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2025 Global Automotive Consumer Study

Key Findings: INDIA

April 2025

Foreword

The Indian automotive industry is transforming significantly, driven by evolving consumer preferences, regulatory shifts and rapid technological advancements. While interest in hybrids and All-Battery-Powered Electric Vehicles (BEVs) persists, Indian consumers are also exploring Internal Combustion Engine (ICE) options, influenced by affordability considerations and anxieties associated with EVs.

EVs continue to attract interest due to their environmental benefits and cost savings. Consumers acknowledge the promise of lower emissions and reduced fuel and maintenance costs; however, affordability remains a key challenge. Many are open to paying more for EVs, provided concerns around charging infrastructure, range and battery costs are addressed.

The most important aspect of an EV charging experience, is “fast charging”. A pragmatic approach to charging infrastructure that focuses on accessibility and reliability is essential.

A growing number of consumers are considering switching brands, driven by the desire to try something new and upgrade to a premium brand. This trend reinforces the need for deeper customer engagement. Younger consumers, are increasingly open to giving up traditional vehicle ownership in favour of Mobility-as-a-Service (MaaS) solutions, reflecting evolving financial and lifestyle considerations.

The Union Budget 2025 reaffirms government support for domestic manufacturing, infrastructure and demand growth. Tax exemptions are expected to boost sales in the two-wheeler and entry-level four-wheeler segments. Measures to rationalise duties on critical EV components and promote local production will strengthen the EV ecosystem.

Recognising the evolving challenges in the automotive industry, the Global Automotive Consumer Study was initiated over a decade ago to better understand market trends from a consumer-driven perspective.

This report highlights key insights across four core areas: EV adoption, future purchasing preferences, connectivity and shared mobility. As India's automotive landscape transforms, integrating innovation, regulatory policies and consumer expectations will be critical to long-term growth. This study aims to provide industry leaders with actionable insights to successfully navigate the future

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Key findings

Consumers weigh EV benefits against practical challenges

While interest in hybrids and Battery Electric Vehicles (BEVs) persists, some Indian customers are also exploring gasoline and diesel options, influenced by affordability considerations. Factors such as charging times, infrastructure availability and battery safety remain key considerations in EV adoption.

Indian customers willing to pay more and share data for anti-theft tracking

About 88 percent of Indian customers are willing to pay extra and share their personally identifiable information in exchange for anti-theft tracking updates, a trend also observed in other economies.

A significant number of customers may be thinking about switching vehicle brands

A growing number of customers are looking to switch brands, with product quality, vehicle performance and features emerging as the top three factors influencing their choice for the next vehicle. Brand affinity remains strongest for domestic automakers among customers.

Younger customers show interest in MaaS over ownership amid financial concerns

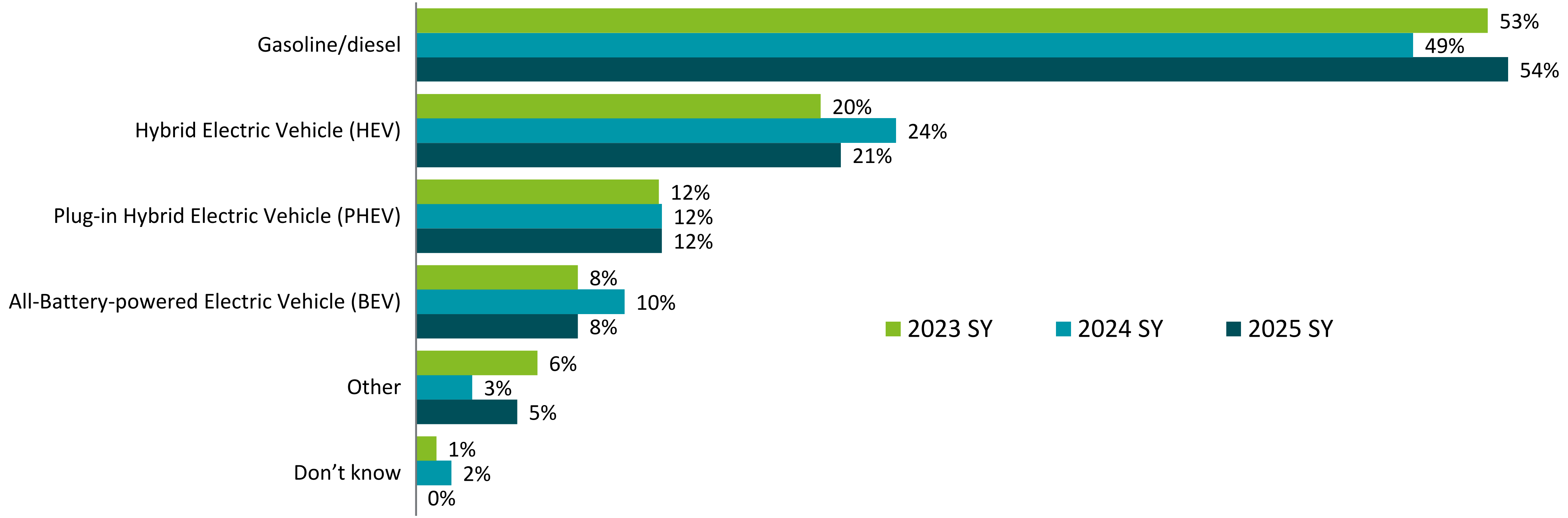
A large share of 18–34-year-olds prefer shifting from traditional vehicle ownership to Mobility as a Service (MaaS) due to economic uncertainty. Nearly two-thirds expect to pay under INR30,000 per month for their next vehicle.

