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PRESS RELEASE

L'OBSERVATOIRE CETELEM DE L'AUTOMOBILE 2027

An international survey conducted across 13 countries on a sample of 15,770 people

Automotive: economic patriotism put to the test by purchasing power

7 in 10 French people have already decided against buying a car brand because of price

The car continues to occupy a unique place in the daily lives of French people. It enables mobility, still embodies a form of freedom and remains associated with powerful ideas surrounding brands, industrial expertise and innovation.

Yet behind this attachment, one reality stands out: when choosing their next vehicle, motorists are first and foremost price-conscious consumers. Against a backdrop of rising car-related costs and rapid market transformation, economic considerations now outweigh symbolic preferences. This is one of the key findings of the 2027 Cetelem Automotive Observatory, conducted among 15,770 motorists in 13 countries, including 3,151 in France.

The automotive industry remains strategic for France

Beyond its role in everyday travel, the automotive sector retains major economic and social significance. The industry continues to carry substantial weight in the French economy: France has 743,000 automotive-related jobs, representing 2.4% of the working population. The market remains fragile: between 2019 and 2025, passenger car sales fell by 26% in France, a sharper decline than in neighbouring European countries (-21% in Germany, -20% in Italy and -9% in Spain). The household purchase rate in France stood at 2.3% in 2025, with 749,000 private registrations.

This explains why cars are far more than ordinary consumer goods. They remain associated with industrial sovereignty, expertise and national economic identity. Indeed, 23% of motorists surveyed worldwide cite the automotive sector as the industry that best reflects a country's economic strength.

French people want to keep driving, but differently

Despite economic uncertainty and profound changes in the automotive market, cars continue to feature prominently in household plans: internationally, 1 in 3 motorists (29%) plans to buy a vehicle within the next 12 months. Among those intending to buy a new car, 68% of French respondents, compared with 70% across the 13 countries, already know which brand they will choose.

At the same time, habits are changing. Rising energy costs are leading motorists to rethink mobility, particularly in France, and increasing interest in more fuel-efficient vehicles. Over the past six months, 52% of French people who own at least one car have reduced non-essential journeys because of fuel prices, compared with 41% across all countries surveyed.

In this context, 6 in 10 French motorists (60%) and more than half of motorists worldwide (52%) are considering buying an electric or hybrid vehicle. In France, electric vehicles' share of new car registrations rose from 20% in 2025 to 30% over the first eight months of 2026.

"The shift to electric mobility is no longer solely an environmental issue: it is also becoming a response to the new economic constraints associated with car use. The geopolitical context and the surge in fuel prices have accelerated the energy transition by at least two years. Without them, we would probably have had to wait until the end of 2028 at the earliest to reach this 30% threshold," says Flavien Neuvi, Director of the Cetelem Observatory.

French motorists remain attached to domestic brands, but not at the expense of rational choices

Brand origin retains symbolic importance in car purchasing decisions. In France, a country with long-established domestic manufacturers, almost 1 in 2 motorists say they would prefer to buy a national brand (48%). However, the concept is becoming increasingly blurred: for motorists, a brand's nationality is primarily defined by the country where its cars are produced and assembled (34%) and the country where the brand originated (33%), well ahead of the country where its owner is based (15%).

Yet this emotional connection does not mean that a brand's origin is enough to secure a purchase. In fact, 71% of French people have already decided against a brand because of price, compared with 62% across the 13 countries. When choosing between two equivalent new cars, one a more expensive domestic model and the other a cheaper foreign model, respondents are evenly split: 50% would choose the former and 50% the latter.

Moreover, only 3 in 10 motorists in France (30%) and worldwide (32%) have already decided against buying a foreign car brand they liked in order to favour a brand from their own region. A preference for domestic brands therefore exists, but it remains subject to market realities.

