



Levallois-Perret, 2 December 2025

PRESS RELEASE

L'OBSERVATOIRE CETELEM DE L'AUTOMOBILE 2026

*An international survey conducted in 13 countries
on a sample of 15,774 people*

"Cars: Five Ways to Bounce Back"

*More than 9 out of 10 French people think that the average
price of new cars is too high*

The automotive sector is in deep crisis in Europe, having been buffeted for several years by the combined effects of successive crises. While China is doing well and establishing itself as the undisputed world leader, Europe, the historic cradle of the car industry, is facing a crisis that is both structural and existential. Against this difficult backdrop, **the Observatoire Cetelem** offers a clear assessment of the situation. With its 2026 edition, it intends to go a step further by identifying **five levers for action** that could **encourage the revival of a sector that is crucial in economic and social terms** in Europe.

Cars are still popular but considered too expensive

9 out of 10 people (92%) say they have a good image of new cars. This image remains positive for used vehicles, but to a lesser extent, with fewer than 8 out of 10 people (79%) expressing satisfaction. It's worth noting that used vehicles are more popular with young people and people living in rural areas, with price playing an important part.

8 out of 10 (79%) believe that this positive image is effectively conveyed by the media. In China, the figure is even more impressive, with 90% in agreement, compared with 72% in France.

However, although cars are popular, they are also considered too expensive: **more than 9 out of 10 French people today (94%, compared with 89% for the world average) think that the average price of new cars is too high.** China stands out, with just over half of respondents (55%) expressing the same opinion.

84% of those surveyed believe that the average price of new cars has risen in recent years; almost 9 out of 10 people in France (88%), and barely half of the population in China (50%). 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.

The French are among the most sceptical: 7 out of 10 people (71%) believe that this increase is unjustified, one of the highest figures in the world, with a global average of 59%. The under-30s stand out from all the other categories in this study in that the majority consider this price increase to be legitimate. What's more, **fewer than 1 in 2 French people (49%, compared with 62% for the world average) believe that new cars offer good value for money overall.**

6 out of 10 respondents (58%) are thinking of buying a new car in the next 5 years. In the Netherlands, Poland and Portugal, purchasing intentions are below 50%. 51% plan to buy a used car, with a peak among the under-30s (63%). 65% of those surveyed believe that it is now easy to resell a new vehicle successfully.

Manufacturers and governments at the heart of recovery

When asked "Who needs to take action first to get the market moving again?", respondents gave top priority to car manufacturers (1 in 3 respondents) and governments (1 in 5). Distributors came third.

More than half of French people (56%) believe that public policies aimed at manufacturers are going in the wrong direction, a score close to that of Germany (61%) and Italy (59%). Asian countries have a more positive opinion: 78% of Chinese people and 65% of Japanese people believe that public policies are moving in the right direction.

3 out of 4 respondents (75%) have a good image of manufacturers, compared with 7 out of 10 French people (69%). Manufacturers are most popular with the Chinese and the Turks (87%). More than 7 out of 10 French people (72%) are very attached to certain car brands, a score similar to the United States (75%) and Germany (76%) and higher than the global average (69%).

9 out of 10 French people (89%, 88% world average) believe that it is important to reduce the environmental impact of new vehicles, but more than half (51%) think that public policies are currently going in the wrong direction on this issue.

More than 7 out of 10 French people (73%, compared with 65% for the world average) say that help-to-buy schemes for buying a new car are unclear, and 8 out of 10 (79%, compared with 71% for the world average) say that they are unstable. Most European car-producing nations share this view, unlike China. Seniors and residents of towns and rural areas take the same view.

Five Ways to Bounce Back

Faced with a car market that is going through a crisis of varying intensity, a revival is hoped for. By listening to motorists, the Observatoire Cetelem has identified five levers that can be used to revitalise the market.

1. Lowering prices

2 out of 3 French people (66%) believe that, to relaunch the market, the priority should be to build new cars that are less expensive but simpler in terms of fittings, aesthetics or power. This is the highest rate in the world, as the global average is only 1 in 2. Seniors are very sensitive to this issue, as are people on modest and median incomes, and people living in rural areas.

Moreover, 4 out of 10 French people (41%, above the European average of 38%) say that a price within their budget is their number one criterion when buying a new car. To bring down the price of cars, 3 out of 4 French people (75% vs. 74% worldwide) think that manufacturers' margins should be cut. More than half of them (52%, compared with 58% worldwide) say that preference should be given to producing cars in countries where labour and/or manufacturing processes are cheaper, even if this has a negative environmental or social impact.