Source: Global Automobile Consumer Survey 2025

1 Vehicle electrification

While interest in hybrids and BEVs remains, Indian customers are also evaluating gasoline and diesel vehicles, partly due to ongoing affordability concerns

Preference for type of engine in next vehicle



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol and hydrogen fuel cells; don't know responses weren't considered; SY stands for Study Year.

Q41. What type of engine would you prefer in your next vehicle?

Sample size: n= 957 [2023]; 864 [2024]; 882 [2025]

Source: Global Automobile Consumer Survey 2025

The appeal of EVs lies in their eco-friendly image, lower emissions and long-term savings on fuel and maintenance, making them a preferred sustainable choice

Reasons for choosing an EV for next vehicle

Environmental concern is the second most important factor driving EV adoption in US, China and Japan.

#1

63%
Concern for the environment

56%
Lower fuel cost

45%
Less maintenance

31%
Potential for extra taxes/levies applied to internal combustion vehicles (diesel)

50%
Driving experience

45%
Government incentives/subsidies/ stimulus programmes

30%
Potential ban on sale of new internal combustion vehicles

48%
Ability to use the vehicle as a backup battery/power source

44%
Concern about personal health

10%
Peer pressure

Q42. Which of the following factors have had the greatest impact on your decision to acquire an electrified vehicle? Please select all that apply.

Sample size: n= 364

Source: Global Automobile Consumer Survey 2025

Affordability remains a key challenge for the automotive industry, as three-fourths of customers expect to spend less than INR25 lakh on their next vehicle, yet many are open to paying more for an EV

Preferred price ranges for next vehicle

	Overall		ICE intender		EV intender	
Less than INR5,00,000	4%	21%	5%	24%	2%	15%
INR5,00,000 to less than INR10,00,000	17%		19%		13%	
INR10,00,000 to less than INR15,00,000	27%	54%	25%	49%	29%	62%
INR15,00,000 to less than INR25,00,000	27%		24%		33%	
INR25,00,000 to less than INR50,00,000	15%		16%		15%	
INR50,00,000 or more	8%		10%		6%	
Don't know/not sure	1%		1%		2%	

The proportion of respondents willing to spend less than INR25 lakh has declined from 80 percent in 2024, primarily driven by a decline in ICE vehicle intenders

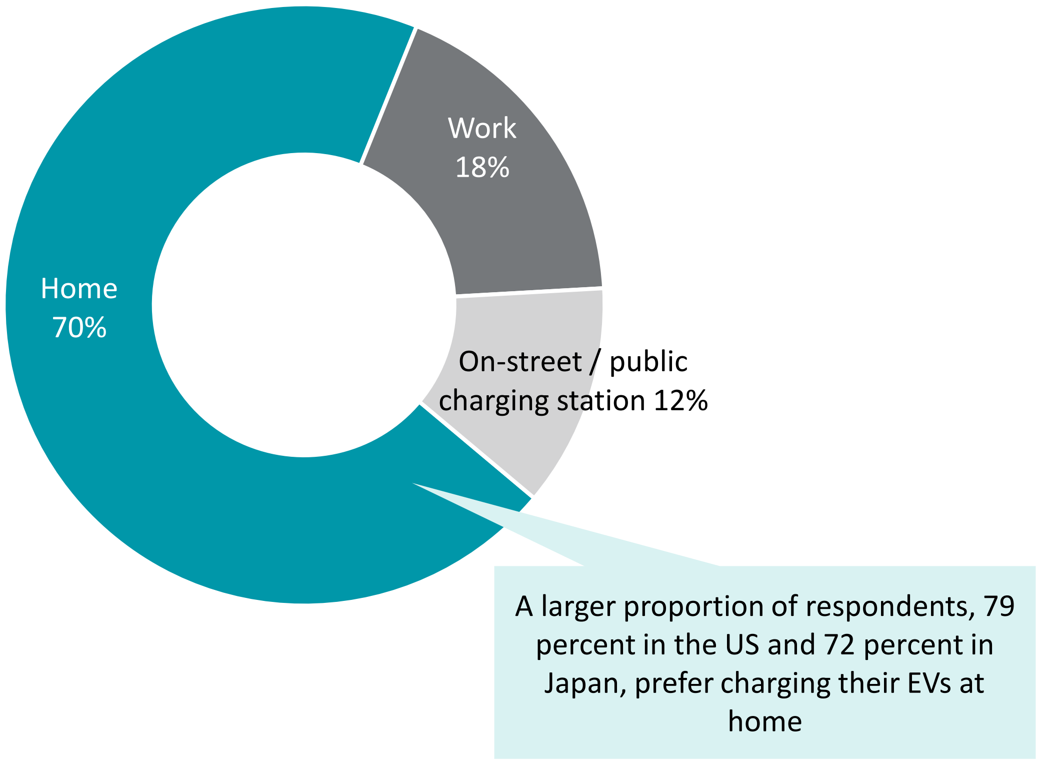
Q32. In which of the following price ranges will you be shopping for your next vehicle? (Please indicate what you would expect to pay after any discounts and/or incentives that might be available).

