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PRESS RELEASE

L'OBSERVATOIRE CETELEM DE L'AUTOMOBILE 2022

An international survey conducted in 17 countries on a sample of 11,000 people

*45% of registrations worldwide and a bright future, despite somewhat mixed perceptions:
the bold trajectory of the SUV*

Despite being criticised for its environmental impact, the SUV remains a global success story. This is a phenomenon that defies all economic and ecological logic, but which is set to continue nonetheless.

The SUV: a divisive category of vehicle

SUVs are perceived differently depending on whether or not one owns such a vehicle, not least when it comes to their environmental impact. 33% of those surveyed around the world believe that SUVs pollute more than other types of vehicle. Overall, 23% of SUV owners are of this opinion, while the figure for non-owners is 36%. The idea that SUVs might be bad for the environment seems to be of little importance to motorists.

Non-SUV owners are more likely to criticise the showiness of those who drive an SUV. In the view of 43% of respondents, acquiring such a vehicle is about following a trend, while 34% consider that those who do so are quite keen to stand out from the crowd. The idea of restricting sales of SUVs also gives these two categories of motorist pause for thought: 30% of SUV owners are in favour, compared with 41% of non-owners.

SUVs closely meet the needs of their users

In spite of all this, SUVs offer good value for money, according to 72% of those surveyed. It is worth remembering that price and quality, or reliability, are generally the top two criteria for car buyers, which goes a long way towards explaining the huge commercial success of SUVs. But while these vehicles represent good value for money, the results reveal great geographical disparities. Whereas motorists from countries such as South Africa (93%), Mexico (90%) and China (89%) are almost unanimous in their appreciation of the value for money SUVs offer, the Germans (51%) and French (55%) are among the most sceptical in this regard.

In addition to the decent value for money they promise, SUVs are perceived as having spacious interiors that meet the mobility needs of families (28% of the responses gathered). They also

tick two other crucial boxes, with more than a quarter of drivers (26%) stating that they feel safe in these cars, and just under a quarter (23%) believing them to be comfortable — a factor that is all the more important to their users, given that they tend to drive greater distances than non-SUV owners (15,251km/year compared with 13,506km/year).

In terms of usage, certain disparities emerge from one country to the next and particularly between Europe and the rest of the world. Outside of Europe, SUVs are mostly driven in urban areas: 58%, compared with an average of 34% in European countries, where 57% of owners use them in a combination of urban and rural environments.

The key stumbling block is fuel consumption, which is acknowledged as being the main cause of hesitation when buying an SUV by 34% of those who made the leap anyway.

The electrification of SUVs: an additional selling point

A drawback for which SUVs are notorious is their environmental impact, which tends to harm their image. Yet, those surveyed are relatively quiet on this issue, with only 36% of non-SUV owners believing that they pollute more than any other vehicle. Unsurprisingly, an even smaller proportion of those who do own SUVs are of this belief: 23%. However, non-SUV owners from some countries, primarily Germany (61%) and the UK (55%), closely followed by the Netherlands (48%) and France (47%), are much more critical of the polluting nature of SUVs.

The ongoing electrification of automotive markets should at least partially eliminate this problem. Indeed, 77% of those surveyed for the 2022 edition of L'Observatoire Cetelem de l'Automobile believe that producing hybrid or electric SUVs will help reduce the environmental impact of this category of vehicle. Similarly, 71% believe that an electric SUV is more environmentally friendly than a city car or saloon fitted with a combustion engine.

2022 will see further disruption due to the public health crisis

The analysis is unequivocal: the inexorable rise of the SUV is set to continue. Its share of new passenger vehicle market has grown by 15 percentage points worldwide in less than a decade and now stands at 44%. In Europe, it has even doubled, reaching 38%. If we consider intentions to purchase a new vehicle in the next 12 months, which suggest that 29% of non-SUV owners are ready to make the switch to an SUV, it is clear that the market has a bright future ahead of it.

However, one should not lose sight of the severe disruption that affected automotive markets worldwide in 2021 and which is expected to continue into 2022, despite the anticipated improvement — albeit very gradual — in electronic component production. What's more, the public health situation is still unpredictable, rendering the outlook for 2022 uncertain. As the situation currently stands, we expect new car sales to remain broadly stable both in Europe and worldwide.

[Download the full survey](#)

[Watch a replay of the conference](#)

Methodology

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

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

About L'Observatoire Cetelem [@obs_cetelem](#)

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

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

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

For more information and to access all the surveys, [visit the Observatoire Cetelem website](#)

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