2. Stabilising public policies

The importance and impact of public policies on the structure and volume of new car sales is well established. However, public policies are considered unclear by 73% of the French and

68% of Europeans, and are also seen as unstable (79% of the French and 73% of Europeans). These uncertainties and this lack of clarity and simplicity lead to a wait-and-see attitude.

In addition, almost **3 out of 4 French people (73%, two points higher than the world average) say that certain standards and regulations should be relaxed.** A similar percentage were in favour of adjusting these standards according to the type of vehicle and road used. Young people and people living in large cities are the most likely to support these measures.

3. Betting on design and the emotional dimension

7 out of 10 French people (69%, 70% for the world average) say they are very interested in the aesthetics and design of their car. This feeling is even stronger among the Chinese (89%), where the ostentatious side to cars has persisted more than in other countries in recent years. This is also the case in Poland (78%), Portugal (76%) and Italy (75%). Younger generations and those on higher incomes claim to be the most receptive to design.

More than 6 out of 10 French people (63%) say they are attracted by the design of today's new cars and that they offer a variety of designs. The same percentage (63%) say they have already been attracted by the look of a car seen in the street. Finally, only a third (34%) say they pay more attention to new models coming onto the market than they did 10 years ago.

4. Simplifying the offering

As part of the drive to lower prices, rethinking the range of cars on offer would seem to be an appropriate way to revive the market, according to motorists. **More than a third of respondents in France (38%, 32% worldwide) encourage the production and sale of vehicles with fewer customisation options.** Next comes the reduction in driving aids to cut costs, cited by 26% of respondents worldwide (26%), ahead of the production of smaller, lighter vehicles (24%).

Faced with rising new car prices, the second-hand market is becoming a must. **7 out of 10 French people (71%) say that the sale of used or reconditioned cars should be favoured over the sale of new vehicles.** Japan is the only country not to be in favour (41%).

5. Trusting distributors

Like manufacturers, dealers have a positive image: more than two-thirds of French people (67%, 68% worldwide) have a good image of them, and the same percentage (66%) have a good image of salespeople. Globally, 7 out of 10 respondents trust dealers and their salespeople to understand their needs (73%), which in turn leads to advice that they feel is appropriate for making the right purchase (71%).

However, **more than half of French people (57%, compared with 49% for the world average) believe that public policies related to car distribution are going in the wrong direction. Along with the Germans (60%), they are among the most sceptical.**

When it comes to digital channels, opinions are divided. **Just over 4 out of 10 French people (43%) say they are prepared to buy a new car entirely online,** compared with 8 out of 10 Chinese people (79%). The inability to test-drive the vehicle before purchase (25%), the fear of problems or defects that are not visible (18%) and the preference for human contact at the dealership (17%) are the major obstacles to online purchasing.

"What if the automotive sector needed to believe in itself more? We do have levers within our reach. The effectiveness of their activation can be backed up by the continuing appeal of the car. This survey 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," concludes **Flavien Neuvy, Head of L'Observatoire Cetelem.**

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 was 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.

About BNP Paribas Personal Finance and Cetelem

BNP Paribas Personal Finance is the leading consumer finance company in France and Europe, offering a wide range of consumer credit products. A fully-owned subsidiary of BNP Paribas, the company offers a full range of personal loans in stores, at car dealerships or directly to customers through its customer contact centres and online. To support its customers and partners, BNP Paribas Personal Finance is committed to promoting access to more responsible and sustainable consumption.

About L'Observatoire Cetelem

Founded in 1985, L'Observatoire Cetelem is the economic research and intelligence unit of BNP Paribas Personal Finance. Its dual purpose is to observe, shed light on and decipher changes in consumption patterns and mobility in France and internationally, and also to anticipate future changes by looking ahead and making forecasts. To fulfil this dual objective, over 40 years ago L'Observatoire Cetelem set up a programme founded on diverse and complementary content, with two highly reputed annual surveys conducted at an international level, one on motoring and the other on consumer spending.

For more information and to access all our surveys, visit the Observatoire Cetelem website | @obs_cetelem

Press contacts: Rumeur Publique

Marie Goislard | marie@rumeurpublique.fr | +33 6 21 23 37 75

Romain Monneret | romain.monneret@rumeurpublique.fr | +33 6 26 18 36 77

Léo Chompré | leo.chompre@rumeurpublique.fr | +33 6 14 35 41 74