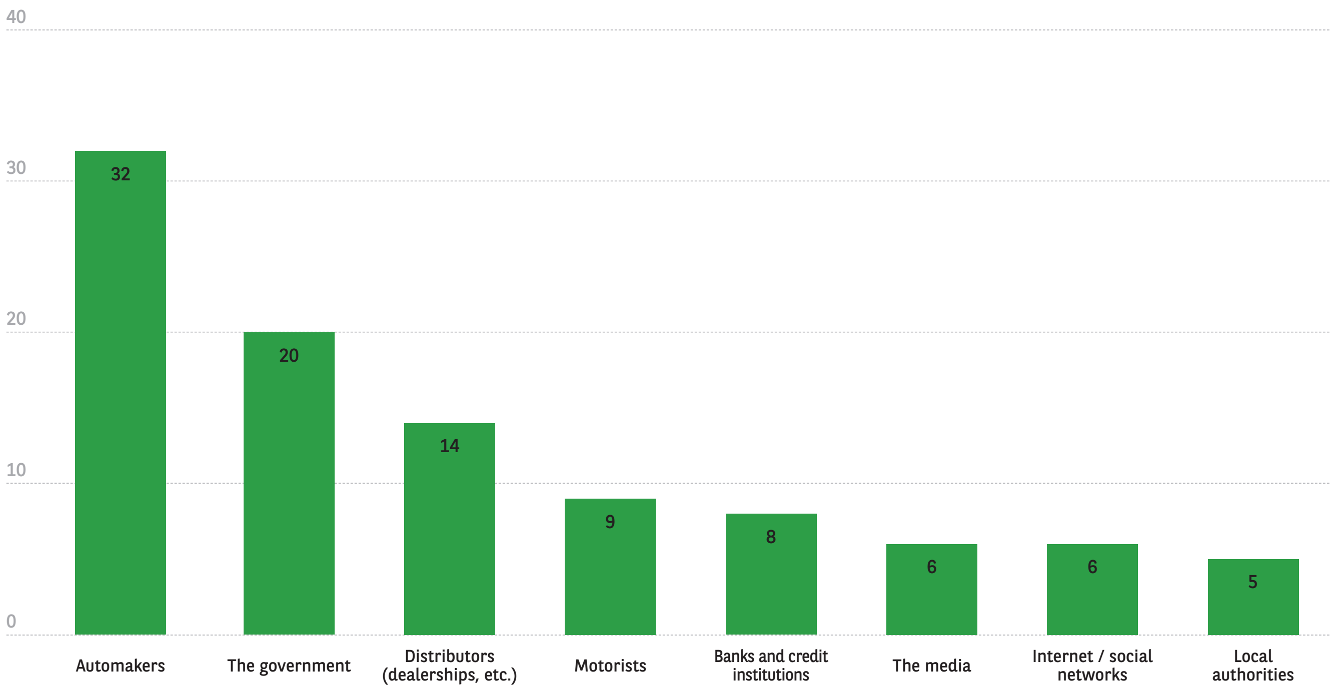
Our previously mentioned pair of categories, senior citizens and people living in rural areas, clearly show their preference. In second place in this ranking, governments received an average of 1 vote out of 5. While China and Turkey have made this their first choice, the liberal Anglo-American pair are clearly rejecting the idea.

Note that distributors are clearly in third place: we will cover them in the fourth part of the report, discussing the role they can play as a lever for recovery. **(Fig. 17)**.

Fig. 17

In your opinion, which player should take a priority role in revitalising the new car market?

in % (Total countries) - To all - First



Source: Observatoire CETELEM de l'automobile 2026

Relatively positive public support for manufacturers

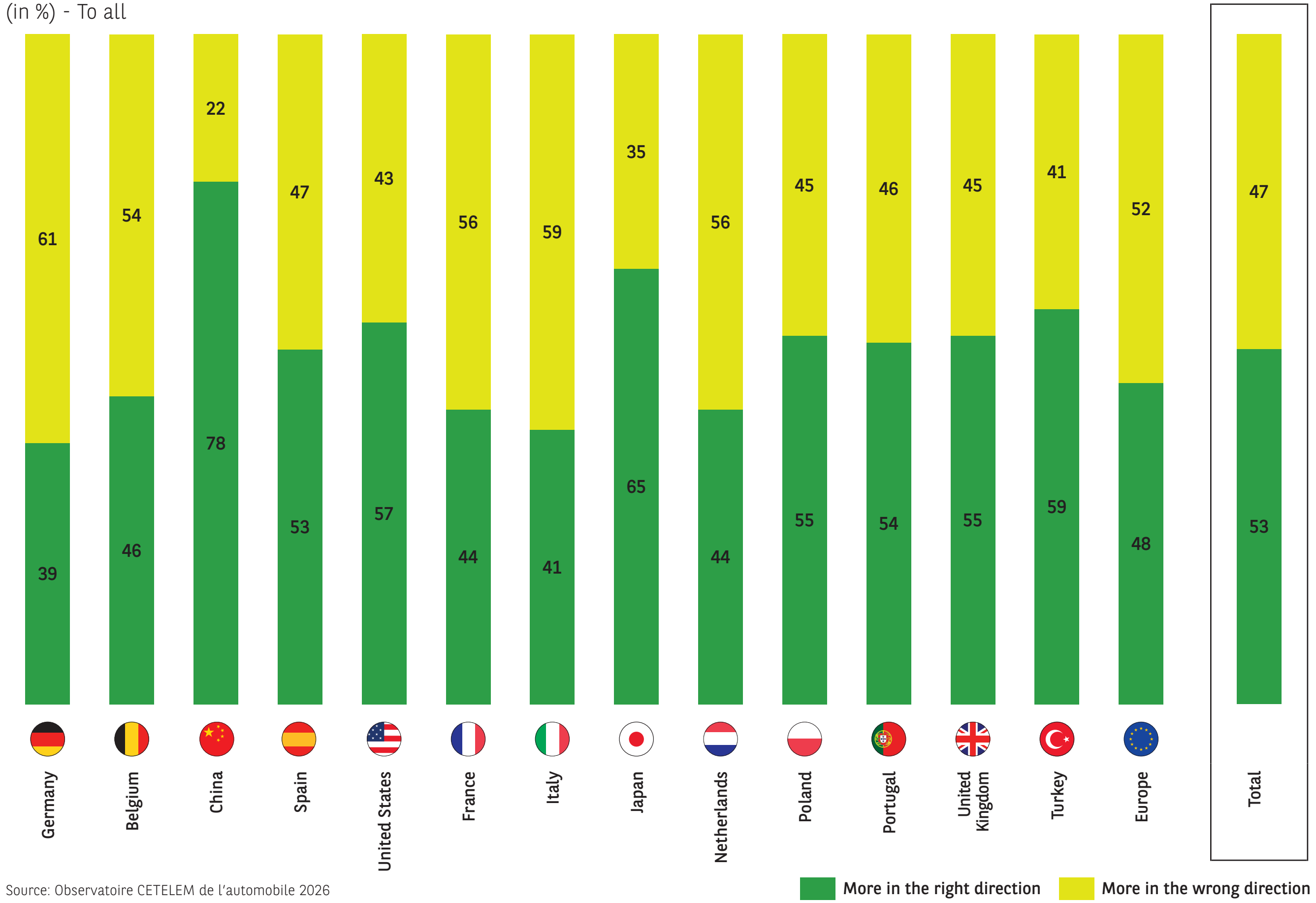
The combination of these two may seem promising, given the support extended to manufacturers through public policy. Slightly more than 1 in 2 people think they are heading in the right direction. However, geographical location is also crucial.

Several European countries with national brands, including Germany, France and Italy, have joined forces to question their relevance. This is in stark contrast to Asian neighbours China and Japan, who have no doubts about their effectiveness. **(Fig. 18)**.

Fig. 18

Would you say that public policy today is moving in the right direction or the wrong direction for car manufacturers?

(in %) - To all



Source: Observatoire CETELEM de l'automobile 2026

Attractive car manufacturers

MANUFACTURERS ARE STILL POPULAR

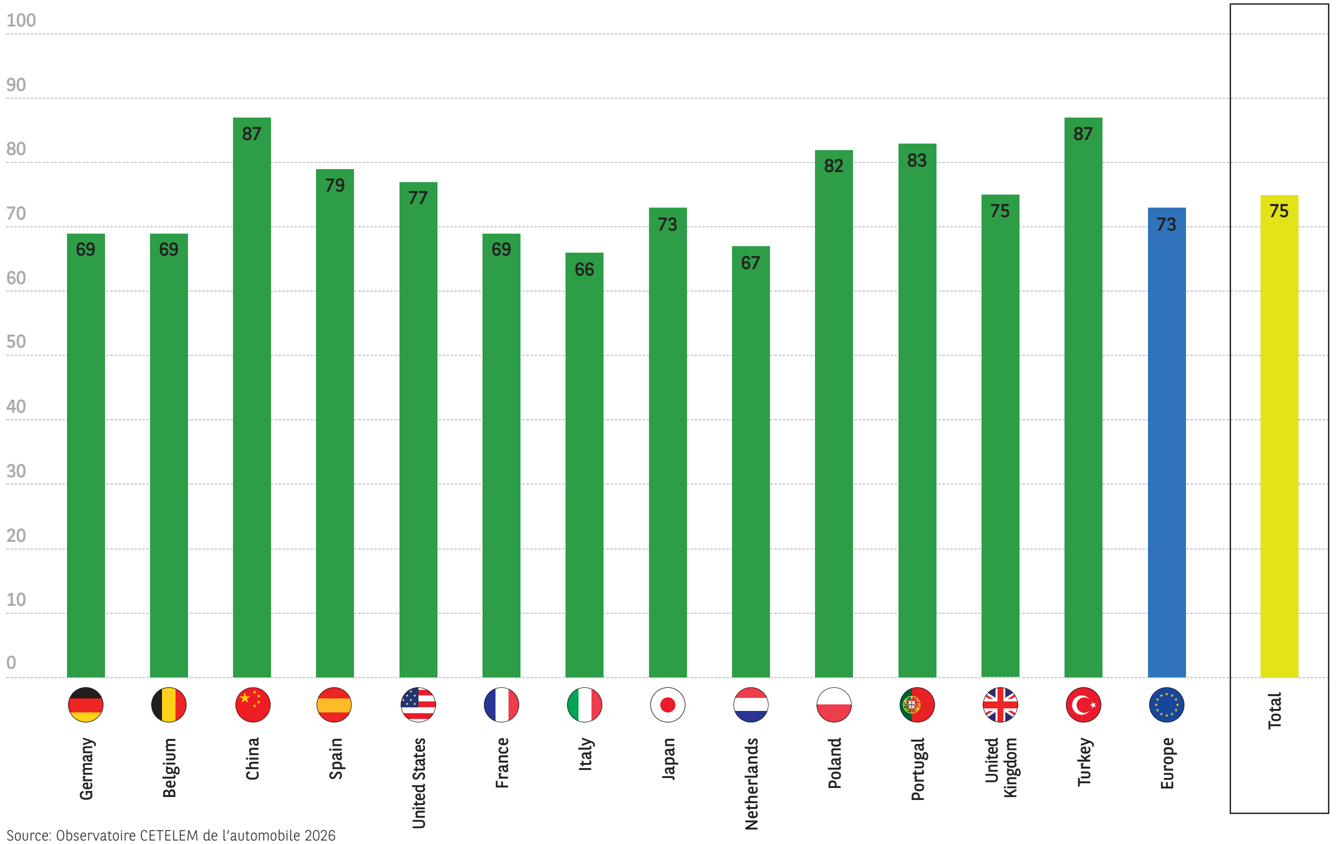
As we saw earlier, new cars are unanimously, or almost unanimously, praised: car manufacturers largely garner the same praise. 3 out of 4 people surveyed have a good or excellent image of them **(Fig. 19)**, their biggest supporters still being the Chinese and the Turks (87%).

The same European front brings together motorists who are a little less enthusiastic, particularly in Italy. We shall see that they point to an excessive increase in their margins. Conversely, city dwellers and high-income earners are very sympathetic to car manufacturers.

Fig. 19

Overall, would you say that you have a good or bad image of car manufacturers?.

(in %) - To all (A very good image & A fairly good image)



Source: Observatoire CETELEM de l'automobile 2026

A strong attachment to brands

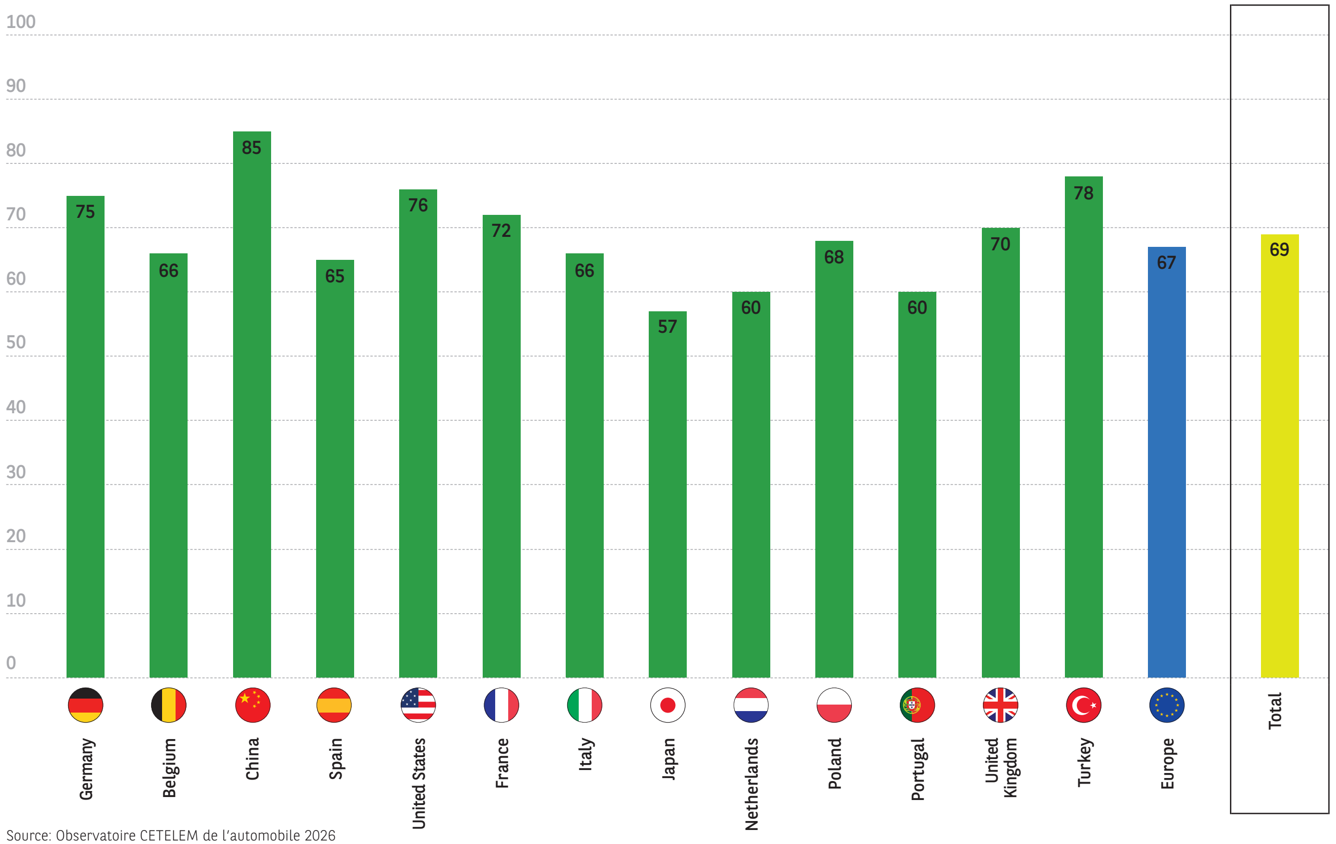
This sympathy for manufacturers is combined with an attachment to the brands they make. **(Fig. 20)**.
7 out of 10 people say so, with China and Turkey still in the lead, but this time followed by a significantly different ranking.

Three countries with long-standing, strong brands are particularly attached to them: United States, Germany and France.

Fig. 20

To what extent do you agree with the following statement? I am very attached to certain car brands.

