The Automotive Market Shake-Up:
How to Lead the Next Decade?

NIQ & BCG Worldwide Mobility Navigator



2026-2027

NielsenIQ GfK

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Europe Mobility Barometer 2026

Releasing exclusive insights



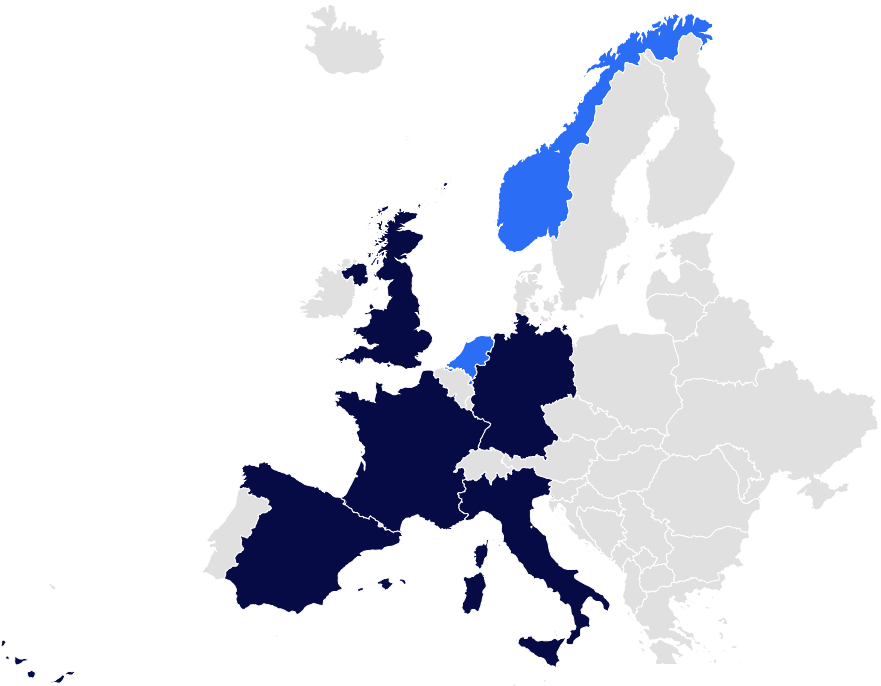
Automotive population

Either owning or intending to own a vehicle

Representative through demographics quotas

Fieldworks from
July 2nd to 20th 2026

Europe focus



Countries set in Europe average

Quantitative samples

Europe	
France	1000
Germany	1000
Italy	1000
Netherlands	500
Norway	500
Spain	1000
UK	1000

Insightful benchmarks

North America	
USA	1000
South America	
Brazil	1000
Asia Pacific	
China	1000

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Price always MATTERS

Petrol costs fuel EV rise

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“

Working with our suppliers to lower vehicle prices and improve our customers’ purchasing power

”

« Nous concentrer avec nos fournisseurs sur la baisse du prix des véhicules au bénéfice du pouvoir d’achat de nos clients »