Sample size: [Overall] n= 838; [ICE intender] n= 474, [EV intender] n= 364

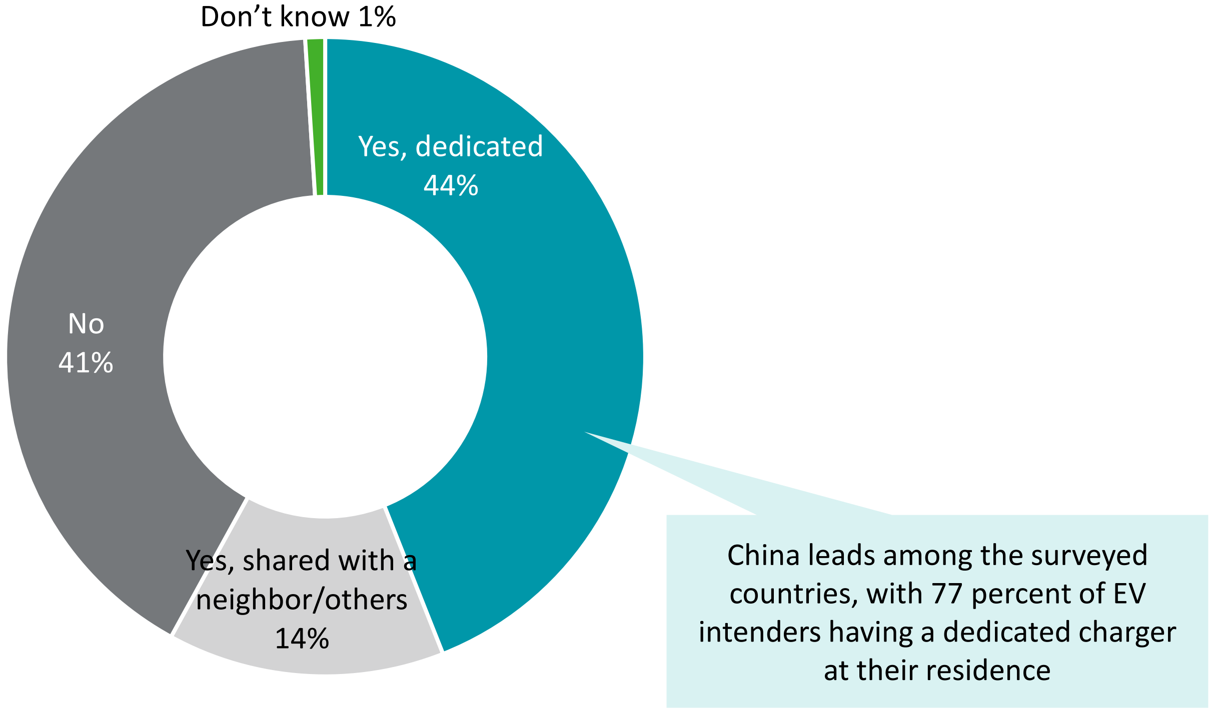
Source: Global Automobile Consumer Survey 2025

70 percent Indian EV buyers intend to charge their vehicles at home, making accessible home charging solutions and financing options essential to cover these additional costs

Expecting to charge electrified vehicle most often at...



EV charger access among consumers who plan to charge their vehicle at home



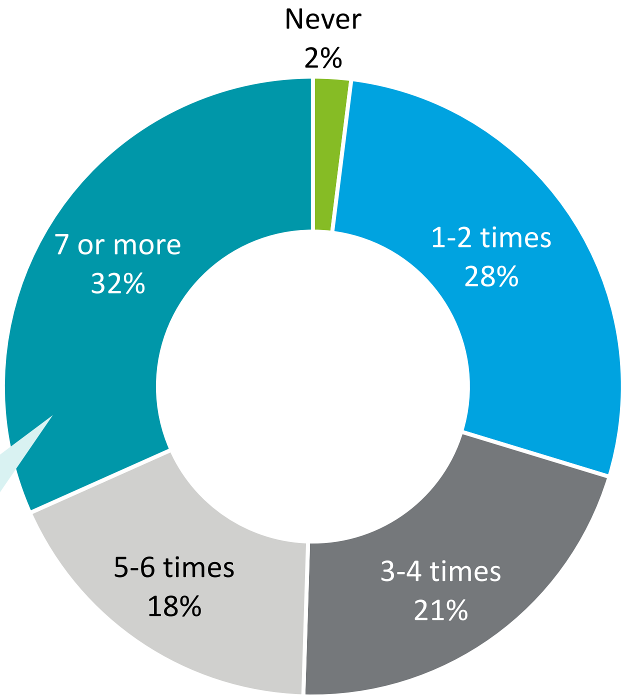
Q43: Where do you expect to charge your electrified vehicle most often?; Q44: Do you already have access to a charger at your residence?