(in %) To those who have at least one car in their household. (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

More commitment and clarity required from governments

AN IMPERATIVE REVIVAL

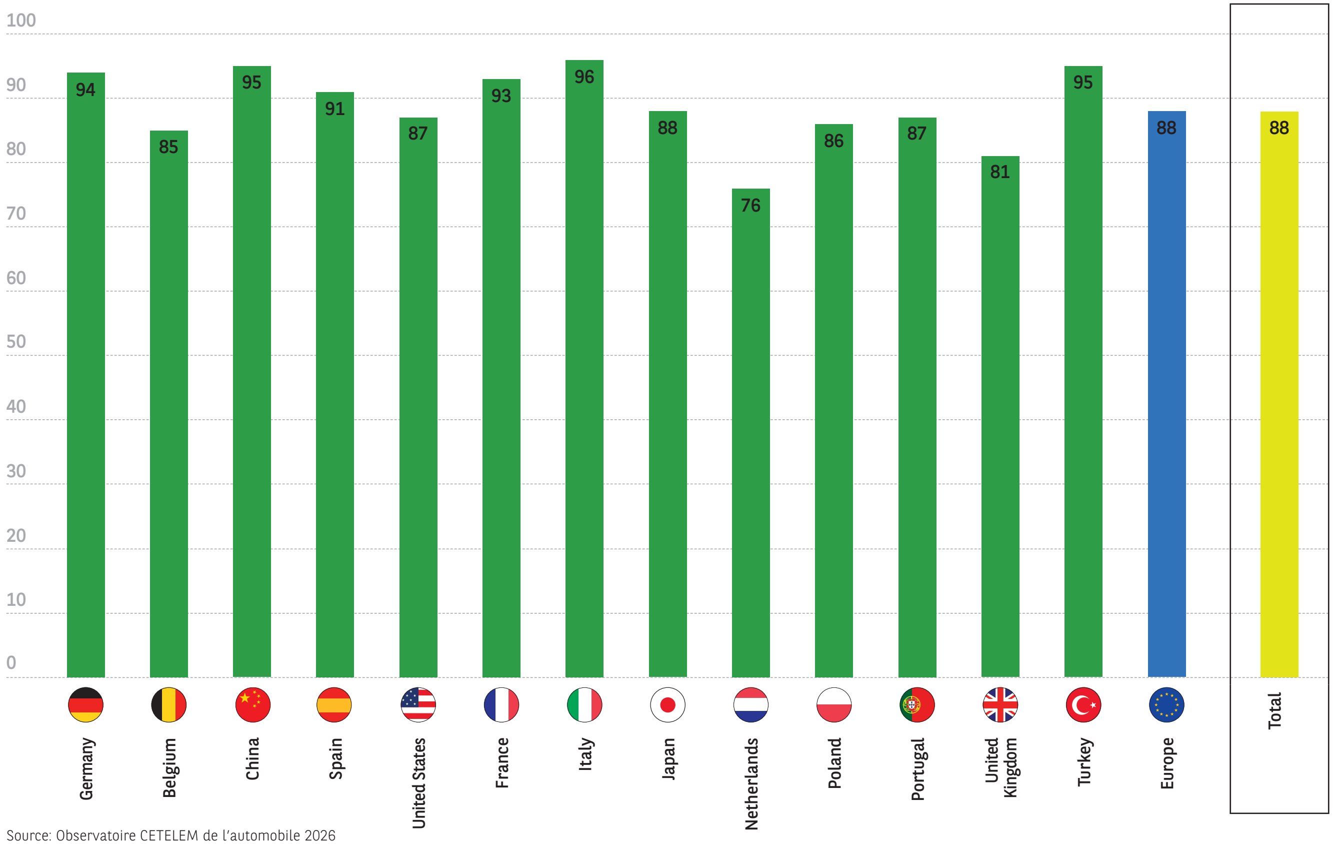
Cars we love... Manufacturers we appreciate... And a market that needs to be revived. 9 out of 10 people questioned said so, mainly in countries with strong brands and a large car industry. **(Fig. 21)**.

Only the champion of cycling, the Netherlands, is more moderate in its enthusiasm (76%). Another piece of good news for the sector is that young people are the most supportive of this drive for recovery, as are city dwellers and high-income earners. It should be noted, however, that for half the people questioned, while this revival is important, it is not a priority.

Fig. 21

We need to revive the new car market.

(in %) - To all (A priority & Important, but not a priority & Secondary)



Source: Observatoire CETELEM de l'automobile 2026

Don't forget the environment...

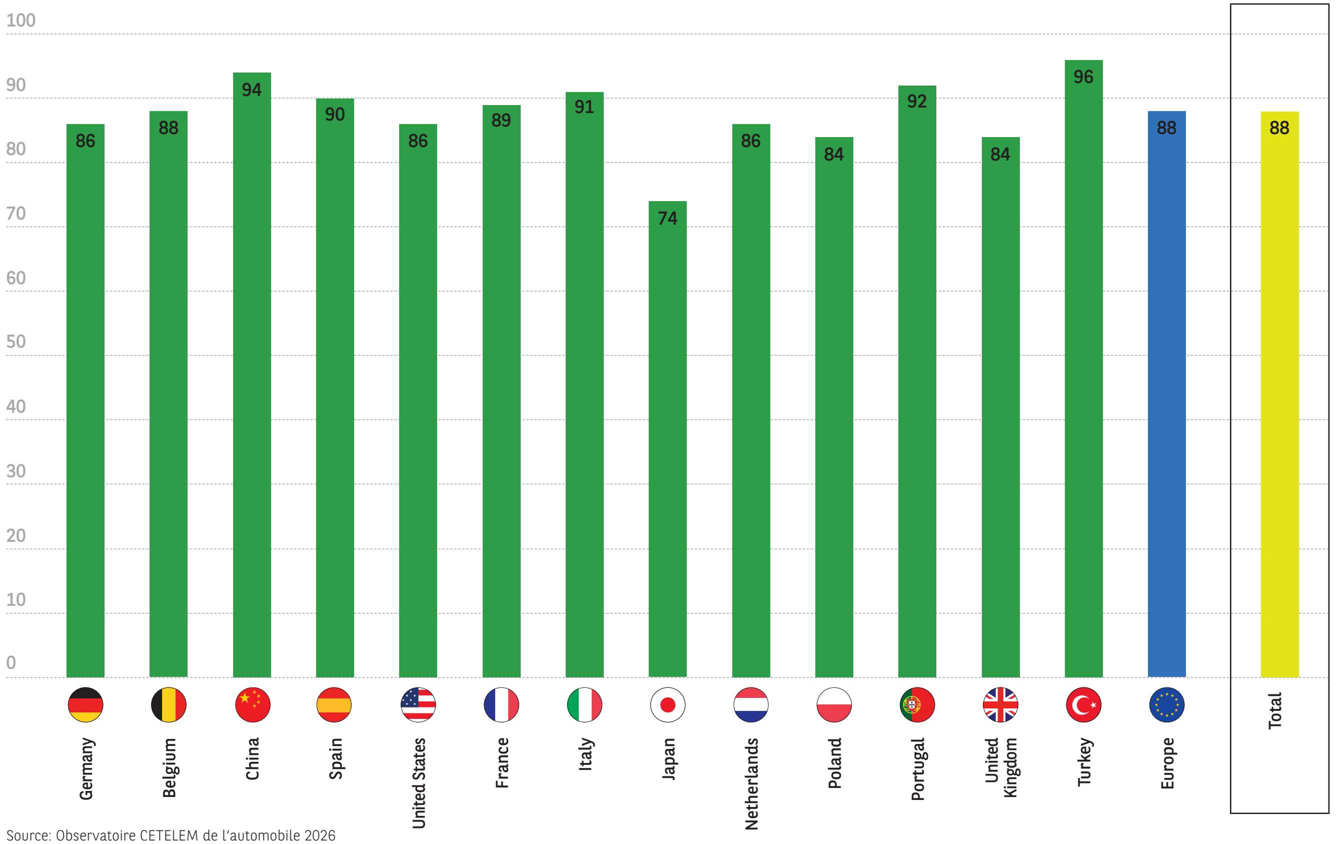
However, this revival must be green, and not at any cost. 9 out of 10 people think it is important to reduce the environmental impact of new vehicles, although half of the respondents do not consider this to be a priority. **(Fig. 22)**.

The views expressed in the different countries are relatively equivalent, with the Japanese being the least likely to mention this importance.

Fig. 22

In your opinion, is reducing the environmental impact of cars a top priority, important but not a priority, or a secondary priority?

(in %) - To all (A top priority & Important but not a priority)



Source: Observatoire CETELEM de l'automobile 2026

… with relatively positive policies

When asked about this issue, a small majority of respondents believed that public policy is heading in the right direction. **(Fig. 23)**.

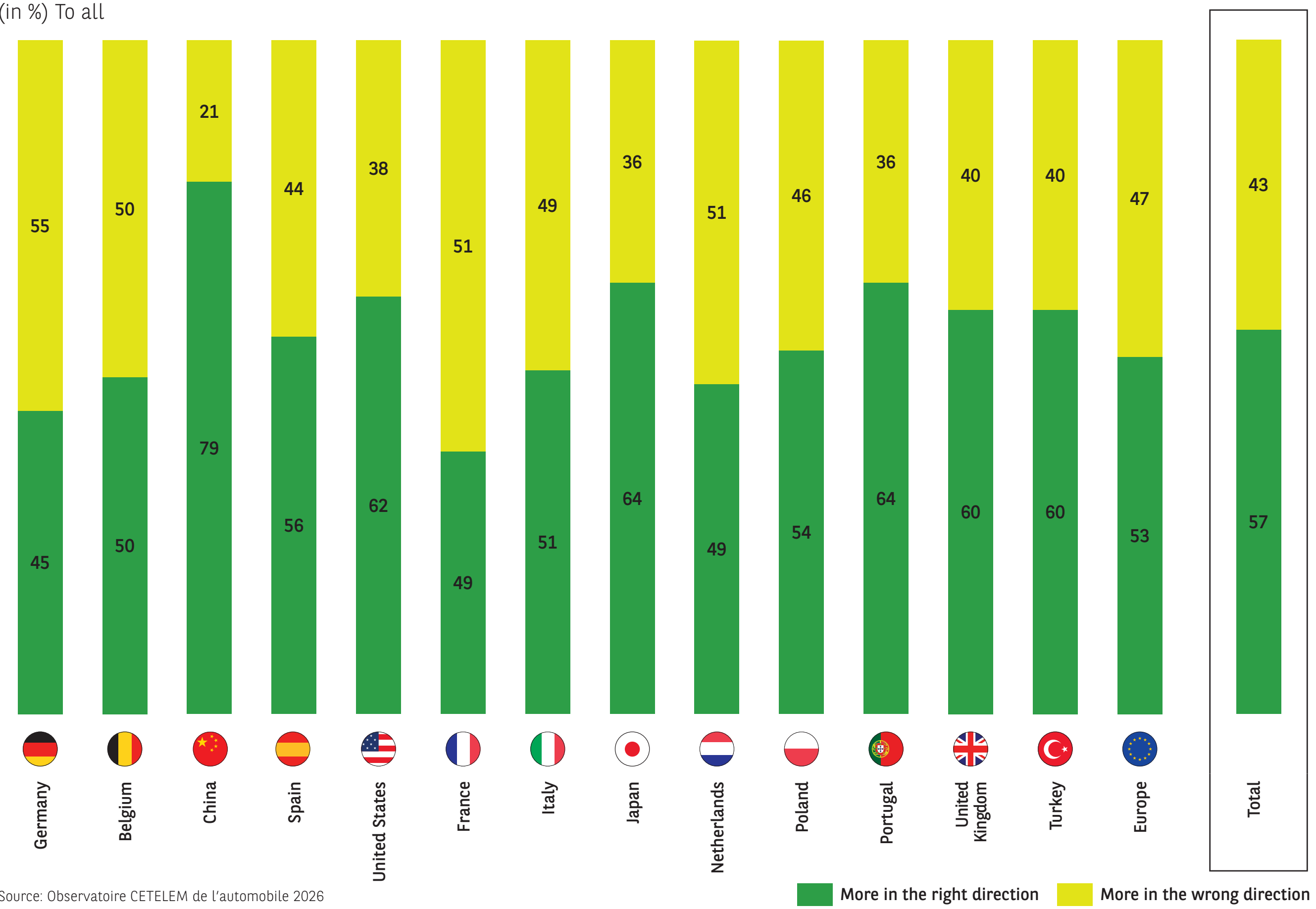
At the risk of repeating ourselves over and over again, while the Chinese are still the most enthusiastic, many European countries are reluctant to define them as positive.

In Germany, France and the Netherlands, this view is even in the minority.

Fig. 23

Would you say that public policy today is moving in the right direction or the wrong direction when it comes to the environmental impact of cars?

(in %) To all



Source: Observatoire CETELEM de l'automobile 2026

Unclear and unstable help-to-buy policies

The issue of the environment raised doubts about the positive intentions of public policies. Another issue, linked to the purchase itself, confirms that these policies certainly lack clarity. 7 out of 10 respondents said that help-to-buy policies were definitely opaque, with Portugal and Japan leading the way in this opinion. **(Fig. 24)**.

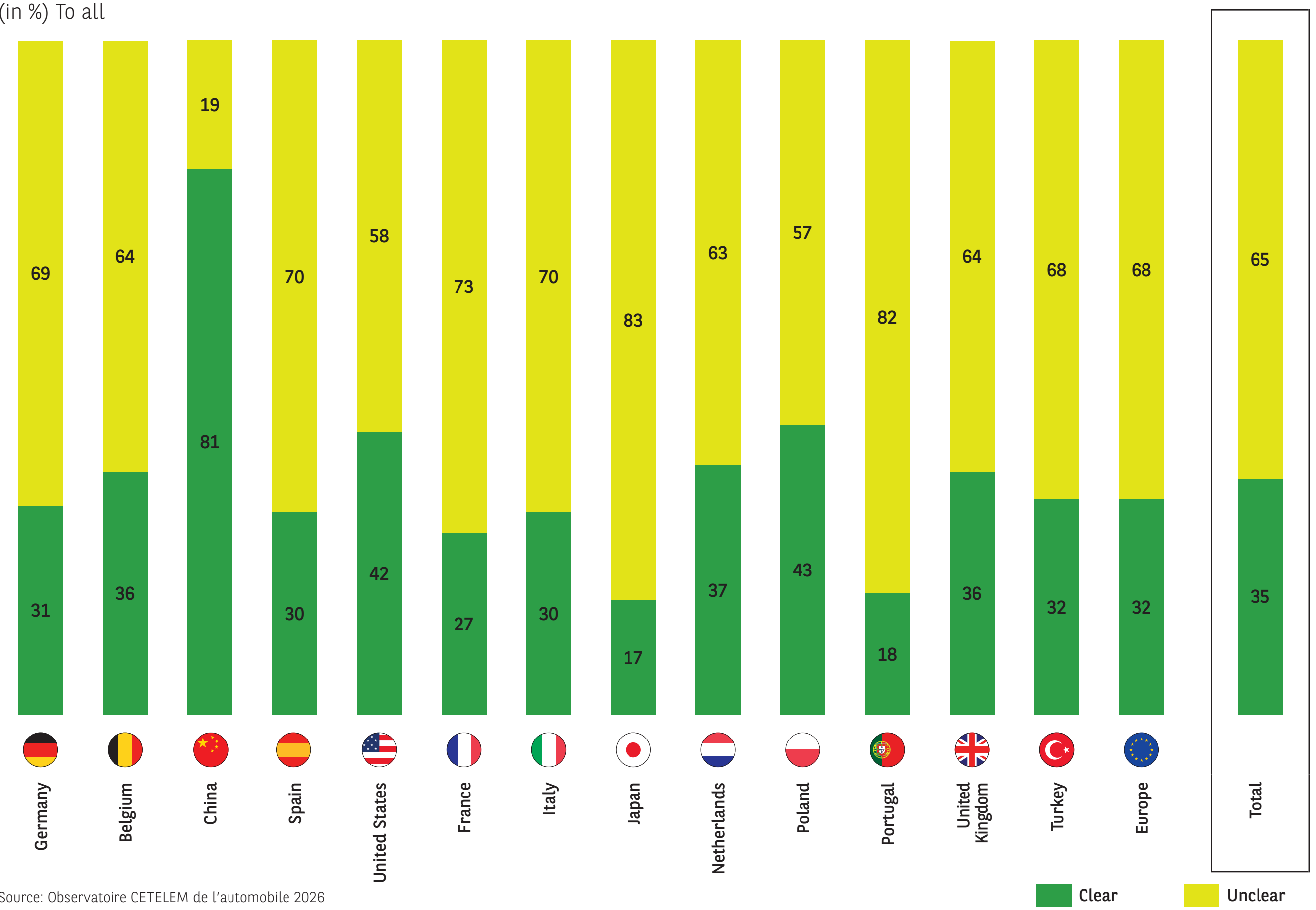
Most European car-producing nations, particularly France, share this view.

Is there a country where everything is clear and there is no room for doubt? China, of course. Seniors and residents of towns and rural areas are the most vocal critics of public policies directed at the purchase of cars.

Fig. 24

Would you say that public policies on buying a new car (help-to-buy subsidies, incentives, etc.) are…?