François Provost, CEO Renault Group

Europe Motorshow – Oct 13th 2026 – Paris

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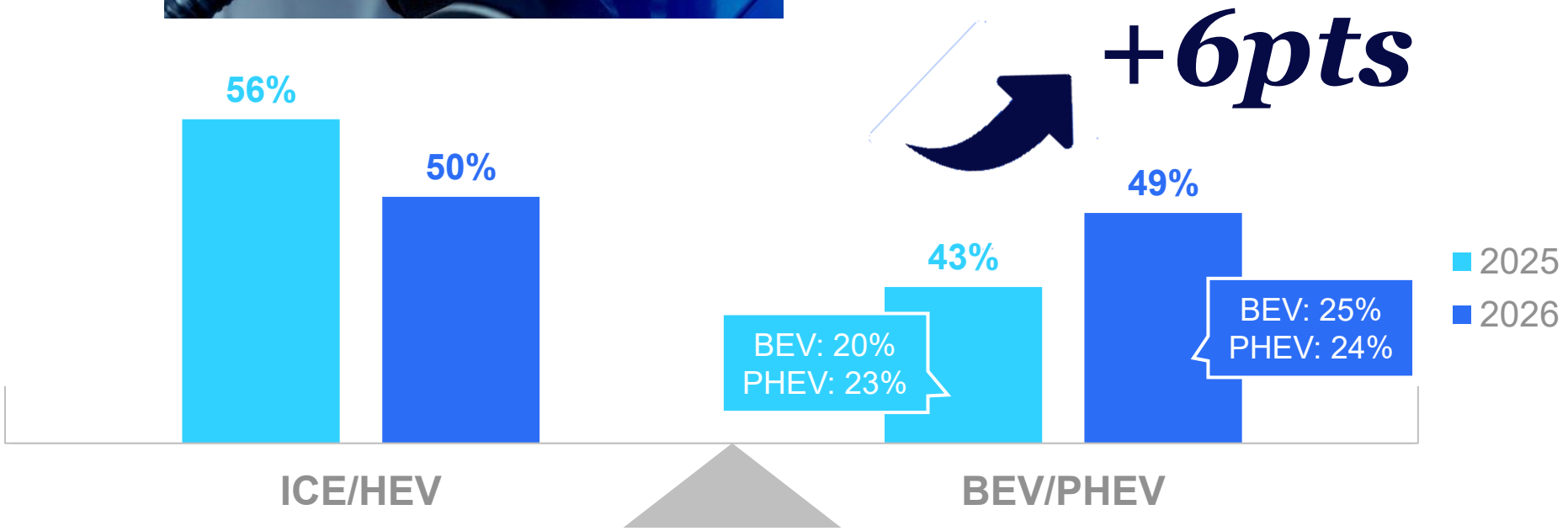
Rising fuel prices are boosting the attractiveness of electric vehicles

And BEV at first -from far



+78.96%

In just 12 months (Oct 2026)



(Among brand new car purchase intenders)

Source: Gasoline - Price - Chart - Historical Data - News

(1) NIQ-BCG Mobility Navigator Study 2026 - Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain) - Questions: Which vehicle will most likely be your first choice? - Target: Brand new car purchase intenders (2026 n=2335 / 2025 n=2328)

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New brands on chess openings

First moves, but the game to be played

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In 2026, the real race begins

Total aided awareness ***(Brand name + logo)***

In 1 just year, Jaecoo & Leapmotor x2 on awareness …



Top speeders

JAECOO	LEAPMOTOR	OMODA	BYD	XPENG	LYNK&CO
+23pts (45%)	+18pts (38%)	+17pts (40%)	+13pts (73%)	+11pts (38%)	+10pts (40%)
And +3.3pts spontaneously		And +2.1pts spontaneously	And +4.9pts spontaneously		

…and enters the top ranking



Top rankers

MG	CUPRA	BYD	polestar	JAECOO	OMODA
83% (+2pts)	83% (+3pts)	73% (+13pts)	62% (+5pts)	45% (+23pts)	40% (+17pts)

Source: NIQ-BCG Mobility Navigator Study 2026
Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain)
Questions: Please indicate how familiar you are with each car make. / What car brands that have entered your market in the last 5 years can you think of?
Target: Car owners and/or purchase intenders (2026 n=5005 / 2025 n=5004)

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Speeders are …racing!