Sample size: n= 182 [Q43]; 128 [Q44]

Source: Global Automobile Consumer Survey 2025

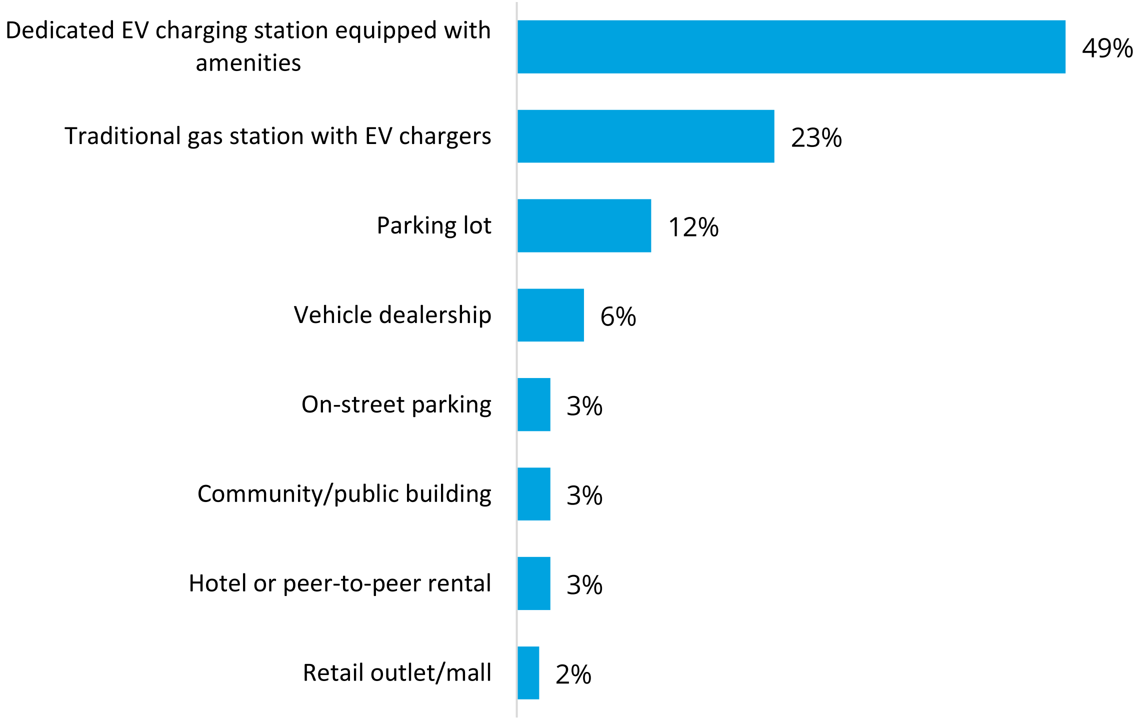
Public EV charging investment in India is essential, as customers frequently drive long distances and prefer dedicated facilities for enhanced accessibility and technology

How often did consumers drive more than 100 km from their homes last month?



India has the highest share of respondents who travelled over 100 km from home at least seven times in the past month among all surveyed economies.

Preferred public charging location



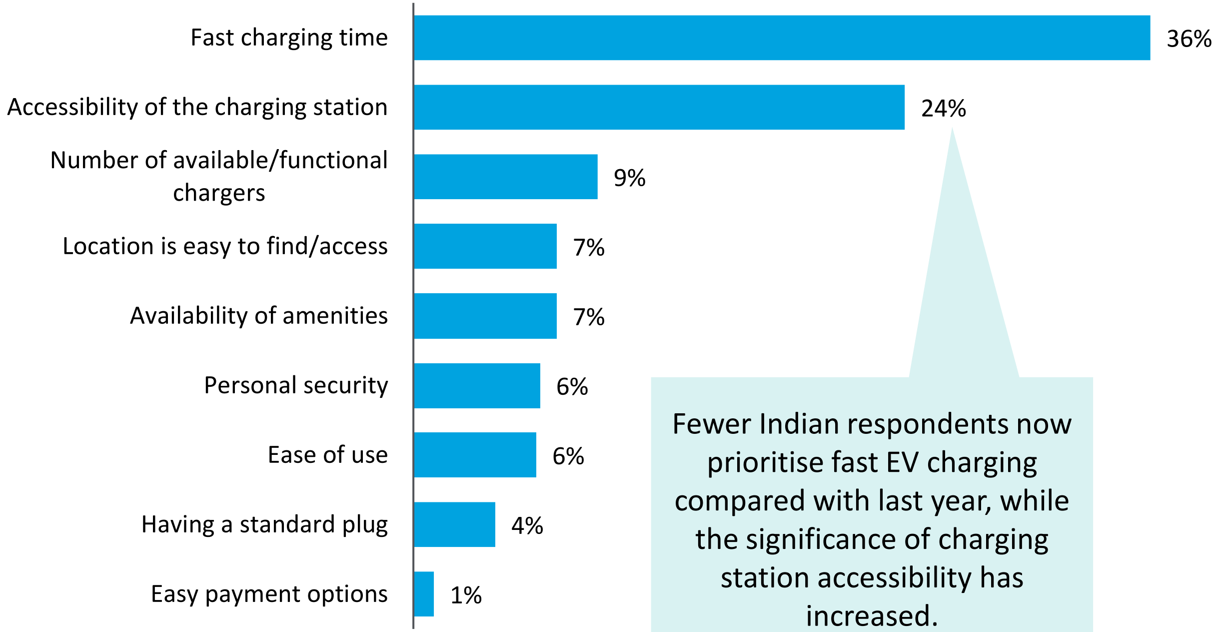
Q18: How many times in the past month have you driven more than 60 miles or 100 kilometres from your home? Q48: Where would you most want to charge your EV when you are away from home?