(in %) To all



Source: Observatoire CETELEM de l'automobile 2026

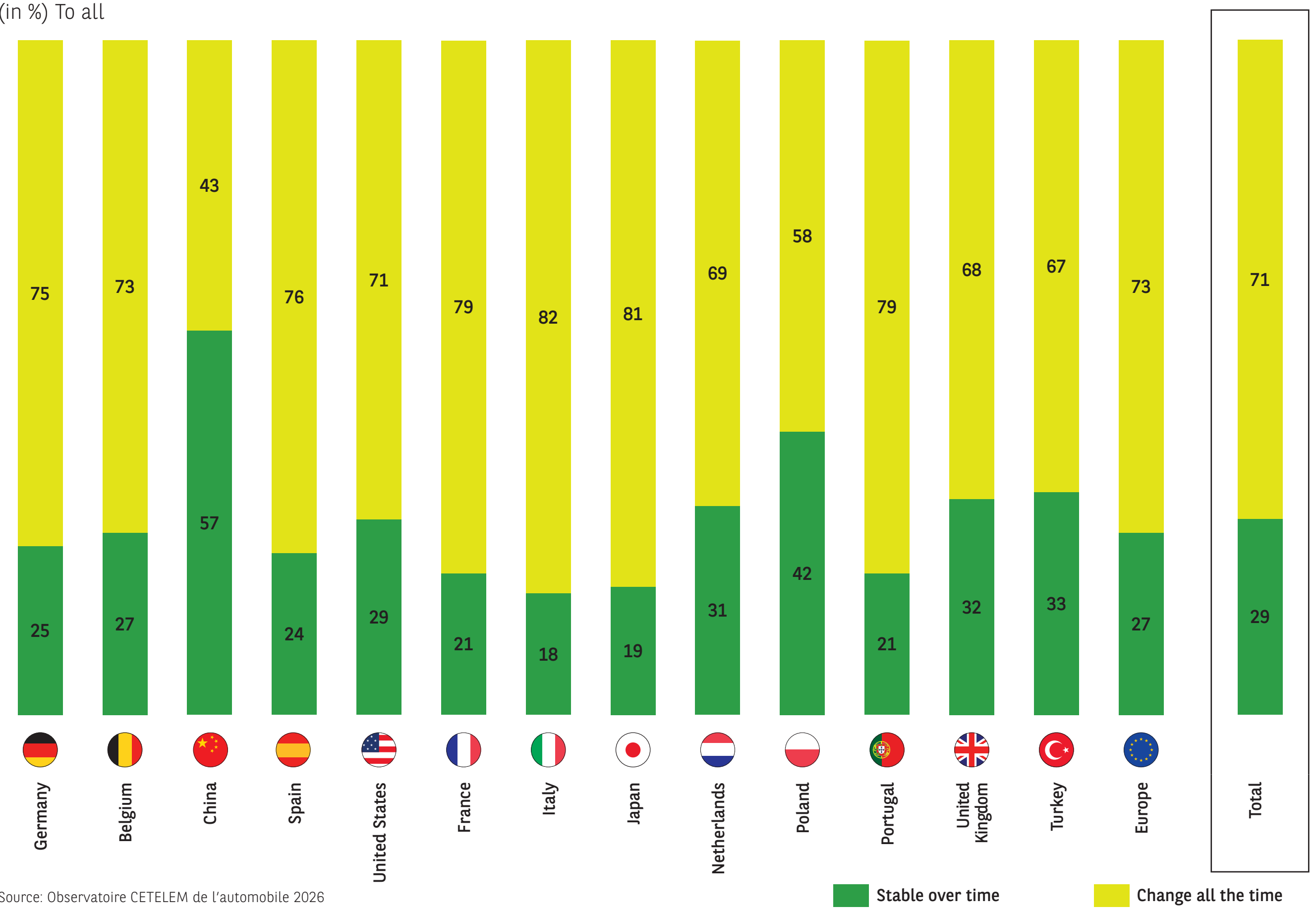
This criticism surrounding the policies' lack of clarity is bolstered by another criticism, that of instability, with the latter leading to the former. Here again, in all countries except China, a clear majority point to this instability. **(Fig. 25)**.

Japan, Italy, France and Portugal are the most vocal critics of this instability.
Seniors and people living in rural areas once again stand out as adopting the same position.

Fig. 25

Would you say that public policies involving the purchase of a new car (help-to-buy subsidies, incentives, etc.)...?

(in %) To all



Source: Observatoire CETELEM de l'automobile 2026

KEY DATA

1 in 2 people
think that public policies towards car manufacturers are heading in the right direction

3 out of 4
have a good image of manufacturers

7 out of 10
are attached to brands

9 out of 10
believe that the market needs to be revived

9 out of 10
consider it important to reduce the environmental impact of new vehicles

7 out of 10
think that public help-to-buy policies are unclear and unstable

4

Five Ways to Bounce Back

Faced with a car market that is going through a crisis of varying intensity, measures are expected and a revival is hoped for. By listening to motorists and gathering their opinions in a number of countries that account for most of the world's car production and sales, L'Observatoire Cetelem has identified five levers capable of revitalising the market. These five areas should be the focus for more effective action.

1. Price

BOOSTING GROWTH BY OFFERING CHEAPER CARS

We have already seen the importance attached to the price of cars, with their ever-increasing cost being denounced in all countries except China. It's hardly surprising that lowering vehicle prices is the first lever identified.

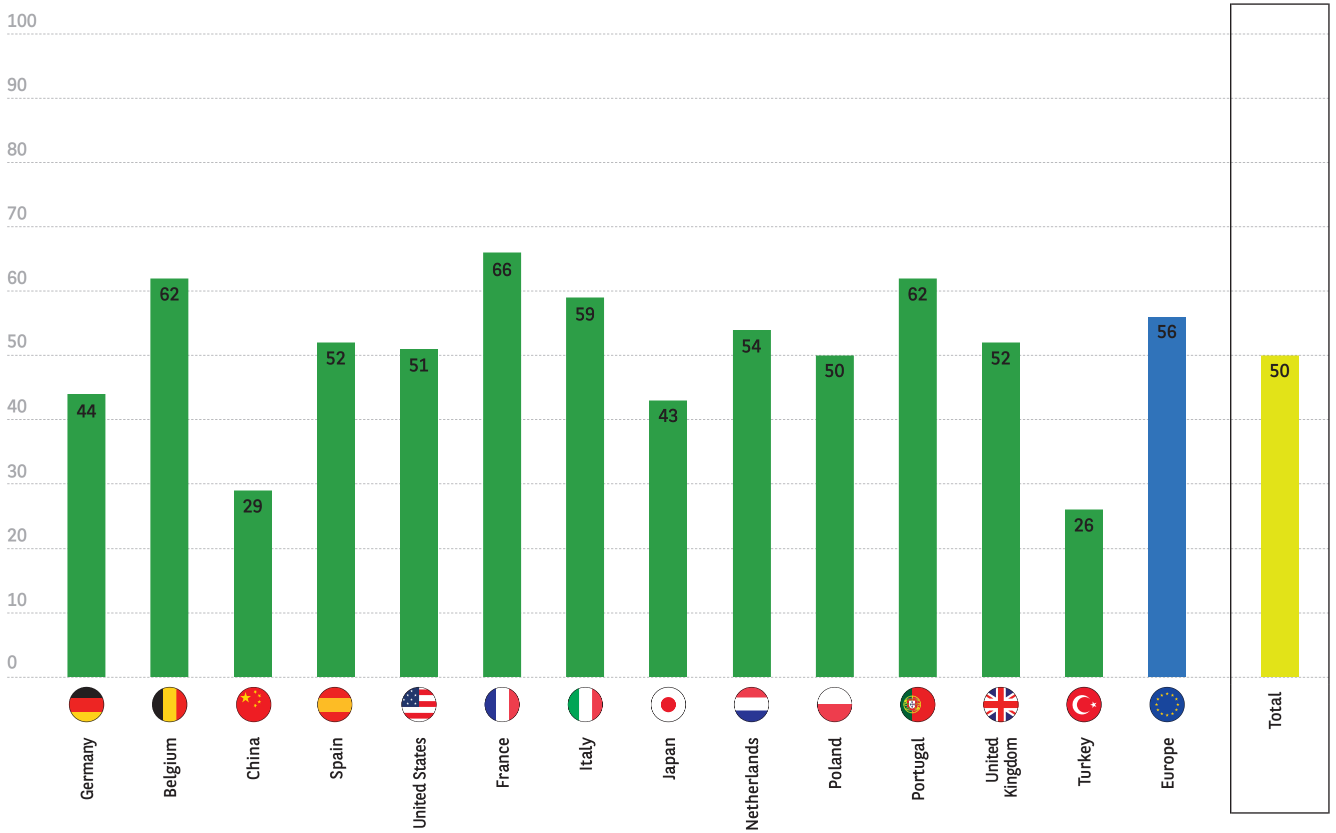
Making cheaper and simpler cars is a priority for 1 in 2 people in order to revive the market. **(Fig. 26)**.

This opinion is most strongly expressed in France, while it is less popular in Turkey, China and Germany, the home of expensive saloon cars and SUVs. Seniors are very sensitive to this issue, as are people on modest and median incomes, and people living in rural areas.

Fig. 26

What do you think should be the top priority to revive the new car market?
'Offer new cars that are less expensive but simpler in terms of fittings, design, power, etc.'

(in %) To all - First



Source: Observatoire CETELEM de l'automobile 2026

Lowering purchase and maintenance costs

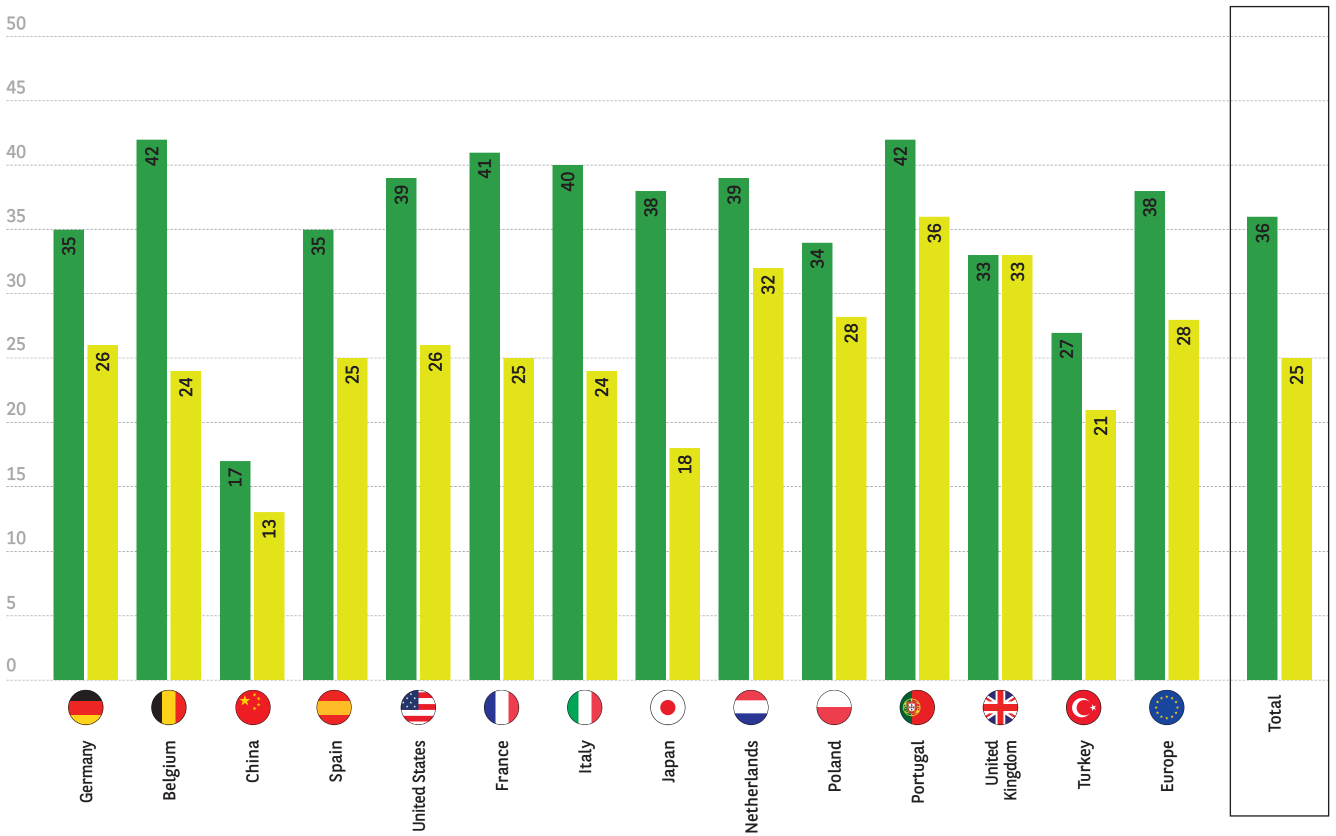
This focus on price is also expressed through people's appreciation of a cost of purchase that is compatible with their budget, as well as to limited maintenance costs. Only safety comes between these two aspects in the ranking of purchasing criteria.

Except in Japan, China and Poland, price always comes out on top. Seniors and people living in rural areas are the most sensitive to this factor. Particular attention is paid to maintenance costs in Poland, the Netherlands and the United Kingdom. This criterion is not given much prominence in China, where the electrification of vehicles generates lower costs. **(Fig. 27)**.

Fig. 27

If you were to buy a new car, what would be your top three buying criteria from the following list?

(in %) To all



Source: Observatoire CETELEM de l'automobile 2026

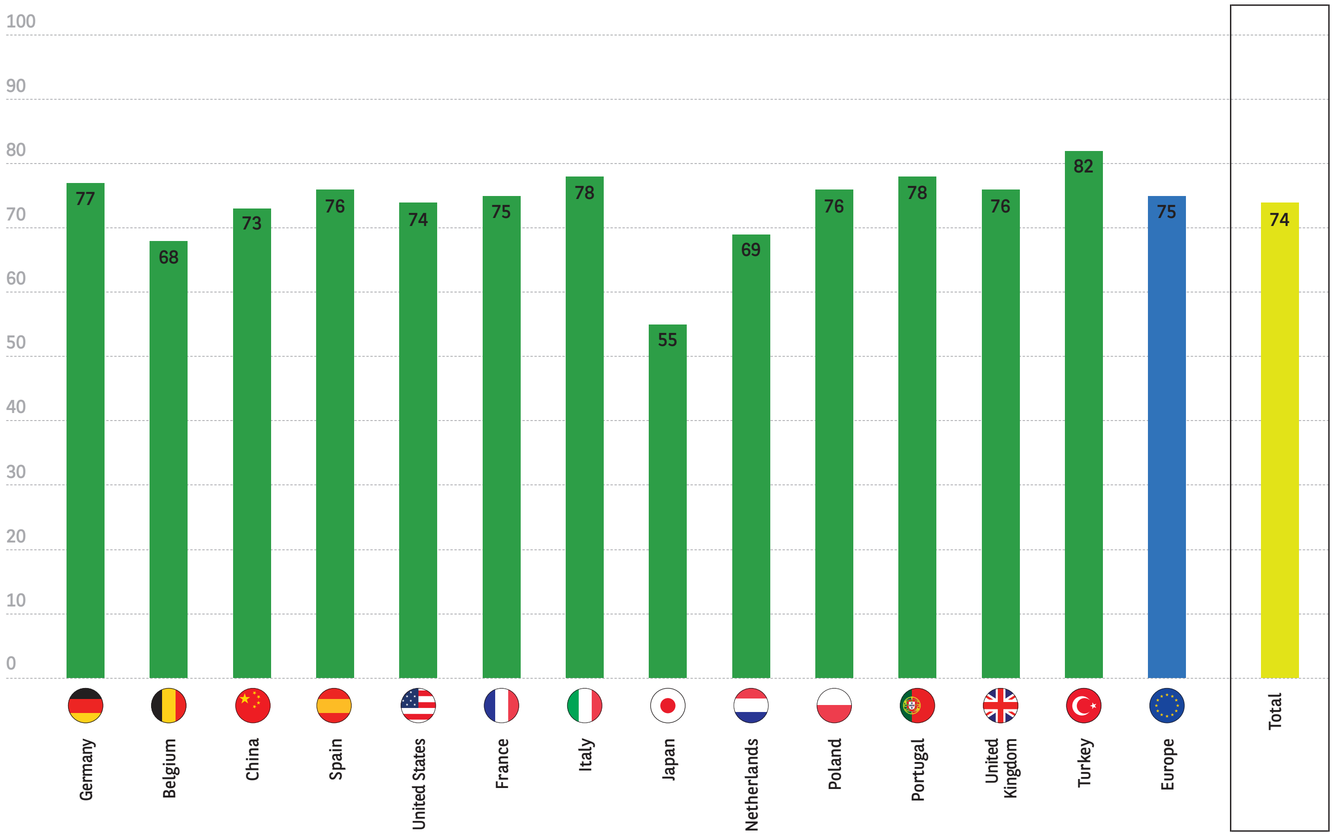
Lowering margins

So how do you bring down car prices to boost the market? In the eyes of three-quarters of motorists, this means lowering manufacturers' margins. **(Fig. 28)**.

Fig. 28

Do you agree or disagree with the following statement? To bring down the price of new cars, manufacturers margins have to be cut, even if this has a negative economic and/or social impact.