All at the Europe Motorshow for showcasing the offerings

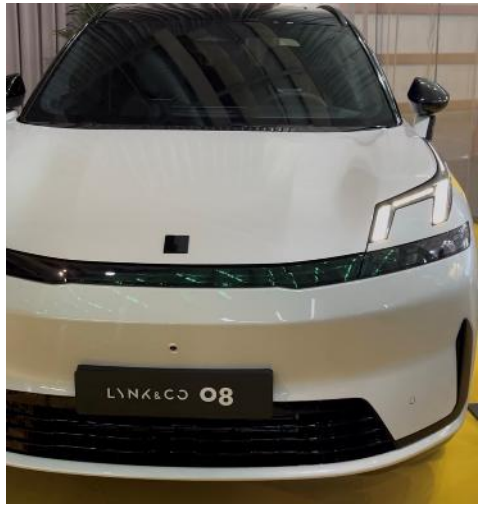
JAECOO
OMODA
LEAPMOTOR
BYD
XPENG
LYNK&CO











Top speeders





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Tech is the new engine

What powers it?

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I believe that **technology**, *starting from* **AI** *(…) is accelerating very strong* **transitions**

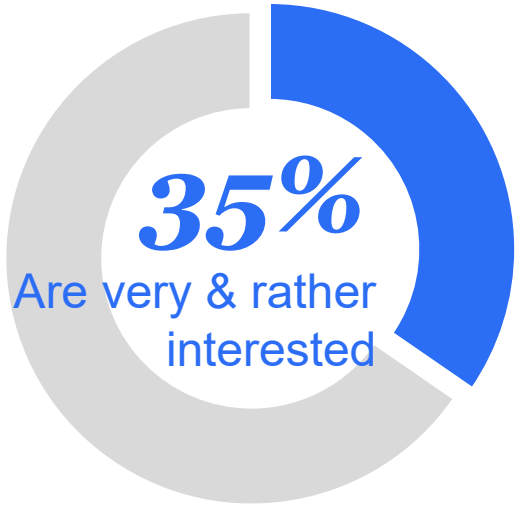
Antonio Filosa, CEO Stellantis

Europe Motorshow – Oct 13th 2026 – Paris

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Trust in vehicle tech is growing





In taking a ride in a
fully autonomously
driving taxi service

+5pts
Vs. 2025



To have semi or highly
Automated
driving

+3pts
Vs. 2025

Source: NIQ-BCG Mobility Navigator Study 2026
Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain)
Questions: How much are you interested in… / According to you, how helpful are the following “Driver Assistance Systems”?
Target: Car owners and/or purchase intenders (2026 n=5005 / 2025 n=5004)

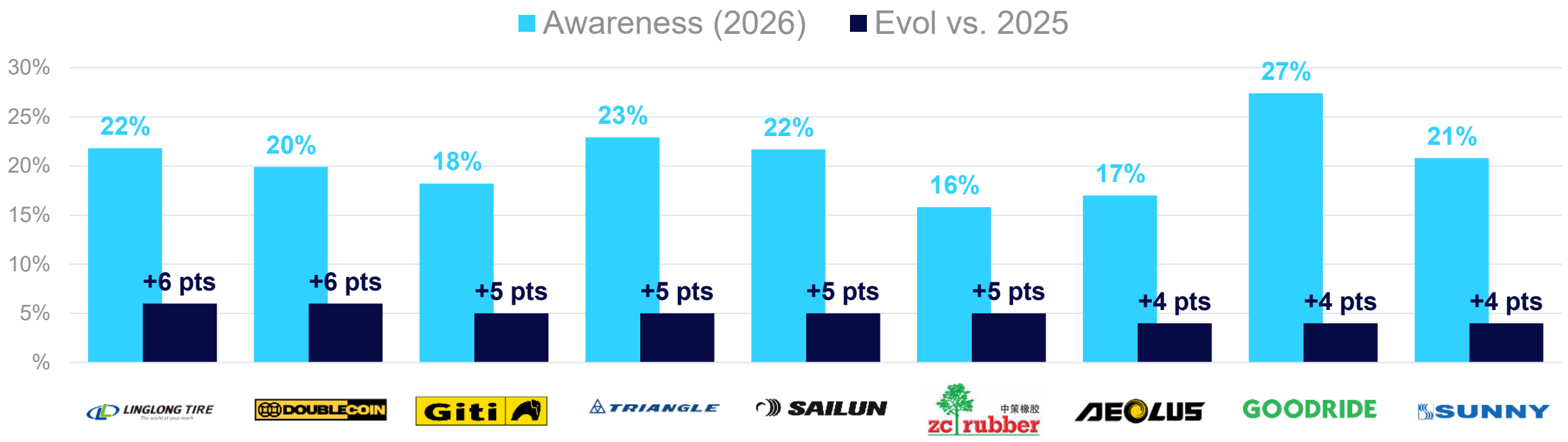
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Impacts beyond vehicle manufacturers