Price is the leading purchase criterion for French motorists

While brands continue to play a role in motorists' emotional attachment to cars, price is the leading criterion when choosing a vehicle. Across the 13 countries surveyed, it is cited by 39% of new-car buyers and 52% of used-car buyers. It ranks ahead of safety (32% and 26%), reliability (27% and 25%), running costs (19% and 23%) and brand (18% and 16%). Financial considerations therefore outweigh symbolic ones: the country of production is a major criterion for only 6% of new-car buyers and 4% of used-car buyers, far behind price, safety and reliability.

French motorists are among the most price-sensitive: it is the leading criterion for 50% of them, ahead of reliability (30%), safety (26%), running costs (20%) and brand (19%).

Furthermore, when asked what matters in a brand, 90% of motorists worldwide consider its price positioning important, well ahead of innovation (66%), country of production (56%) and brand nationality (55%). Customer relationships are also decisive: 3 in 4 motorists (75%) attach importance to the size of the distribution network and after-sales service, while almost 7 in 10 (67%) highlight the dealer's influence when choosing a brand.

Quality matters more than origin in brand loyalty

When replacing their car, almost 7 in 10 motorists (69%) remain loyal to the same brand. They primarily cite quality (40%), previous satisfaction (39%) and trust (37%) as the main reasons for their loyalty. Price is also an important consideration, cited by 34%.

By contrast, brand origin plays only a limited role in loyalty: it is cited by just 10% of motorists, although respondents consider that this dimension is reflected to some extent in the top three criteria.

"The automotive industry has always been a story of nations and brands. Brands have shaped our imaginations, built trust and accompanied generations of motorists. But today, that story is colliding with an unavoidable reality: price. The 2027 Cetelem Automotive Observatory shows that while brand origin still matters and attachment remains strong, purchasing decisions are driven above all by economic considerations. Between loyalty, identity and financial constraints, motorists are forging a new relationship with the car, in which the ability to provide accessible mobility will be more decisive than ever," concludes **Flavien Neuvy, Head of L'Observatoire Cetelem**.

[CLICK HERE TO DOWNLOAD THE FULL STUDY REPORT](#)

Methodology:

The economic and marketing analyses and forecasts were produced in partnership with C-Ways, a research and consulting firm specialising in forward-looking marketing. The surveys were conducted online and simultaneously by Harris Interactive in 13 countries: nine in Europe (Belgium, France, Germany, Italy, the Netherlands, Poland, Portugal, Spain and the United Kingdom), as well as China, Japan, Turkey and the United States. Thirteen samples representative of the national population aged 18 and over in each country were surveyed from 8 to 19 June 2026. In total, 15,770 people were surveyed across the different countries. Representativeness was ensured using the quota method and weighting applied to the following variables: gender, age, region of residence and income level, or socio-professional category in France, in each country. Each country was then weighted within the overall sample according to the size of its total population. A total of 3,151 interviews were conducted in France and more than 1,000 in each of the other countries.

About BNP Paribas Personal Finance | Cetelem

BNP Paribas Personal Finance is a major provider of personal financing in France and Europe through its various consumer credit activities. A wholly owned subsidiary of the BNP Paribas Group, the company offers a comprehensive range of personal loans available in stores, at car dealerships, directly through its customer relations centres and online.

Serving its customers and partners, BNP Paribas Personal Finance is committed to promoting access to more responsible and sustainable consumption.

About L'Observatoire Cetelem

Created in 1985, the Cetelem Observatory is BNP Paribas Personal Finance's economic research and intelligence unit. Its twofold purpose is to observe, explain and analyse changing consumption and mobility patterns in France and internationally, while also anticipating future developments through forward-looking analysis and forecasts.

To fulfil this dual purpose, for more than 40 years the Cetelem Observatory has developed a programme based on a diverse and complementary range of content, including two benchmark international studies each year: one on the automotive sector and the other on consumption.

For more information and all the studies, visit the Cetelem Observatory website | @obs_cetelem l'Observatoire Cetelem@obs_cetelem

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