(in %) - To all (Strongly agree & Somewhat agree)



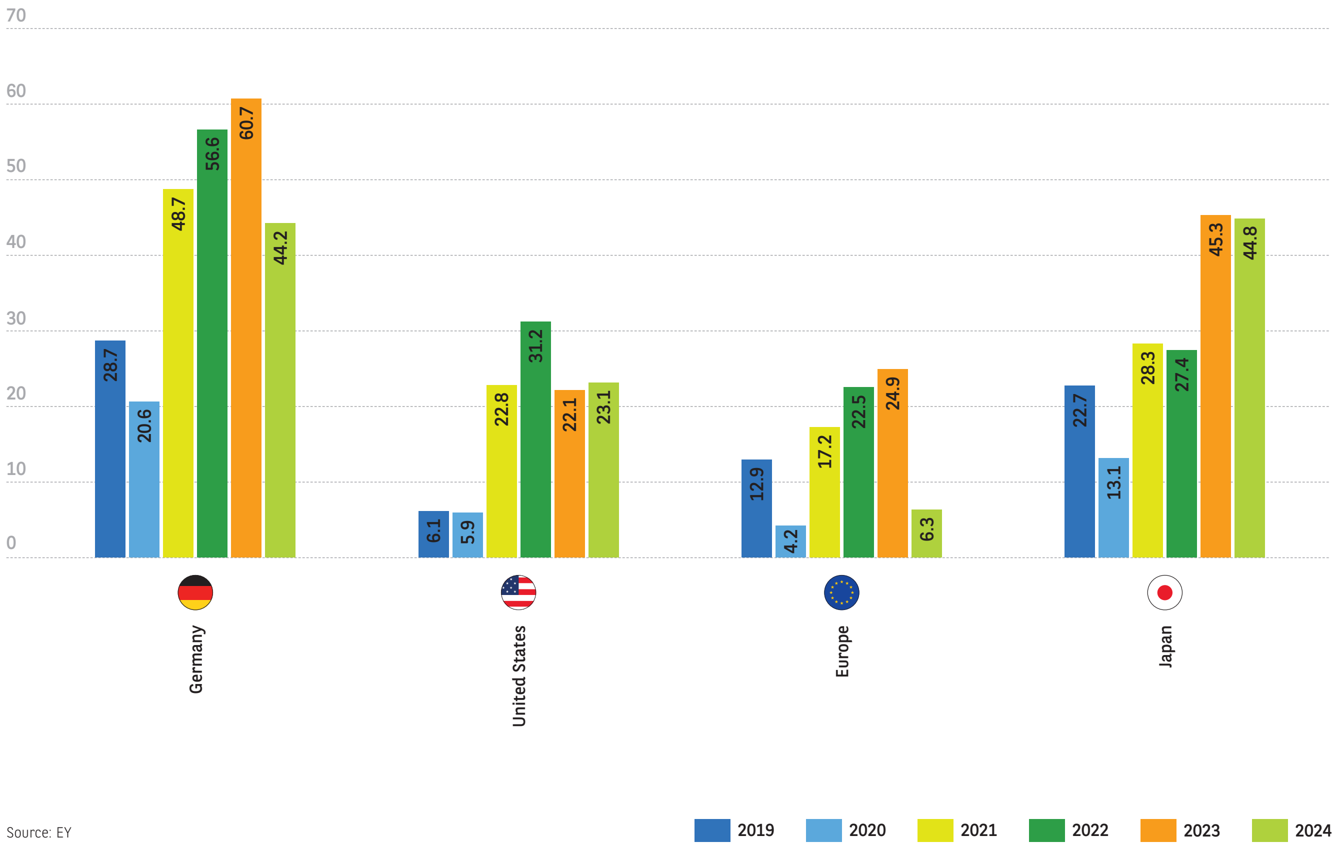
Source: Observatoire CETELEM de l'automobile 2026

This opinion is shared in all countries except Japan (55%).

It's also worth noting that there is no clear-cut position according to income or geographical location.
Only senior citizens are slightly more in agreement than younger people. **(Fig. 29)**.

Fig. 29

EBIT results by car manufacturer.
(in millions of euros, at constant exchange rates)



Source: EY

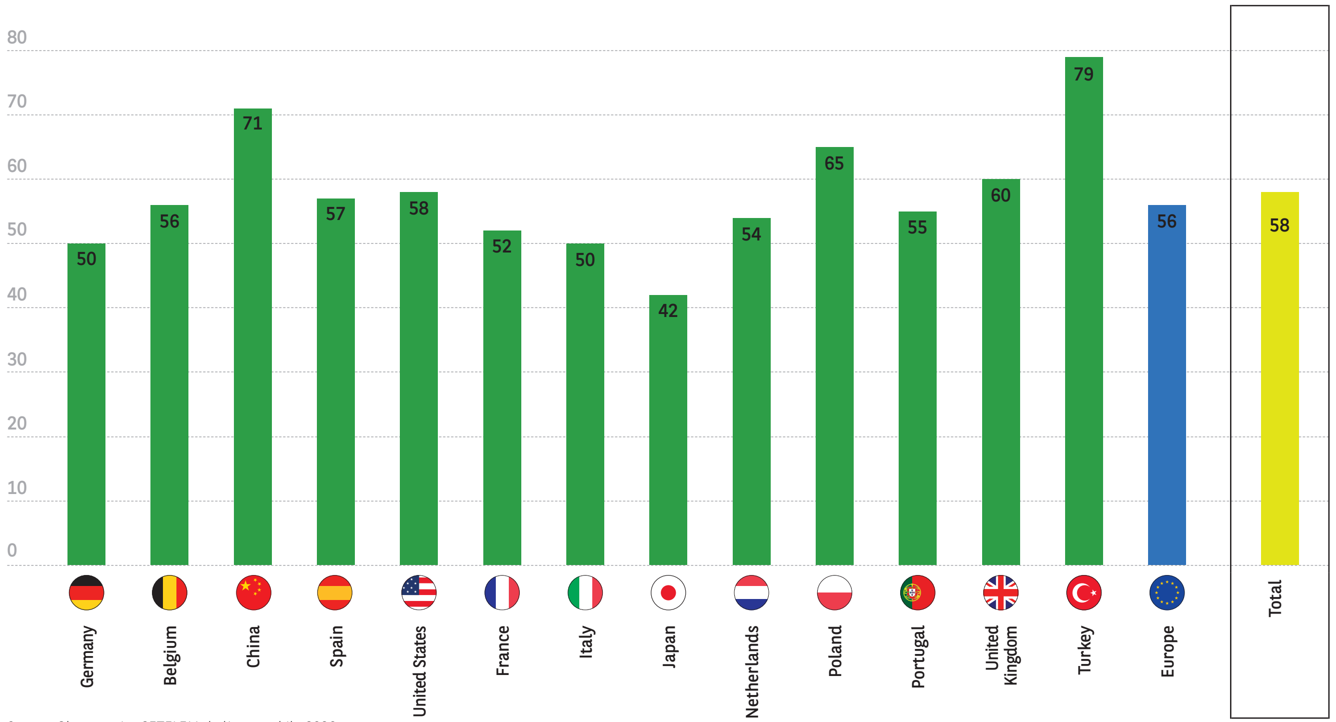
Manufacturing where it's cheaper

Another solution to lowering car prices is to manufacture them in countries where labour is cheaper, even if this has a negative social or environmental impact. 6 out of 10 people support this idea. On this topic, China, Turkey and, to a lesser extent, Poland stand out as being particularly favourable. These are the three countries in this study where labour costs are the most affordable. Japan is the most committed to national production with only 42%, the only score below the average.

With an equal percentage for and against, the Germans, Italians and French were unable to make up their minds. Young people are by far more favourable to the idea than their elders, as are residents of large cities compared with those in rural areas. **(Fig. 30)**.
This measure could have a negative economic impact on Europe's pro-consumer bet.
Producing cheaply elsewhere means job losses, so less income and less purchasing power.

Fig. 30

Do you agree or disagree with the following statement? To bring down the price of new cars, we should give priority to car production in countries where labour and/or manufacturing processes are cheaper, even if this has a negative environmental or social impact.
(in %) - To all (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

2. Public policy

POPULAR INCENTIVES, ACCESSIBLE EVERYWHERE AND FOR EVERYONE

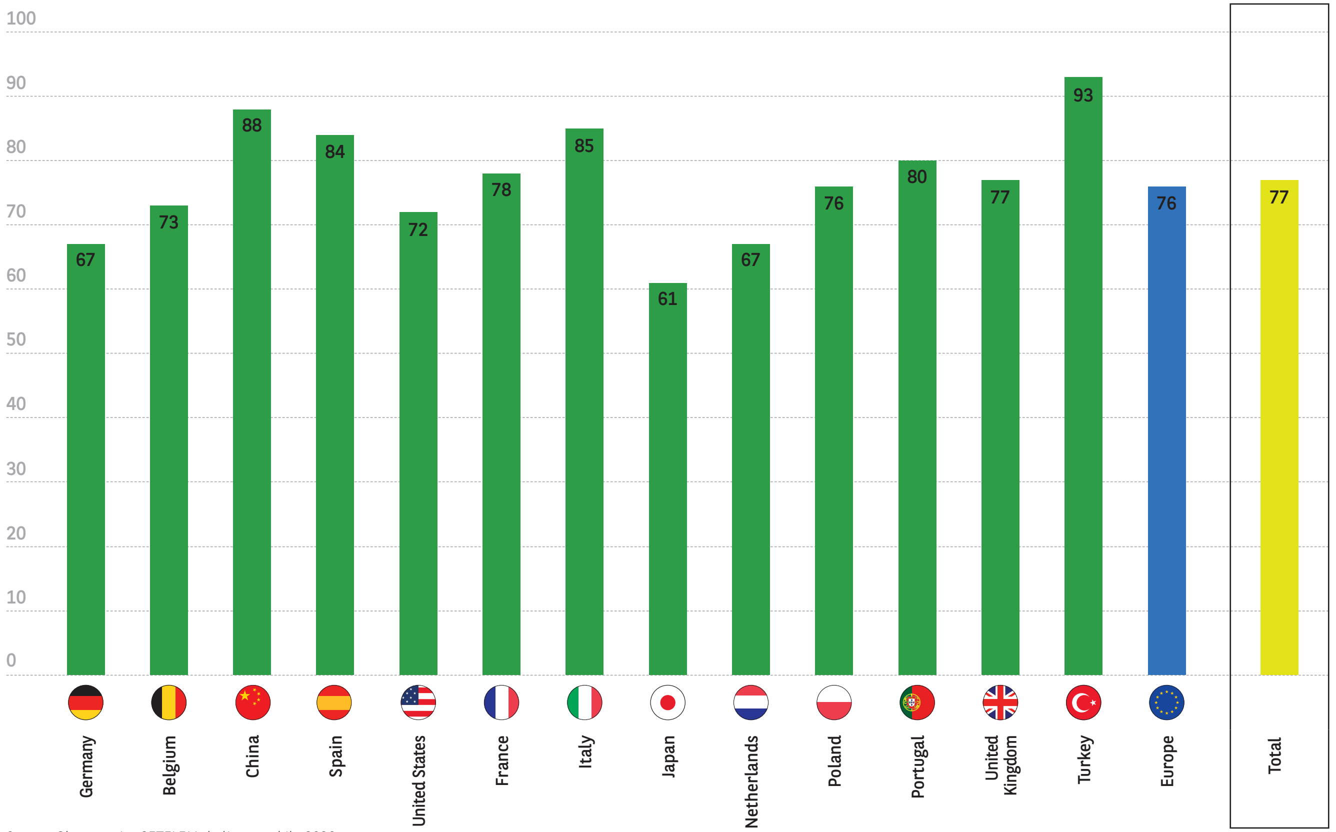
In terms of public policy, the financial issue remains at the heart of our concerns in order to activate a second lever for recovery. In this area, as in others, public policy has a leading role to play. In the previous section, we pointed out the lack of clarity associated with public policies.

However, when it comes to certain issues, which are still linked to the economic dimension, motorists sometimes have very clear ideas. This is the case for purchase incentives, which have been very well received. **(Fig. 31)**. Nearly 8 out of 10 people are in favour. Once again, the Japanese are the most reserved (61%), in contrast to the Turks and Chinese, who are strongly in favour. Mediterranean countries score above the survey average.

Fig. 31

Do you agree or disagree with the following statement? To encourage motorists motorists to buy a a new car, public authorities should offer purchase incentives.

(in %) To all - (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

Controlling prices

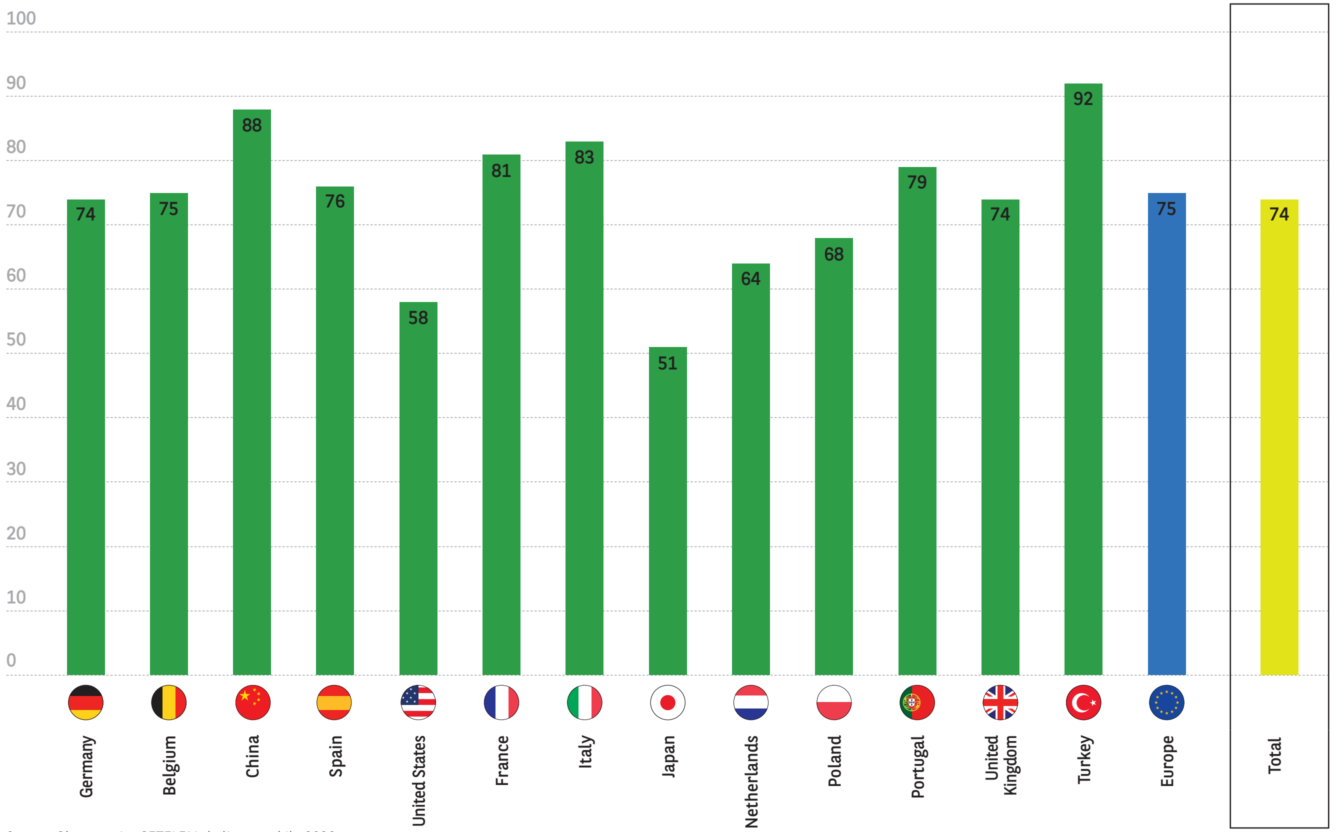
Still on the financial front, the idea of public authorities controlling prices received almost the same number of votes. **(Fig. 33)**. 3 out of 4 people support this measure. The differences between countries are still marked, with more or less the same countries occupying the same positions in the rankings, with the Chinese-Turkish pair ever in the lead, followed by the Italians, with Japan more wary than ever.

The French penchant for a certain form of economic Colbertism is confirmed by a solid 81%.
The 30-49 age group, people living in big cities and families with children believe that controlling prices will make it easier to buy a car.

Fig. 33

Do you agree or disagree with the following statement?
To encourage motorists to buy a new car, public authorities need to control car prices.

(in %) - To all (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

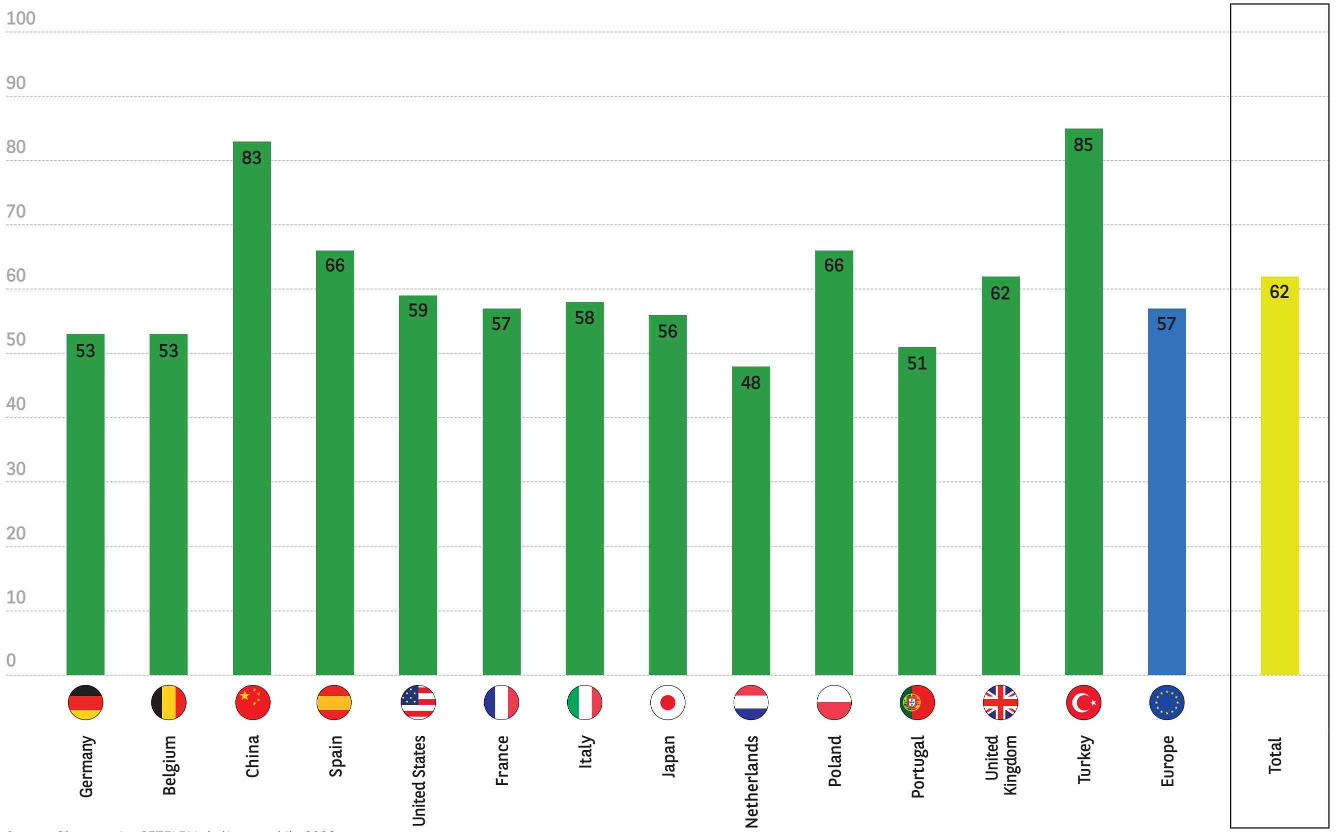
Supporting manufacturers

To a lesser extent, motorists also agree on the financial support that public authorities should give to manufacturers in order to boost the market (62%). This idea is seen as an obvious decision in Turkey and China, where it is already being put into practice, more or less directly. **(Fig. 34)**.