From tires to alternative mobility and motorbikes

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Chinese tires brand follow the positive momentum



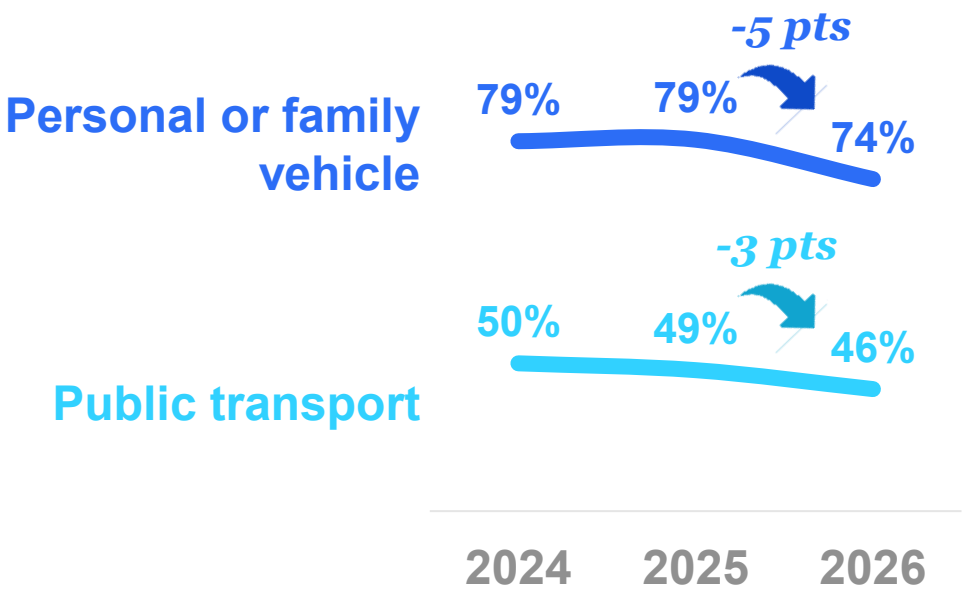
Source: NIQ-BCG Mobility Navigator Study 2026
Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain)
Questions: You will now see several tire brands. You may not be familiar with some of them, and that's perfectly fine. Please indicate how familiar you are with each tire brand.
Target: Car owners (2026 n=4767 / 2025 n=4781)

