

Europeans are not giving up their cars : 8 in 10 consider them essential despite budget pressures

For its 16th edition, Aramis Group's annual barometer takes on a new dimension. In order to fully capture the shifts taking place in the market, put the French situation into perspective and extend this work to other geographies, the "The French and the Car" barometer becomes today "Europeans and the Car". This new barometer, conducted by OpinionWay among more than 7,000 motorists across seven countries, reveals a structural shift: the car remains essential, but is becoming increasingly difficult to finance. In this context, motorists are looking for more accessible, reliable and cost-controlled solutions, expectations that sit at the very heart of Aramis Group's positioning as the European leader in online sales of refurbished used vehicles.

Personal mobility is undergoing a profound transformation across Europe. Against a backdrop of geopolitical pressures on fuel prices, debates about the future of combustion-engine vehicles and growing household budget constraints, the same question arises in every market: how to keep moving when the cost of owning a car weighs increasingly on household budgets? To measure the scale and nuances of this shift, Aramis Group, the European leader in online sales of refurbished used vehicles, commissioned OpinionWay to conduct an unprecedented barometer across France, the United Kingdom, Italy, Belgium, Germany, Austria and Spain.

The results reveal a structural paradox shared across all seven markets: the car is both indispensable, 88% of Europeans say they cannot manage without one, and considered a luxury by 80% of them. This is the signal of a structural transformation in the market, already visible in purchasing behaviours.

Key figures from the study

- **95% of Europeans** feel that getting around costs more and more, from 93% in the United Kingdom to 98% in Italy
- **8 in 10 Europeans** consider the car essential despite budget pressures
- **88% of Europeans** say they cannot get around as they would like without a car
- **92% support a fuel price cap** to limit rising fuel costs
- **64%** have already reduced non-essential travel; **38%** have postponed changing their vehicle
- **60%** would consider an electric or hybrid vehicle for their next purchase, yet **61%** view positively the decision to drop the ban on new combustion-engine vehicle sales from 2035

Essential yet under pressure: an automotive paradox across Europe

Across the seven countries surveyed, the car remains the central tool of personal autonomy. Yet it is now experienced as an unavoidable cost, much like housing, energy or food. 95% of Europeans feel that getting around costs more and more, while 57% consider the car their single largest household expense. This figure reaches 62% in the

United Kingdom and falls to 49% in Austria, revealing very different levels of pressure depending on the country.

Fuel dependency further amplifies this tension. 95% of Europeans believe that international tensions will have a lasting impact on pump prices, and 92% call for a fuel price cap, rising to 96% in Spain. This near-unanimous support reveals that mobility is now perceived as an essential need, on a par with energy or food, rather than a simple consumer choice.

Budget constraints are accelerating automotive trade-offs

Budget pressures are not merely perceptual: they are transforming behaviour. Across Europe, 64% of motorists have reduced the frequency of non-essential journeys, 38% have postponed buying a new vehicle and 30% have deferred maintenance work due to cost. This shift affects not only the purchase decision, it is redefining everyday usage.

Budget disparities between countries highlight the scale of the gaps. The monthly amount motorists say they can devote to financing a new vehicle ranges from €283 in France, the lowest in the study, to €443 in Austria. This €160 gap reflects very different levels of tax pressure, running costs and economic uncertainty across markets.

Rational buying has replaced aspirational buying

Against this backdrop, the car-buying decision is changing in nature across Europe. Motorists no longer come looking for a car they like, they come looking for a car they can afford. Price remains central, but it is now assessed alongside monthly payments, fuel consumption, maintenance, reliability and warranty. This cluster of criteria systematically takes precedence over brand, aesthetics or onboard technology.

This is precisely what Aramis Group addresses: more affordable, more transparent and more reliable mobility, across Europe.

A transition that is wanted, but not at any cost

European motorists are not rejecting the automotive transition, they are questioning its conditions. 60% would consider an electric or hybrid vehicle if buying tomorrow, with significant gaps between Spain at the top (70%) and Austria at the lower end (50%).

Yet this openness coexists with a demand for realism: 61% of Europeans view positively the decision to drop the ban on new combustion-engine vehicle sales from 2035, a figure that peaks at 75% in the United Kingdom and falls to 53% in Belgium. This is not a rejection of electrification; it is a demand for conditions: financial accessibility, vehicle availability and fit-for-purpose infrastructure.

Refurbished vehicles: from alternative to considered choice

In France, Europe's most mature market for refurbished vehicles, brand awareness of the concept has grown by 10 points in four years, rising from 63% in 2022 to 73% in 2026. This

progression confirms that the rationalisation of car buying is already under way and that refurbished vehicles are among its first beneficiaries. The refurbished vehicle is no longer seen as a fallback option, but as a direct response to new purchasing priorities. Among those who are aware of it, 86% believe it is cheaper than a new vehicle, 72% that it offers more reliable guarantees than standard used vehicles, and 77% that it should be eligible for public financial support.

Nicolas Chartier and Guillaume Paoli, co-founders¹ of Aramis Group: *"This barometer says something precise about the moment we are living through. Europeans are not rejecting the car, the transition, or innovation. They are simply asking that all of this become compatible again with their economic reality. That is a legitimate demand, and it is precisely what we are responding to, across Europe."*

About Aramis Group — www.aramis.group

Aramis Group is the European leader for B2C online used car sales and operates in six countries. A fast-growing group, an e-commerce expert and a vehicle refurbishing pioneer, Aramis Group takes action each day for more sustainable mobility with an offering that is part of the circular economy. Founded in 2001, it has been revolutionizing its market for 25 years, focused on ensuring the satisfaction of its customers and capitalizing on digital technology and employee engagement to create value for all its stakeholders. With annual revenues of more than €2.3 billion, Aramis Group sells more than 119,000 B2C vehicles and welcomes close to 70 million visitors across all its digital platforms each year. The Group employs more than 2,400 people and has nine industrial-scale refurbishing centers throughout Europe. Aramis Group is listed on Euronext Paris Compartment B (Ticker: ARAMI – ISIN: FRO014003U94)

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¹ Nicolas Chartier is Chairman and Chief Executive Officer of the Company, and Guillaume Paoli is Deputy Chief Executive Officer, based on a 2-year rotation