Many European countries, such as the Netherlands and Portugal, are more reserved, with scores of around 50%, even lower than in the United States.

Fig. 34

Do you agree or disagree with the following statement?
To encourage motorists to buy a new car, public authorities need to subsidise manufacturers.
(in %) - To all (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

Revisiting regulatory standards

However, the effectiveness of the 'public policy' lever cannot be based on the economic dimension alone. Faced with a regulatory environment that they consider vague and changeable, and therefore restrictive, just over 7 out of 10 motorists would like public authorities to relax standards and regulations. **(Fig. 35)**.

Fig. 35

Car models marketed in your country must meet certain standards and regulations (safety, emissions).
Are you in favour of or opposed to relaxing certain standards and regulations to make new cars cheaper?
(in %) - To all (Completely in favour & Somewhat in favour)

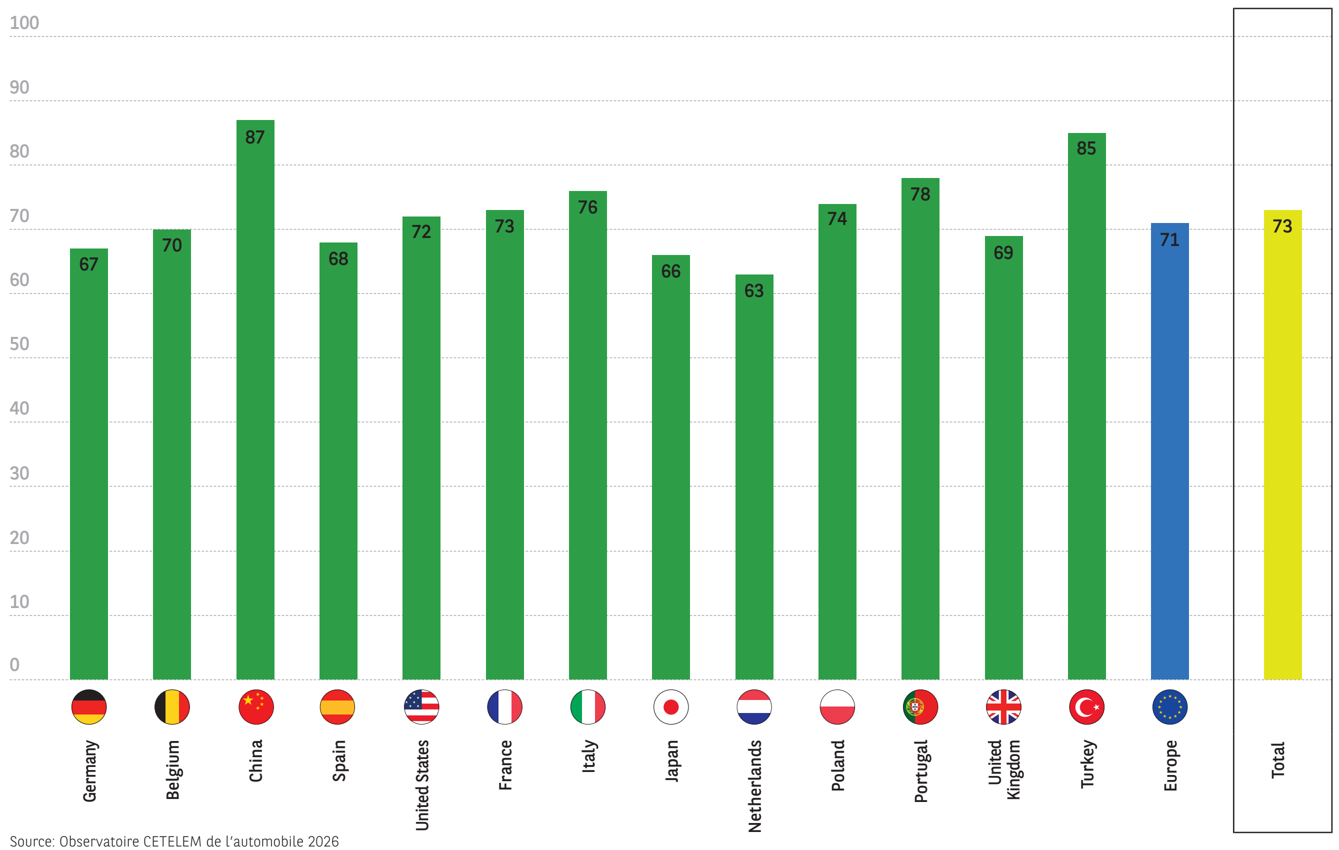
Source: Observatoire CETELEM de l'automobile 2026

This lever is therefore synonymous with greater freedom. Respondents are also in favour of adjusting these standards according to the type of vehicle and road used. Nearly three-quarters of people support both these measures.

Flexibility is less in demand in Japan and the UK, while adaptation measures are less favoured in Japan and the Netherlands. France is in the middle of the pack on both counts. Young people and people living in large cities are the most likely to support these measures.

Fig. 35 bis

Car models marketed in your country must meet certain standards and regulations (safety, emissions).
Are you in favour of or opposed to having different standards and regulations for different car models and types of road to make new cars cheaper?
(in %) - To all (Completely in favour & Somewhat in favour)

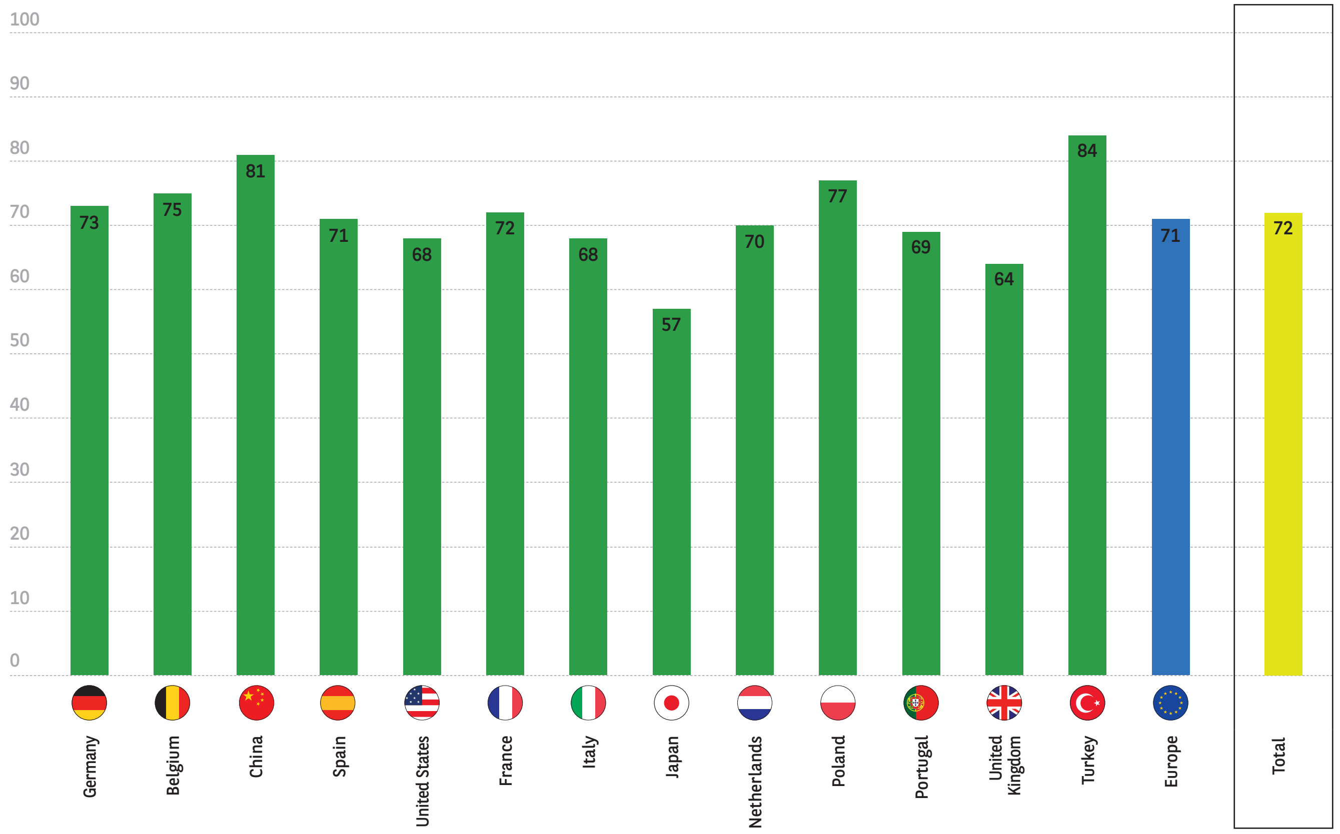


Source: Observatoire CETELEM de l'automobile 2026

Almost as many motorists believe that this step backwards would be effective in reviving the market.
However, opinions are a little more clear-cut from one country to the next, with the same oppositions between the sceptical Japanese and the enthusiastic Chinese and Turks. Once again, the under-50s and people living in big cities show an interest, as do couples with children. **(Fig. 36)**.

Fig. 36

Would you say that relaxing certain standards and regulations would be effective or ineffective in boosting the new car market?
(in %) - To all (Very effective & Fairly effective)

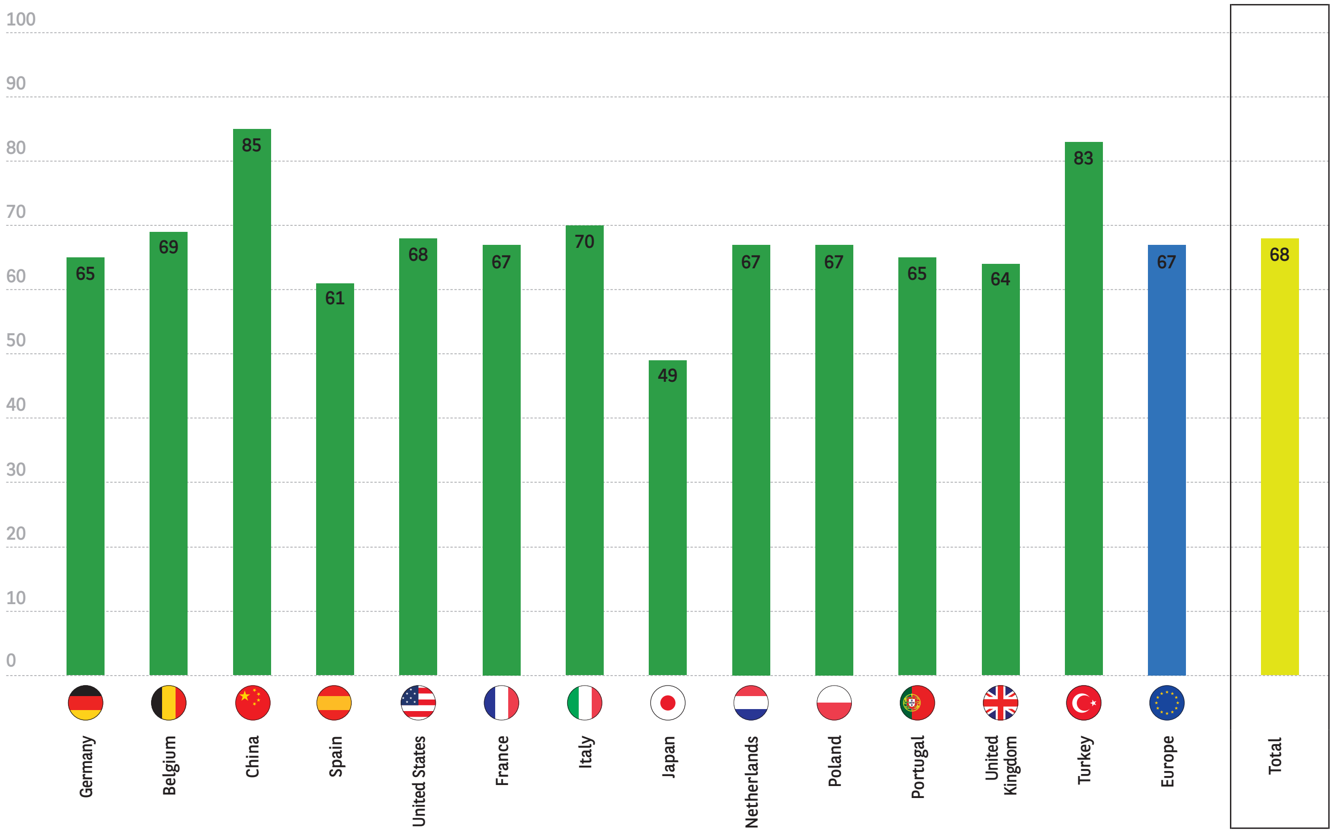


Source: Observatoire CETELEM de l'automobile 2026

Fig. 36 bis

Would you say that adopting different standards and regulations for different car models and types of road would be effective or ineffective in boosting the new car market?

(in %) - To all (Very effective & Fairly effective)



Source: Observatoire CETELEM de l'automobile 2026

3. Design

A STRONG SENSE OF AESTHETICS

We have already highlighted the excellent image cars have among those who drive them. This opinion should be taken at face value if we are to believe the positive assessment motorists make of their design. This factor is the third lever in the recovery of the automotive industry.

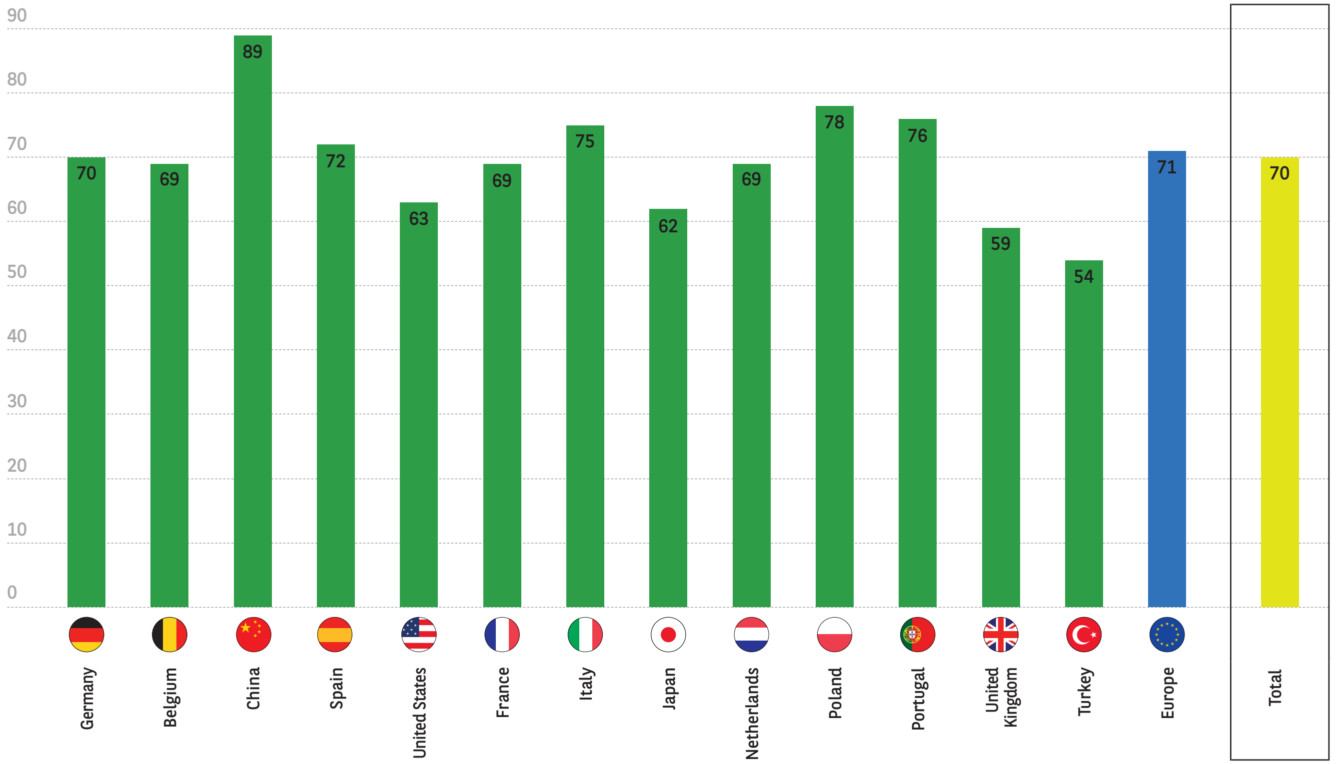
7 out of 10 people say they are very interested in the design of their car. **(Fig. 38)**.