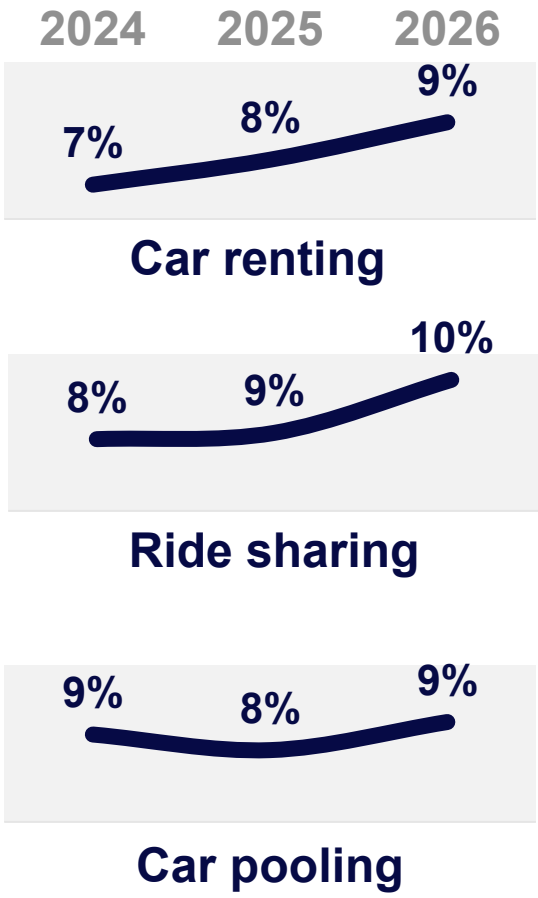
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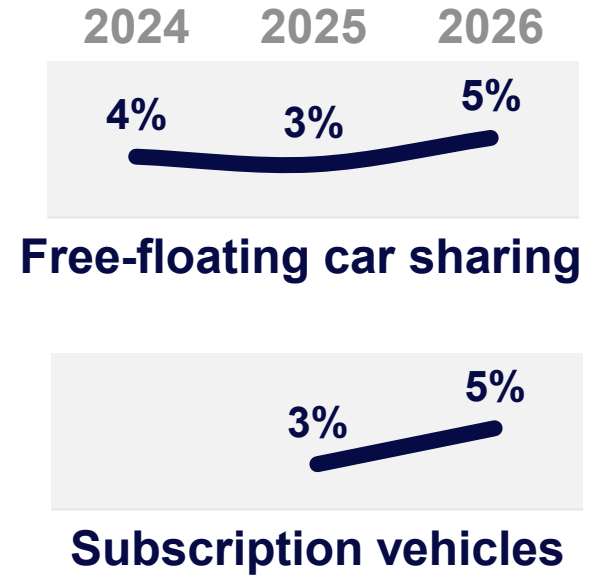
Intentions to try alternatives to personal vehicle tend to gain interest

While public transports may not be gaining traction from this trend

Which of the following forms of transportation will you likely use in the next 30 days?







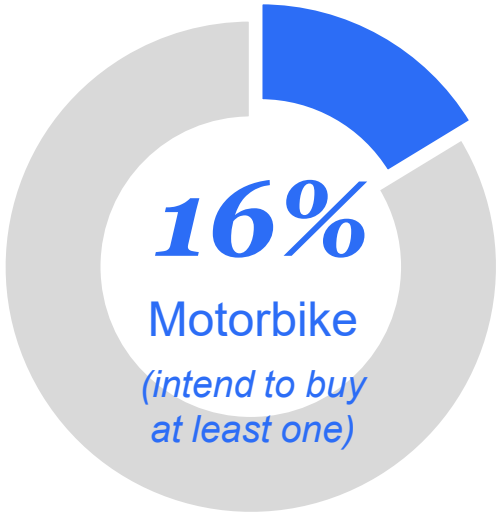
Source: NIQ-BCG Mobility Navigator Study 2026
Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain)
Questions: Which of the following forms of transportation will you likely use in the next 30 days?
Target: Car owners and/or purchase intenders (2026 n=5005 / 2025 n=5004 / 2024 n=2504)

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Meanwhile –light fuel consumption alternatives are also gaining traction

A surge of appeal for motorbikes





+3 pts

+1 pt
At 6%



Motorbike
(combustion engine)

+1 pt
At 5%



Motorbike
(electric engine)

+2 pts
At 5%



Motorbike scooter
(combustion engine)

+2 pts
At 5%



Motorbike scooter
(electric engine)

Source: NIQ-BCG Mobility Navigator Study 2026
Data perimeter: Europe 5 (Germany, UK, France, Italy, Spain)
Questions: Which of the following means of transportation do you or your household intend to buy in the near future?
Target: Car owners and/or purchase intenders (2026 n=5005 / 2025 n=5004 / 2024 n=2504)

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Let's keep in touch

Looking forward sharing our views

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Thank you!

Any question? Reach us out!

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