Sample size: n= 646 [Q18]; 182 [Q43]

Source: Global Automobile Consumer Survey 2025

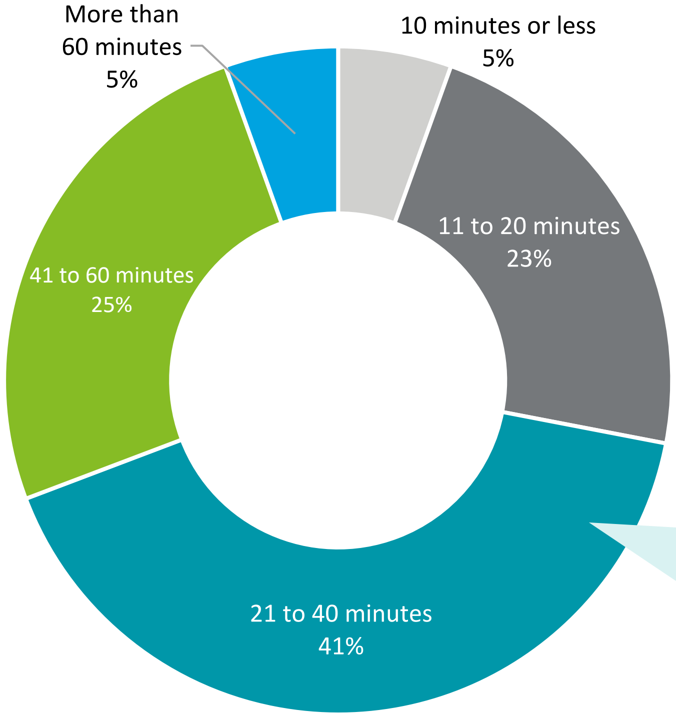
While fast charging is crucial for EV users, 69 percent of Indian customers are comfortable waiting up to 40 minutes, indicating that the push for ultra-fast charge times might be overstated

The most important aspect of an EV charging experience



Fewer Indian respondents now prioritise fast EV charging compared with last year, while the significance of charging station accessibility has increased.

Expected wait time to charge an EV at public charging stations (from empty to 80 percent)



Customers in surveyed markets like the US and China are willing to wait up to 40 minutes to charge

Note: Percentage may not add up to 100 due to rounding.

Q50: What is the most important aspect of an EV charging experience?; Q49: How long do you think it should take to charge an EV from fully discharged to 80% at a public charging location?

Sample size: n = 182 [Q50]; 182 [Q49]

Source: Global Automobile Consumer Survey 2025

About 45 percent of Indian consumers prefer traditional credit/debit cards, but the rise in smartphone app payments highlights a shift towards digital and UPI transactions

Most preferred way to pay for public EV charging

Credit/debit card	45%
Smartphone app	31%
Pre-paid subscription plan	11%
Third-party payment platform	7%
Loyalty points	5%
Other	1%

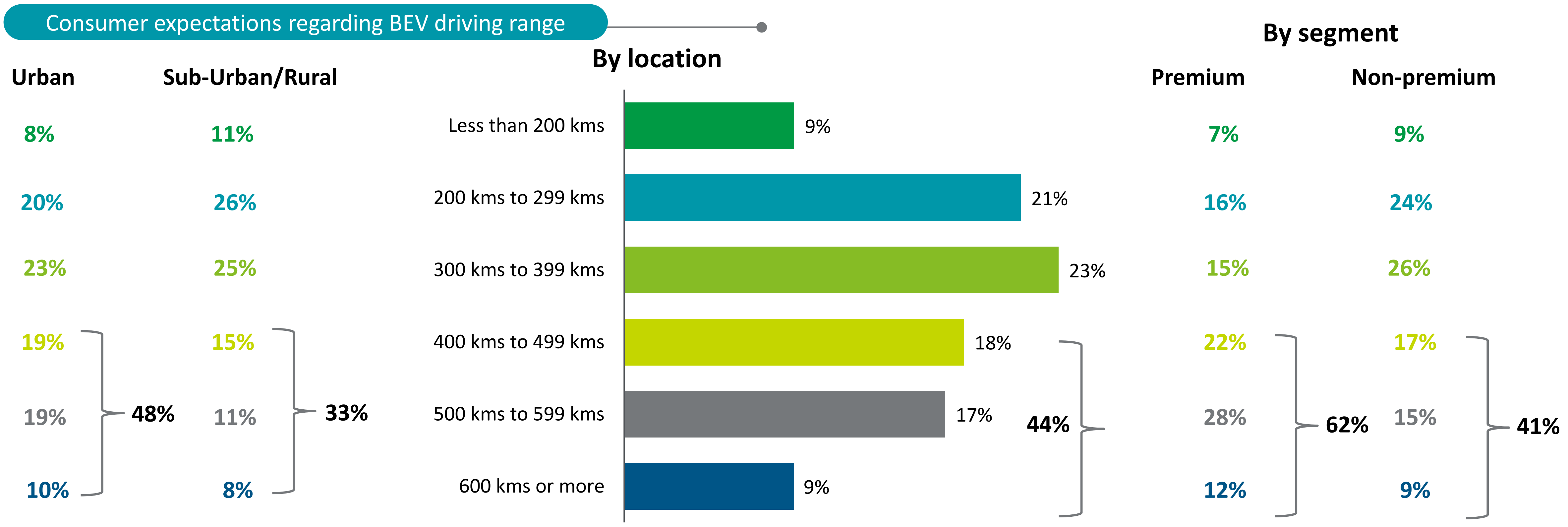
Credit/debit card usage and smartphone app transactions in India have each increased by 3 percent over the past year, with UPI playing a pivotal role in smartphone-based payments.