This is particularly true in China, where an ostentatious side has persisted more than in other countries in recent years, even if the days of parading down the avenues of major Chinese cities in testosterone-fuelled racing cars seem (quite rightly) to be over. However, this is also the case in Italy, Poland and Portugal. For once, the Turks are at the very bottom of the rankings, their low opinion of 54% reflecting a more pragmatic than aesthetic approach to the car. Conversely, younger generations and those on higher incomes claim to be the most receptive to an attractive design.

Fig. 38

To what extent do you agree with the following statement? I'm very attentive very attentive to the aesthetics and design of my car.

(in %) To those who have at least one car in their household. (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

Design appeals, yes, but...

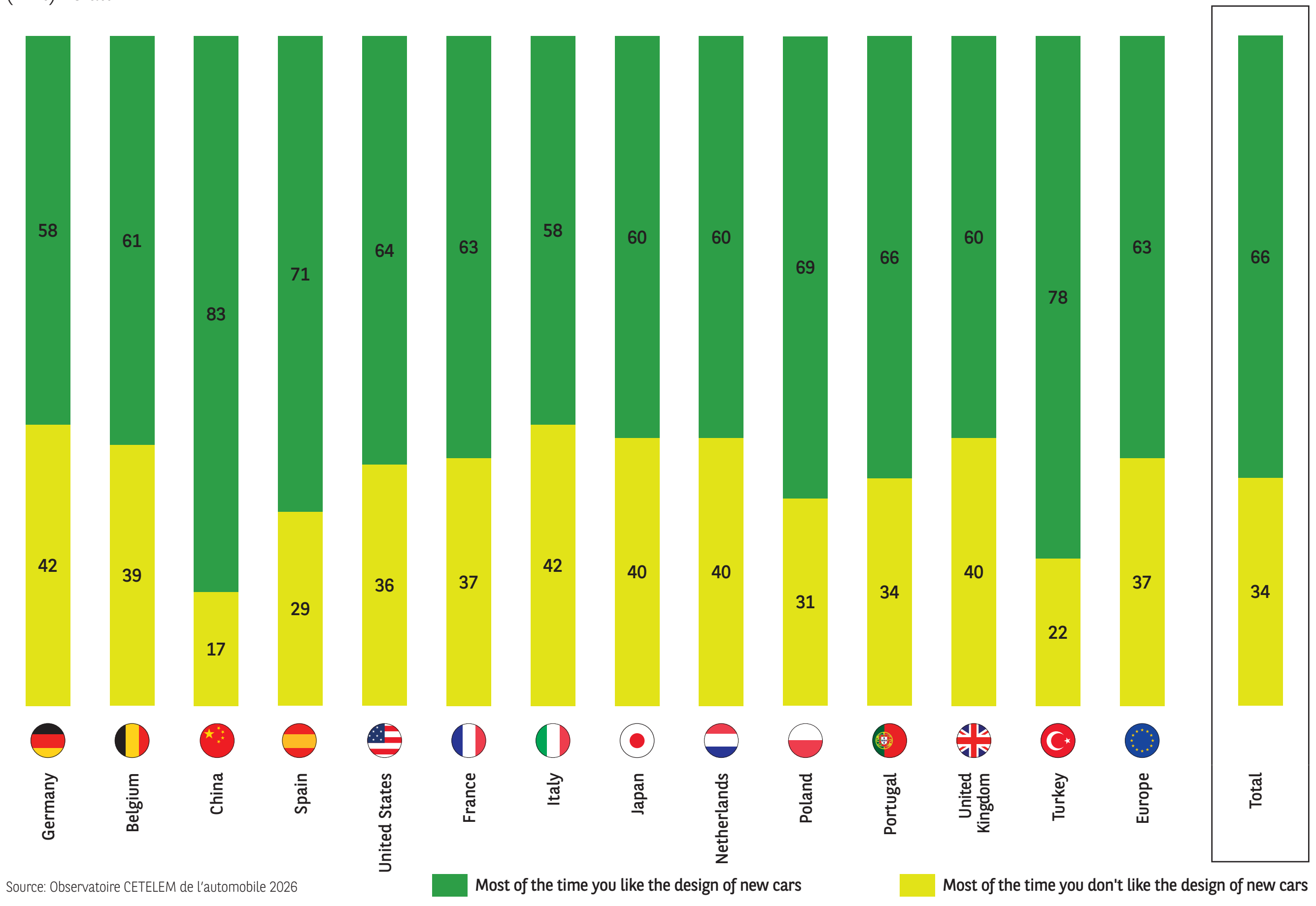
Manufacturers seem to have come up with a response to this interest in aesthetics that satisfies motorists.
(Fig. 39).
Two-thirds of them are attracted by the design of today's new cars and believe that they offer a variety of designs. In China and Turkey, the enthusiasm is unmistakable.

You have to look to Western Europe to find people who are less convinced. With the exception of Spain and Poland, around 4 out of 10 European motorists are not won over by current vehicles and criticise their lack of stylistic diversity. There is therefore considerable scope for development to meet expectations by activating the lever linked to style.

Fig. 39

Which statement comes closest to your opinion?

(in %) To all



Source: Observatoire CETELEM de l'automobile 2026

Looks matter

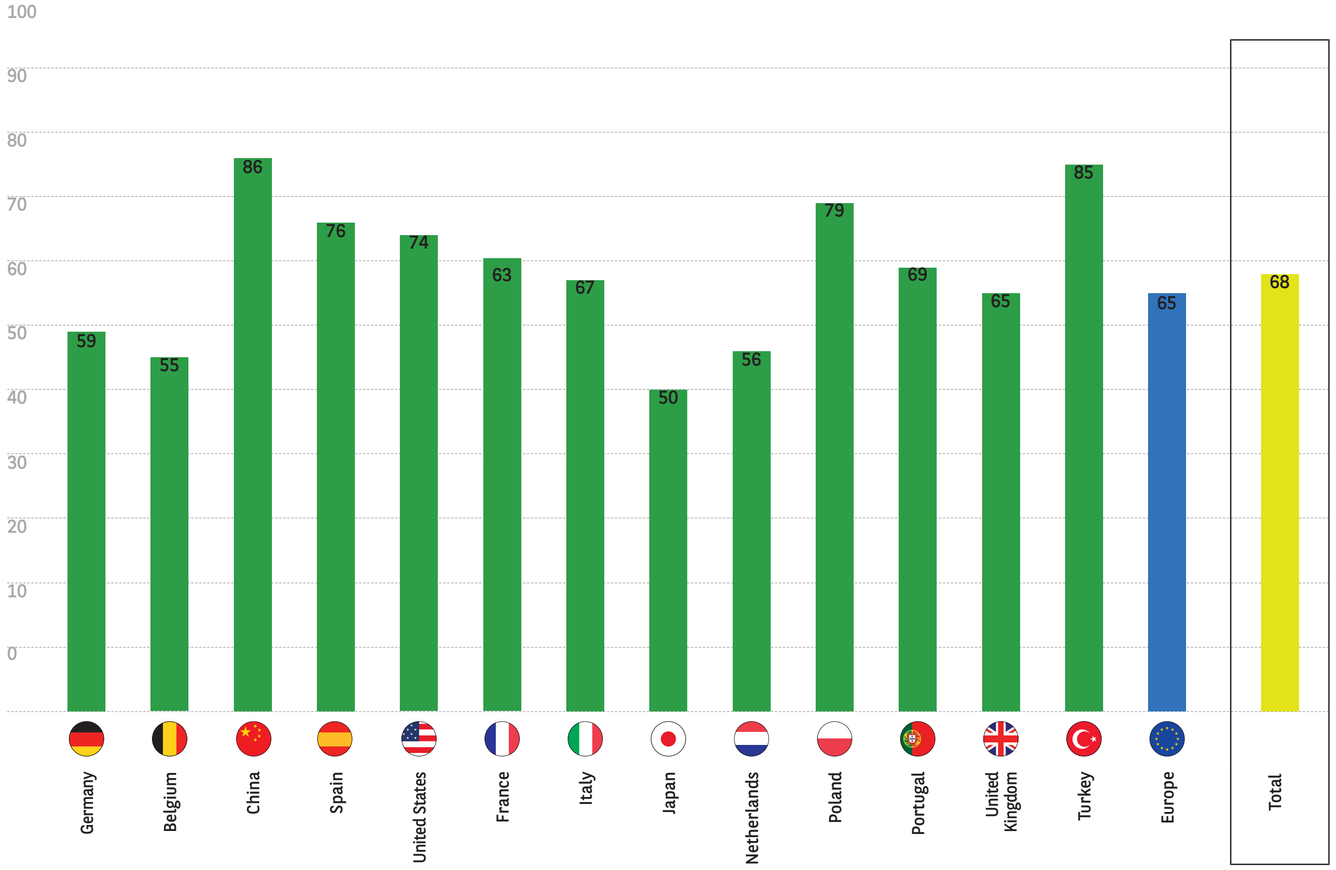
There's another factor that reinforces this ever-greater attention to design, the first tangible argument that a vehicle conveys to its potential owner.

A further sign of its importance is that almost 7 out of 10 people say they are attracted by the look of a car they see in the street. In China, Turkey, Poland and Spain, this attraction is particularly strong. **(Fig. 40)**.

Fig. 40

To what extent do you agree with the following statement? I sometimes want to own a car I see in the street.

(in %) To those who have at least one car in their household. (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

An interest in lasting style and novelty

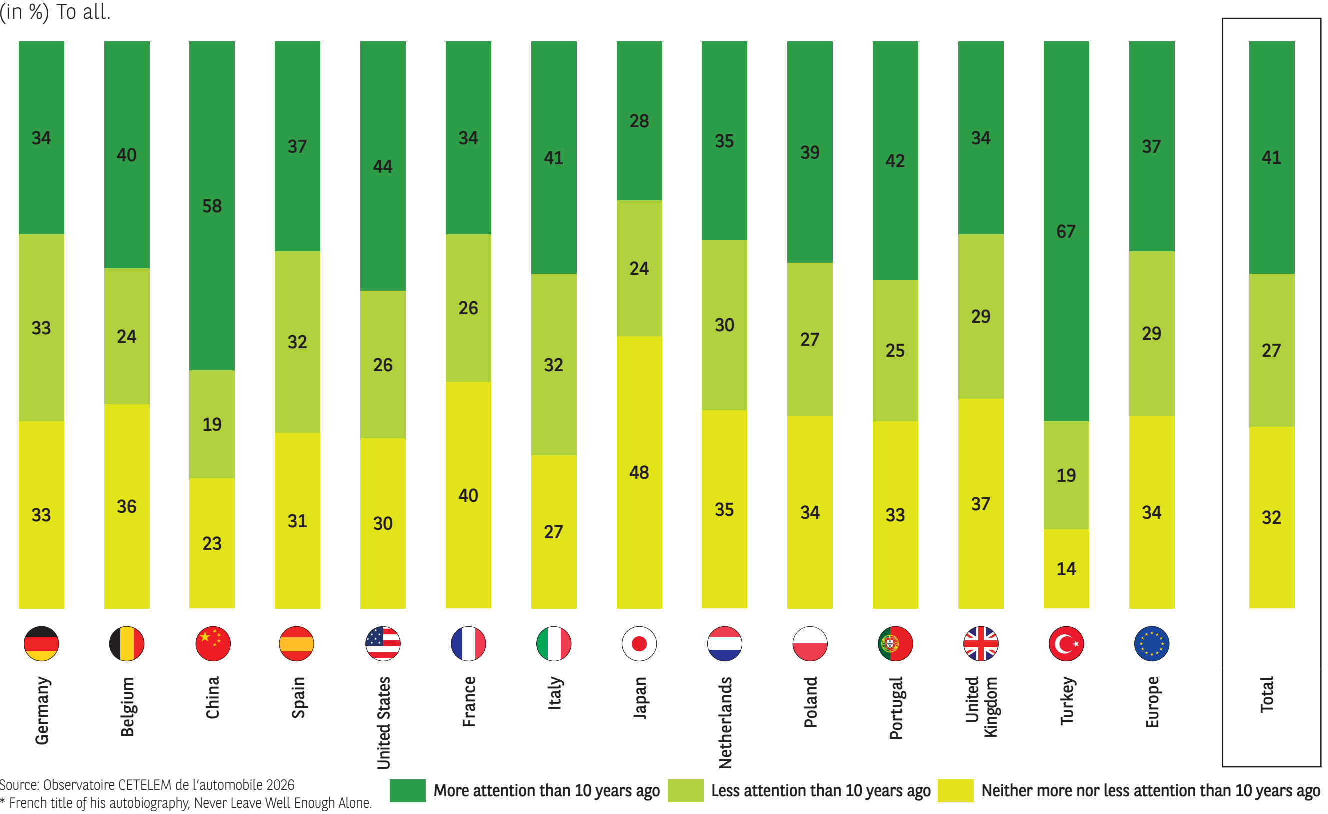
Generally speaking, beyond a single envious glance in the street, there is still a keen interest in new models. Just under 3 in 10 motorists say they are less interested in new models than they were 10 years ago. **(Fig. 41)**.
In this respect, we find the same geographical divides. Turkey and China are still leading the way in being attracted to new models. Less attention is paid to new models in European countries such as Germany, Italy and Spain.

France stands out for its relatively stable attention over this period (40%). The above-average interest in new models is still very much the preserve of young people, high-income earners and people living in large cities. According to Raymond Loewy, one of the world's greatest designers, who created not only soup cans and cigarette packets, but also cars, 'Ugliness does not sell'.* The opinions expressed by respondents in this study certainly prove him right, showing that the automotive sector's ability to bounce back depends on more attention being paid to design.

Fig. 41

Would you say that you pay more attention, less attention, or neither more nor less attention than you did 10 years ago to the new models of car coming onto the market?

(in %) To all.



Source: Observatoire CETELEM de l'automobile 2026
* French title of his autobiography, Never Leave Well Enough Alone.

4. The Offering

Keeping it simple…

Once again with a view to lowering prices, which is the main lever for recovery, taking a fresh look at the supply side of the market would seem to be the right way to revive the market, according to motorists. **(Fig. 42)**.

Firstly, a third of respondents encourage the production and therefore the sale of vehicles with fewer customisation options. Supporters of this frugality are concentrated in three southern European countries: Portugal, France and Italy (40%, 38% and 36%). In the north of Europe, Germany and Poland are more resistant.

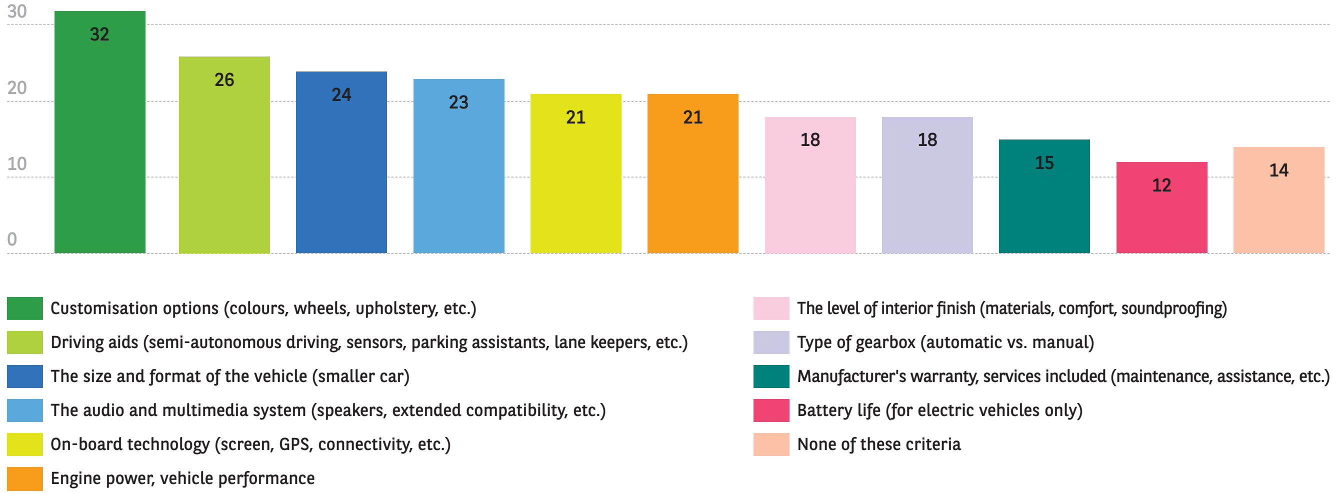
There should be simplicity in terms of choice, but also when it comes to technology. The idea of reducing driving aids to cut costs comes second in this ranking (26%). Somewhat surprisingly, the technophile Chinese and Americans are the most likely to want this.

Finally, the production of smaller, lighter vehicles takes third place. This is good news for supporters of more environmentally-friendly vehicles. Behind the Netherlands, Germany, the country of large saloon cars and SUVs, occupies a surprising second place, with a significant number of motorists prepared to downsize.

Fig. 42

In order to benefit from a lower price on the purchase of a new car, in what types of criteria would you be most prepared to have a lower level of service? Select up to three answers.

in % (Total countries) - To all



Source: Observatoire CETELEM de l'automobile 2026

... and doing less

'Less is more', said the modernists. Today's motorists approve. **(Fig. 43)**.

Three-quarters are in favour of fewer models being built. In most countries, opinions on this subject are relatively similar, except in Japan where there is less interest in reducing the offering.
The French lead the way on this point, ahead of the British.

Fig. 43

Do you agree or disagree with the following statement: in order to bring down the price of new cars, manufacturers need to offer fewer different models, even if this means that buyers have less choice.
(in %) - To all (Strongly agree & Somewhat agree)

Source: Observatoire CETELEM de l'automobile 2026

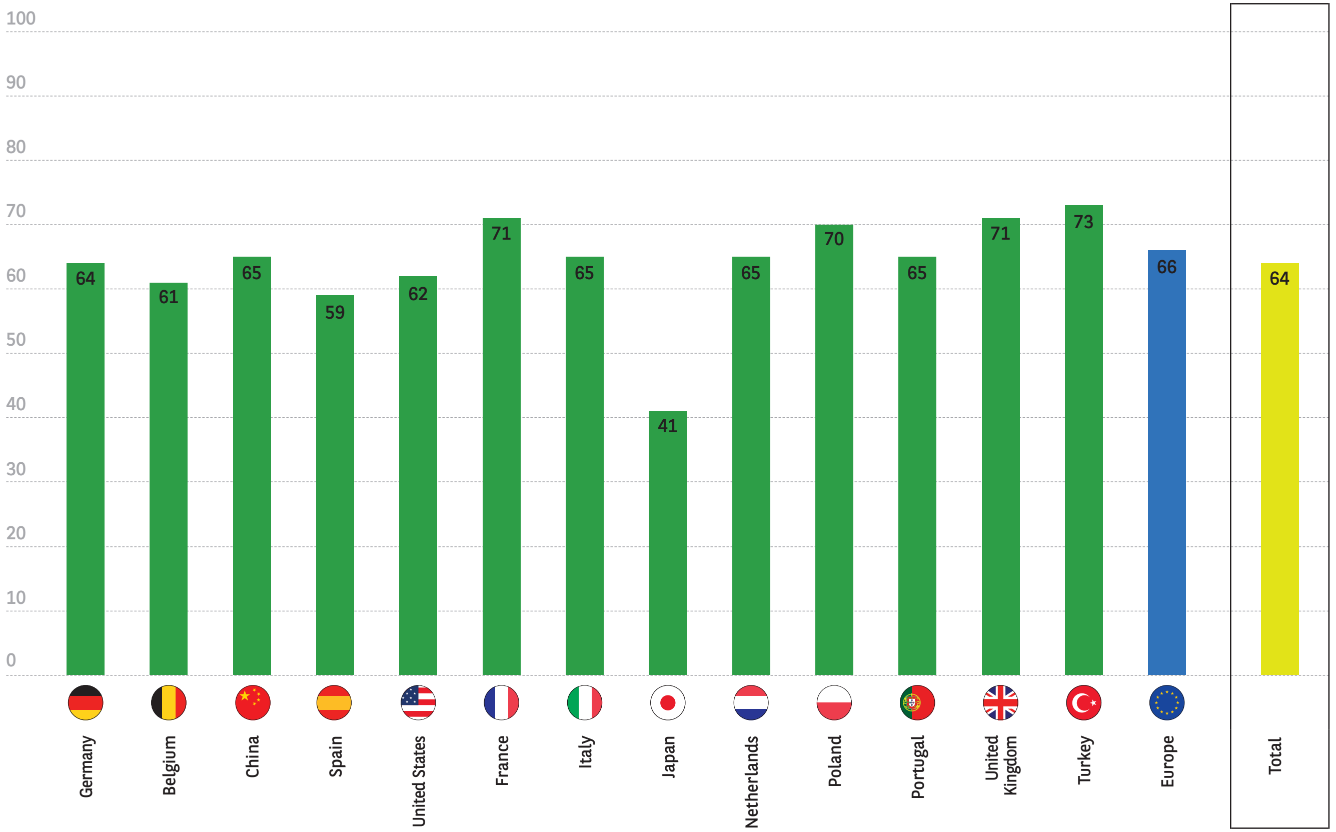
Promoting used and reconditioned cars

Lastly, two-thirds of respondents felt that the range of cars on offer could benefit from a shift towards used and reconditioned vehicles. **(Fig. 44)**.

Here again, Japan is not in favour, the only country where only a small minority supports the idea.
Naturally, young people are in favour of reconditioning, an idea that's in keeping with the times.

Fig. 44

Do you agree or disagree with the following statement? The sale of used or reconditioned cars should be prioritised over the sale of new cars, even if this has a negative economic and/or social impact.
(in %) - To all (Strongly agree & Somewhat agree)



Source: Observatoire CETELEM de l'automobile 2026

5. Retail

Appreciation for dealers…

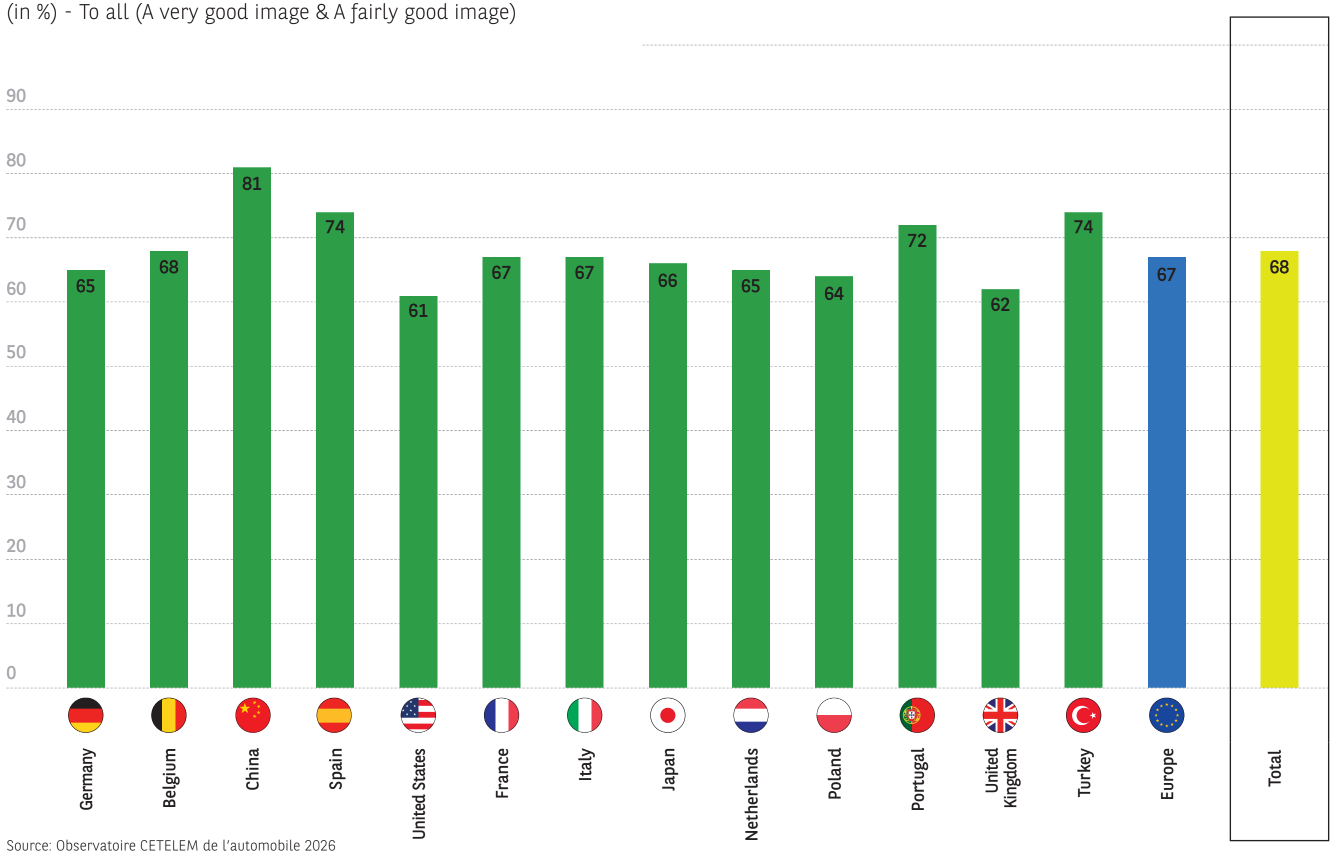
This may seem like a tautology, but this new study by L'Observatoire Cetelem shows that if car sales are to be revived, those who sell them have an eminent role to play. To achieve this, they can rely on their positive image, as can manufacturers.

Car dealers are appreciated in all countries, in relatively equal measure, by 7 out of 10 people on average, with a high point as always in China, and to a lesser degree in Spain and Turkey. Respondents' social and geographical origin, as well as their age, did not bring out any significant differences. **(Fig. 45)**.

Fig. 45

Overall, would you say that you have a good or bad image of car dealerships?

(in %) - To all (A very good image & A fairly good image)



Source: Observatoire CETELEM de l'automobile 2026

… and salespeople

Within these dealerships, the sales staff themselves have earned a considerable amount of goodwill, which puts them in a favourable position with motorists. **(Fig. 46)**.

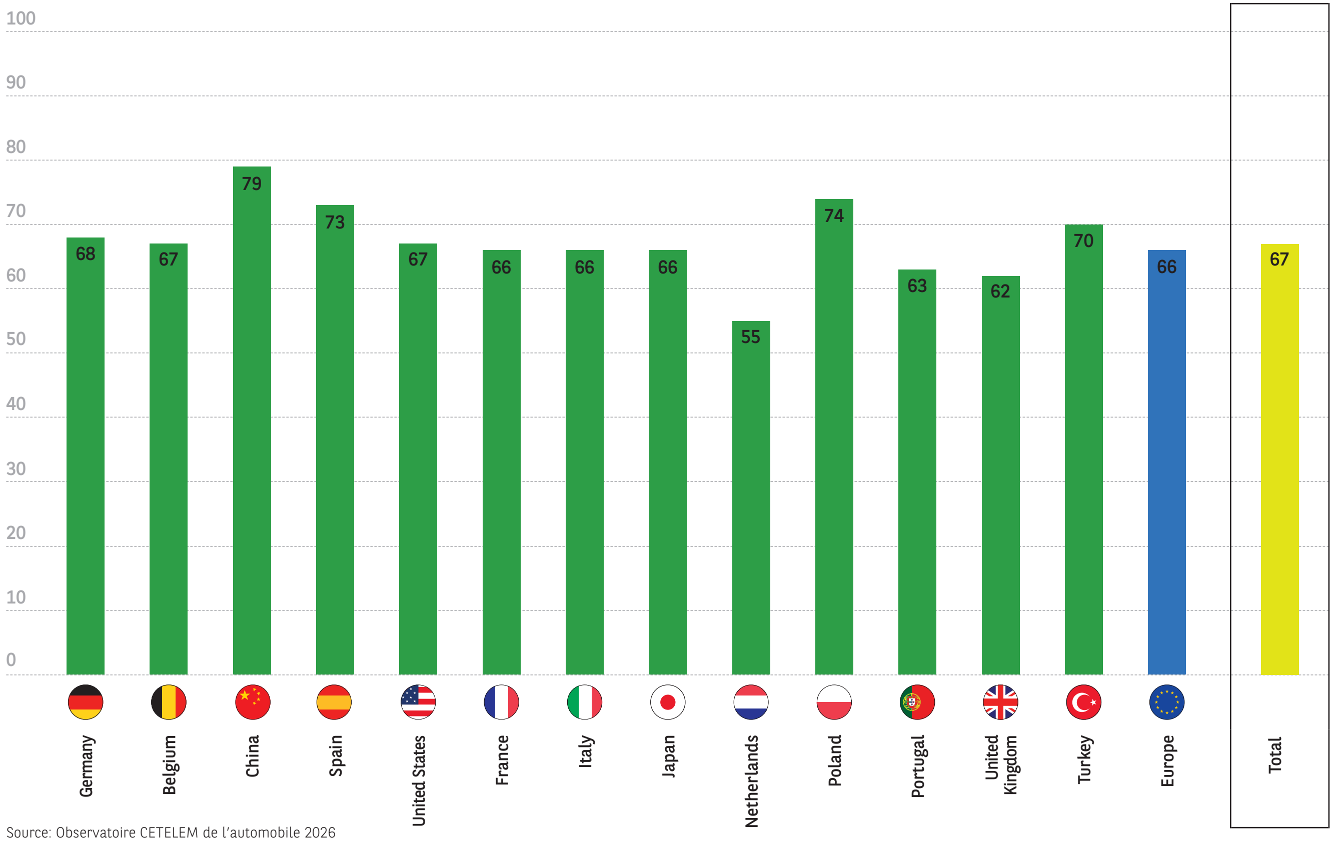
Two-thirds have a good image of salespeople, particularly the Chinese, Poles and Spanish.

Only the Dutch are cautious, with just 55% expressing a positive opinion. If we look at certain sociological segments, the differences are more marked. Young people appreciate them much more than their elders, as do people living in large cities compared to those in rural areas.

Fig. 46

Overall, would you say that you have a good or bad image of car dealers (the actual person)?.

(in %) - To all (A very good image & A fairly good image)



Source: Observatoire CETELEM de l'automobile 2026

Trust throughout the purchasing process

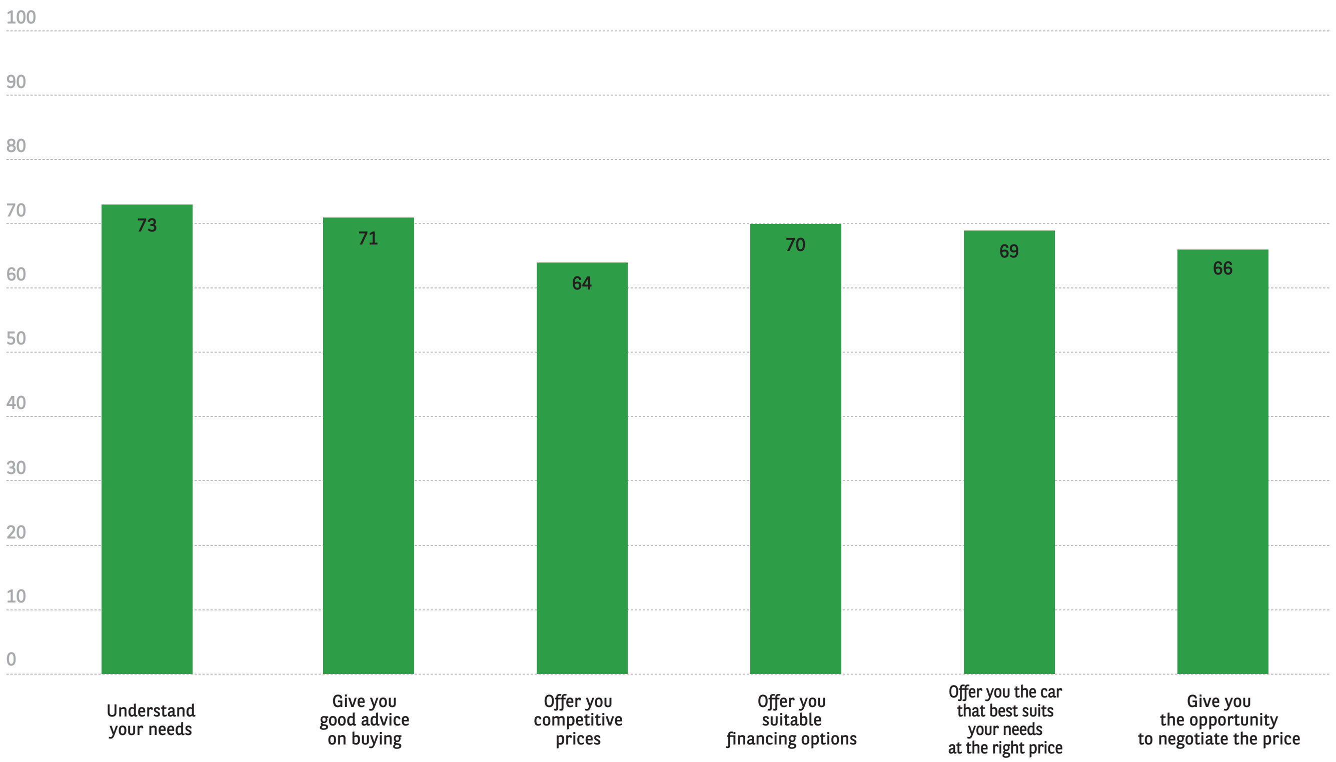
This positive image is reflected in the overall trust placed in dealers and their sales staff to support motorists throughout the purchasing process. 7 times out of 10, motorists trust them, first and foremost, to understand their needs, which in turn leads to the right advice to help them make the right purchase.