Q51: How would you most prefer to pay for public EV charging?

Sample size: n= 182

Source: Global Automobile Consumer Survey 2025

About 44 percent of BEV intenders expect a fully charged vehicle to offer a driving range of over 400 km, with higher expectations among urban and premium segment buyers



A greater proportion of respondents, up from 40 percent last year, expect a range exceeding 400 km, driven mainly due to higher expectations among urban customers, while rural expectations remain unchanged.

Note: Did not consider those intenders who stated they would never acquire a BEV irrespective of the driving range.

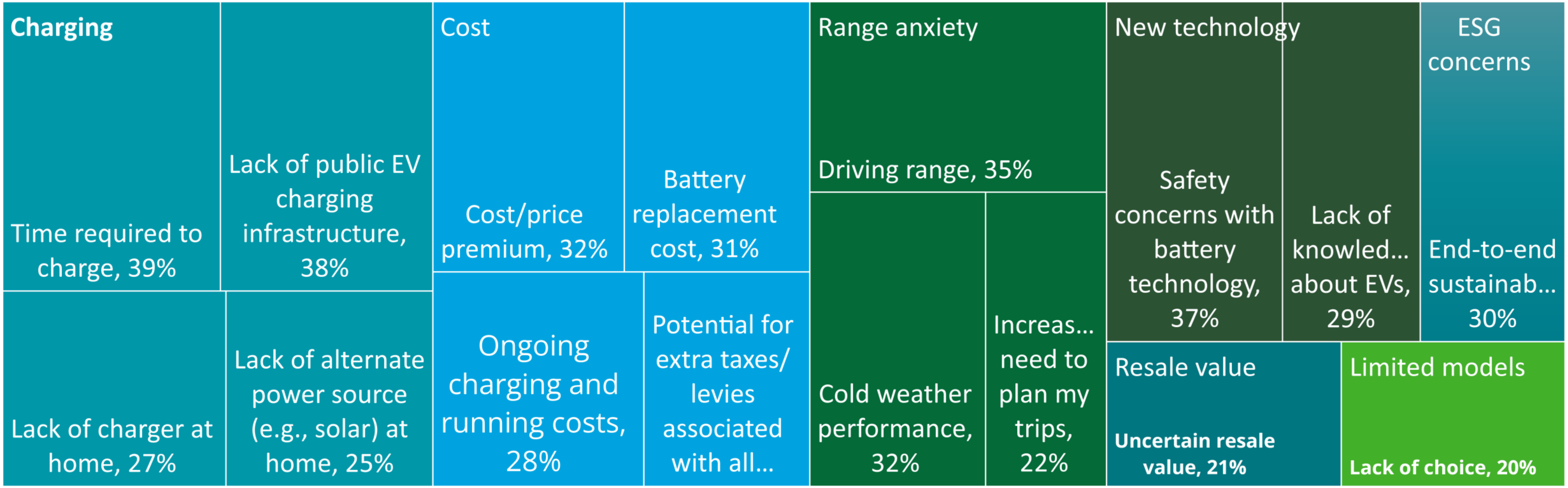
Q53: How far would a fully charged all-battery electric vehicle need to go in order for you to consider acquiring one?

Sample size: n = 809 [Overall]; 626 [Urban], 183 [Sub-urban/Rural], 165 [Premium], 618 [Non-premium]

Source: Global Automobile Consumer Survey 2025

Charging time and infrastructure are key concerns, followed by driving range. Over a third of customers cite vehicle cost and battery replacement as major obstacles, emphasizing the need to address high prices

Concerns regarding all battery-powered EVs



Note: The sum of the percentages exceeds 100 percent as respondents can select multiple options; other values not shown

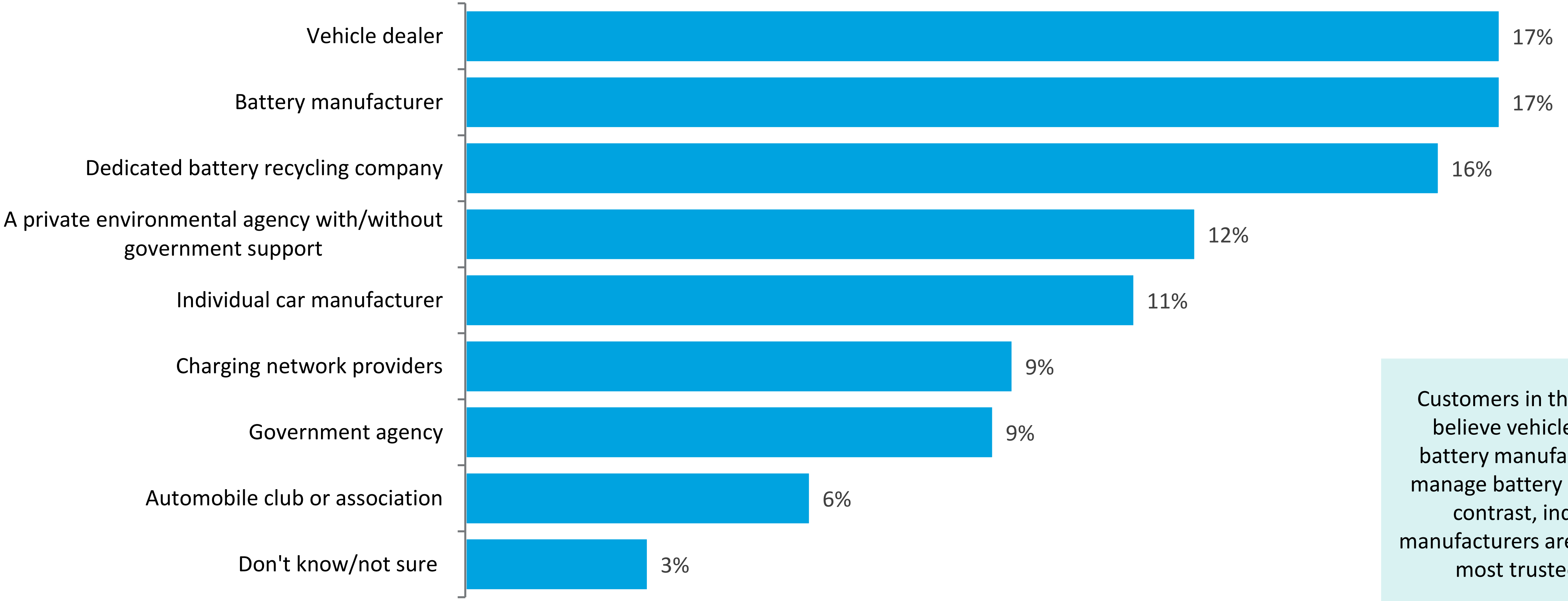
Q52: What are your biggest concerns regarding all battery-powered EVs? Please select all that apply.

Sample size: n= 882

Source: Global Automobile Consumer Survey 2025

Surveyed Indian customers believe vehicle dealers, EV battery manufacturers and battery recycling companies should handle end-of-life EV batteries collection, storage and recycling

Entity that should be responsible for collecting, storing and recycling EV batteries after their end-of-life (percentage of respondents)



Customers in the US and India believe vehicle dealers and battery manufacturers should manage battery stewardship. In contrast, individual car manufacturers are considered the most trusted in Japan.

Q55: Who do you think should be responsible for collecting, storing and recycling electric vehicle batteries after their end-of-life?

Sample size: n= 882

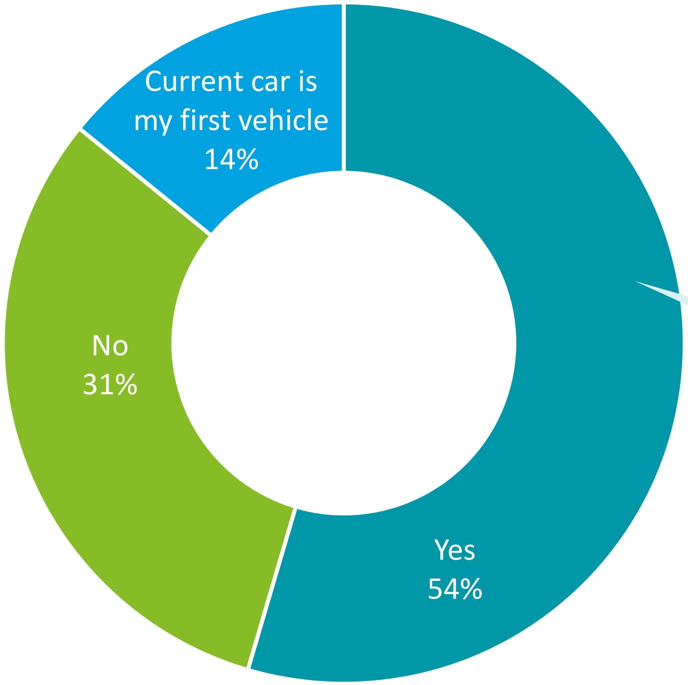
Source: Global Automobile Consumer Survey 2025

2

Future vehicle intentions

The majority of Indian customers are loyal to their vehicle brands, but many are considering switching, emphasizing the need for stronger customer relationships to maintain long-term loyalty

Percentage of consumers whose prior vehicle was from the same brand as current vehicle



About 54 percent of surveyed customers in India own the same brand as their previous vehicle, a trend that is slightly more prevalent in China and Japan.

of Indian customers intend to switch vehicle brands,* marking a decline from 78 percent in the previous year.