These are useful assets when it comes to developing the offering and making the economic adjustments that motorists are looking for to meet their expectations. Let's repeat this one last time: the Turks and the Chinese are the most satisfied. The Americans and the British are less so. **(Fig. 47)**.

Fig. 47

If you were buying a car, would you trust the dealer to...?

in % (Total countries) - To all (Total trust & A fair amount of trust)



Source: Observatoire CETELEM de l'automobile 2026

Distribution penalised by public policies, especially in Europe

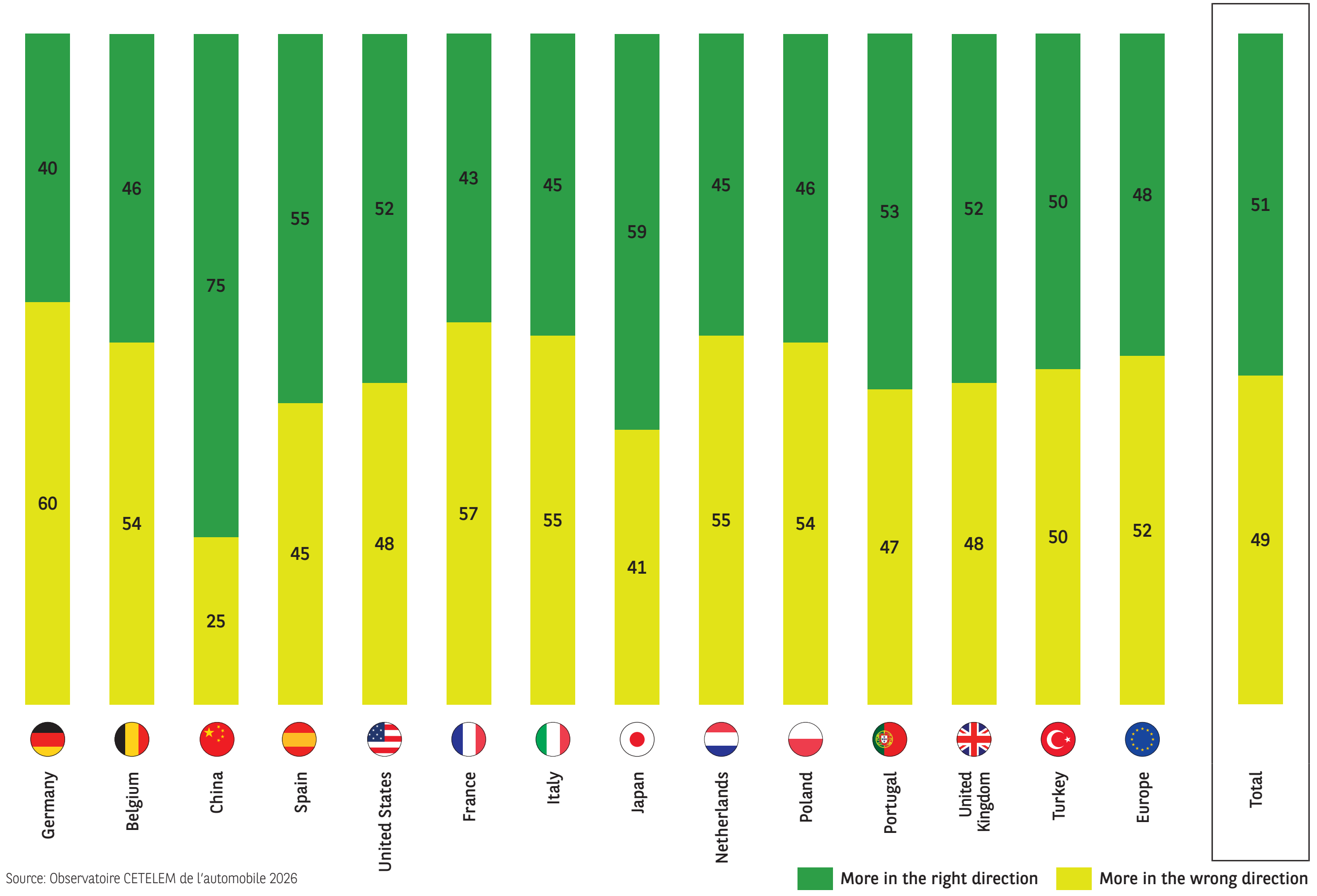
However, if distribution is to play an effective role in reviving the industry, public policies must be better directed towards dealers.
(Fig. 48).

1 in 2 people think this is currently the case. In Europe, this score is above average in only three countries. It is at its lowest in Germany and France, which express the strongest doubts about the direction taken by public policies intended to support car dealers.

Fig. 48

Would you say that public policy today is moving in the right direction or the wrong direction when it comes to car dealerships?

(in %) To all.



Source: Observatoire CETELEM de l'automobile 2026

Using the internet to sell cars

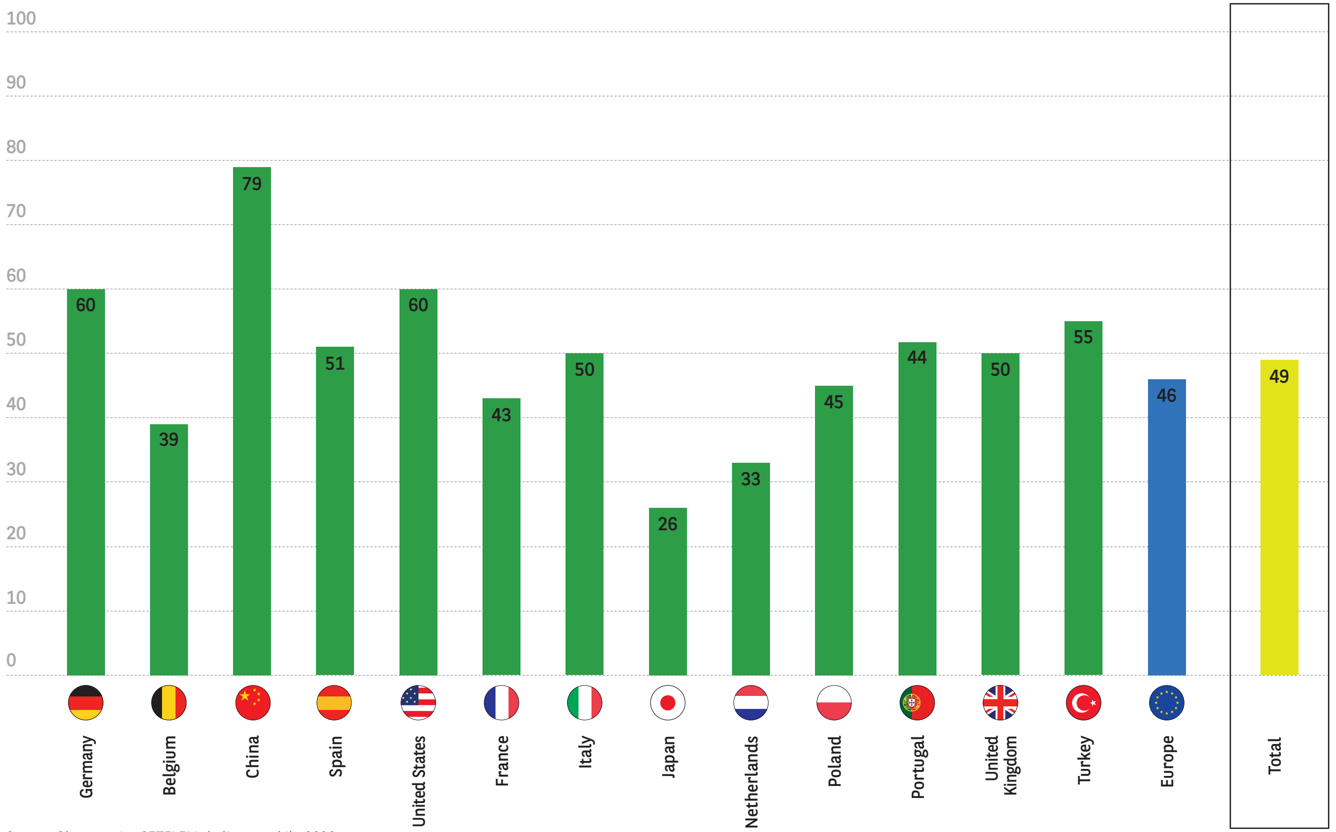
Activating the retail lever also means potentially opening it up to digital channels. Potentially, because opinions are divided. On average, 1 in 2 motorists say they would be able to complete their entire buying journey on the internet. **(Fig. 49)**. However, when it comes to this issue, opinions diverge significantly between countries, with the greatest differences recorded.

In China, where digital technology is an integral part of daily life and is already being applied to car purchases, 79% of people are in favour of a buying journey entirely conducted online. The Germans, Americans and Turks are also in favour. Conversely, in many countries, less than half of respondents approve, particularly in Japan and the Netherlands (26% and 33%). Unsurprisingly, young people and people living in large cities are in favour, as are families with children and high-income earners.

Fig. 49

Could you buy a new car entirely on the internet (from information gathering to payment and delivery of the vehicle)?

(in %) - To all (Yes, definitely & Yes, probably)



Source: Observatoire CETELEM de l'automobile 2026

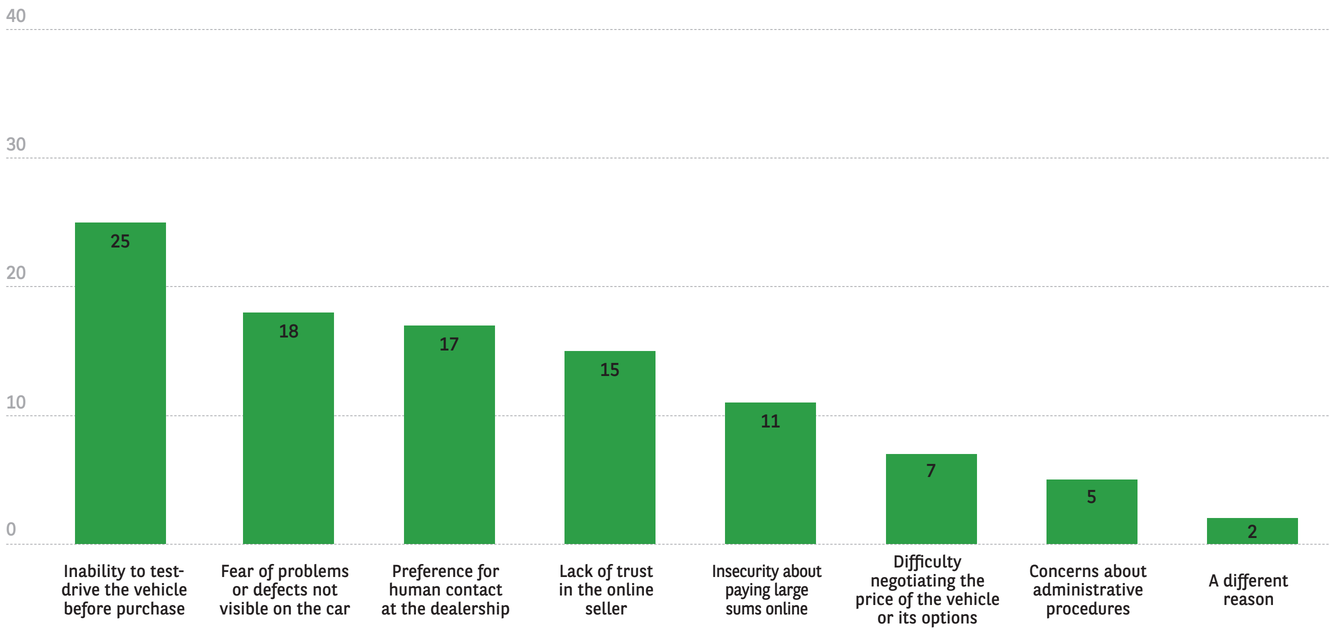
Favouring physical contact

This reluctance can be explained by the virtual nature of this approach, and therefore the absence of a human dimension. Not being able to see the vehicle, not being able to identify a fault in person and the preference for human contact are the main obstacles to switching to digital purchasing. Seniors are particularly sensitive to the absence of this human dimension. **(Fig. 50)**.

Fig. 50

What's the main reason for this?

in % (Total countries) - First - To those who feel they could not buy a new car entirely on the internet.



Source: Observatoire CETELEM de l'automobile 2026

THE FIVE KEY DATA

Price

1 in 2 people
think it is a priority to lower vehicle prices to revive the market

Three quarters
think that manufacturers' margins should be reduced

Public policy

6 out of 10 people
are in favour of production where labour costs are lower

8 out of 10 people
are in favour of purchase incentives

3 out of 4 people
support price controls

6 out of 10 people
are in favour of support for manufacturers

7 out of 10 people
would like to see regulations and standards relaxed

Design

7 out of 10 people
are very interested in design

Two-thirds
of motorists like the design of new cars

3 out of 10 people
show less interest in new models than ten years ago

A revamped offering

A third
of respondents would like fewer personalisation options

A quarter
are in favour of fewer driving aids and cars that are lighter and smaller

Three quarters
are in favour of fewer models to bring prices down

Retail

7 out of 10 people
have a good image of dealers and salespeople

7 out of 10 people
think they understand their needs and give them good advice

1 in 2 people
believe that public policies towards car dealers are well directed

1 in 2 people
could buy a vehicle entirely on the internet

CONCLUSION

What if the automotive sector needed to believe in itself more?

That's what you might be tempted to believe upon reading this new study. The industry is in crisis, no one can deny it, but bouncing back is possible if the right levers are activated. These levers are within the reach of the main market players and their 'partners', the most important of which are public authorities.

We have identified five main levers: price, public policy, design, offering and retail. These are probably not the only possibilities. However, the effectiveness of their activation can be backed up by the continuing appeal of the car.

This study also highlights a crucial factor for believing in the industry's ability to bounce back.
Generally speaking, these levers will be more effective with young people and people living in large cities, contrary to the generally accepted idea that these target groups no longer believe in cars. Above all, these are potential customers who need to be won over if the outlook for the automotive sector is to be brighter.

ANNEX

Further results Germany

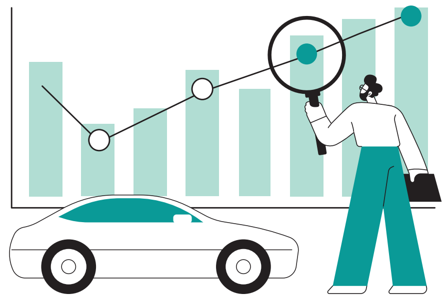


Fig. 8

Overall, would you say that you have a good or bad image of...? **New cars** In %	A very good image & A fairly good image	89
Overall, would you say that you have a good or bad image of...? **Used cars** In %	A very good image & A fairly good image	83

Fig. 14

Do you plan to buy a car in the next 5 years? In % (Yes, definitely & Yes, probably)	New car	54
	Used car	51

Fig. 15

Would you say that it is now easy or difficult to sell a car at a good price? In % (Very easy & Fairly easy)	Bought new	59
	Bought second-hand	53

Fig. 17

In your opinion, which player should take a priority role in revitalising the new car market? In %	Automakers	37
	The goverment	21
	Distributors (dealership, etc.)	12
	Motorists	9
	Banks and credit institutions	6
	The media	6
	Local authorities	5
	Internet / social networks	4

Fig. 42

In order to benefit from a lower price on the purchase of a new car, in what types of criteria would you be most prepared to have a lower level of service? Select up to three answers.

In %

The size and format of the vehicle (smaller car)	31
Customisation options (colours, wheels, upholstery, etc.)	27
On-board technology (screen, GPS, connectivity, etc.)	26
Driving aids (semi-autonomous driving, sensors, parking assistants, lane keepers, etc.)	26
The audio and multimedia system (speakers, extended compatibility, etc.)	25
Engine power, vehicle performance	23
The level of interior finish (materials, comfort, soundproofing)	20
Type of gearbox (automatic vs. manual)	19
Manufacturer's warranty, services included (maintenance, assistance, etc.)	14
Battery life (for electric vehicles only)	12
None of these criteria	11

Fig. 47

If you were buying a car, would you trust the dealer to...?

In % (Total trust & A fair amount of trust)

Understand your needs	70
Give you good advice on buying	65
Offer you competitive prices	63
Offer you suitable financing options	69
Offer you the car that best suits your needs at the right price	63
Give you the opportunity to negotiate the price	68

Fig. 50

What's the main reason for this?

In % (Named first – To those who feel they could not buy a new car entirely on the internet.)

Inability to testdrive the vehicle before purchase	28
Fear of problems or defects not visible on the car	23
Lack of trust in the online seller	21
Preference for human contact at the dealership	10
Difficulty negotiating the price of the vehicle or its options	8
Concerns about administrative procedures	5
Insecurity about paying large sums online	3
A different reason	2

METHODOLOGY

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

Surveys were conducted **online** and simultaneously by **Harris Interactive** in **13 countries** (9 in Europe, as well as Turkey, Japan, China and the United States), with 13 representative samples of the national population of each country, aged 18 and over, interviewed from **30 June to 11 July 2025**.

A total of **15,774** people were surveyed across the various countries. Representativeness is guaranteed by quota sampling and an adjustment applied to the following variables: gender, age, region of residence and the level of income (or socio-professional category in France) of those questioned in each of the countries. Each country was then given its weight in the overall sample, according to the size of its total population.

3,144 interviews were conducted in France and more than 1,000 in each of the other countries.

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Design: © Altavia Disko
Illustrations: Altavia Disko, Adobe Stock

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