*includes switching to a different brand from the same parent or a different brand from a different sales parent

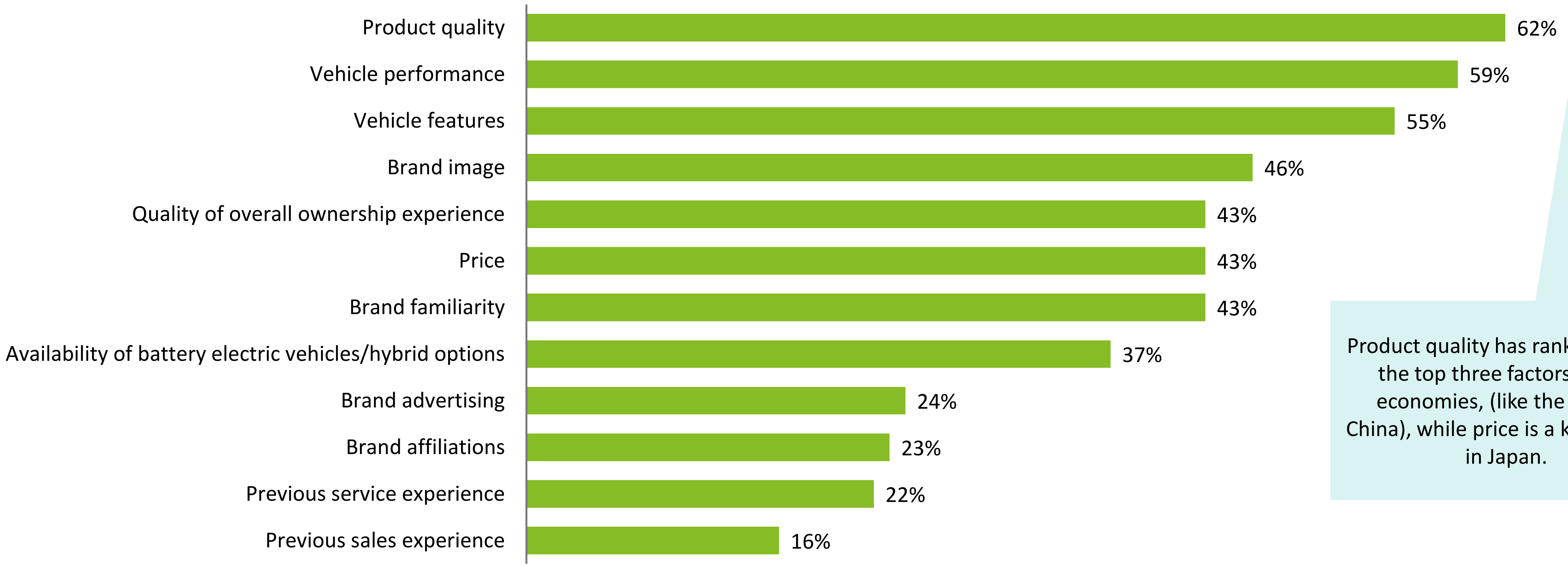
Q6. Was your prior vehicle from the same brand? Q5. What brand is the vehicle you drive most often?; Q26. What brand are you considering most for your next vehicle? [Brand switching percentage is based on a calculation involving these two questions.]

Sample size: n= 646 [Q6]; 633 [Q5, Q26]

Source: Global Automobile Consumer Survey 2025

Product quality (including product safety), vehicle performance and features are the key factors influencing the choice of brand for the next vehicle for Indian customers

Most important factors driving the choice of brand for your next vehicle (by type of engine in next vehicle)



Product quality has ranked among the top three factors across economies, (like the US and China), while price is a key priority in Japan.

Note: The sum of the percentages exceeds 100 percent, as respondents can select multiple options.

Q29. What are the most important factors driving the choice of brand for your next vehicle? (Please select all that apply).

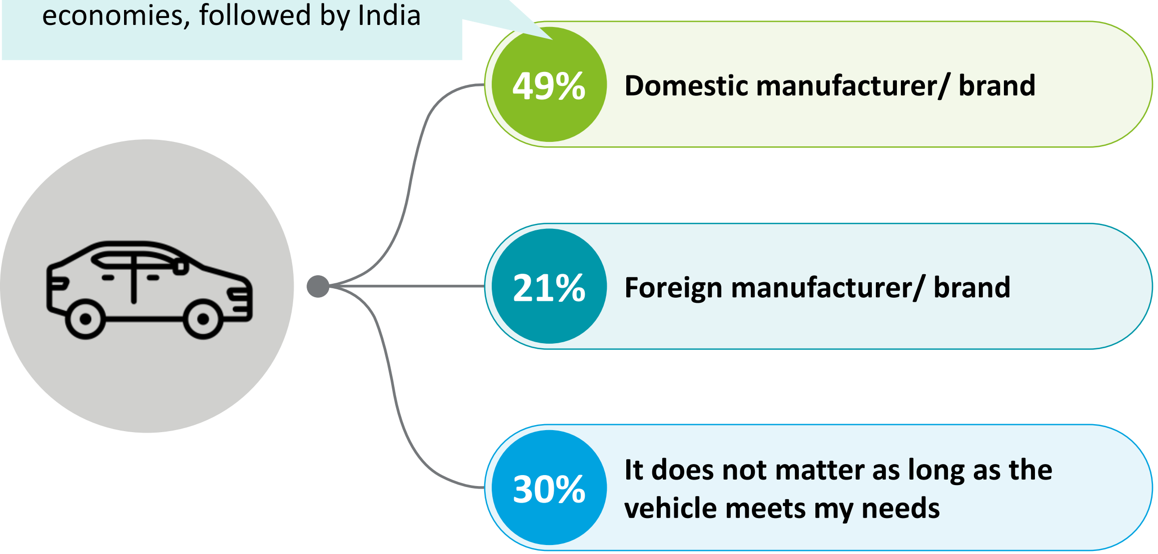
Sample size: n= 882

Source: Global Automobile Consumer Survey 2025

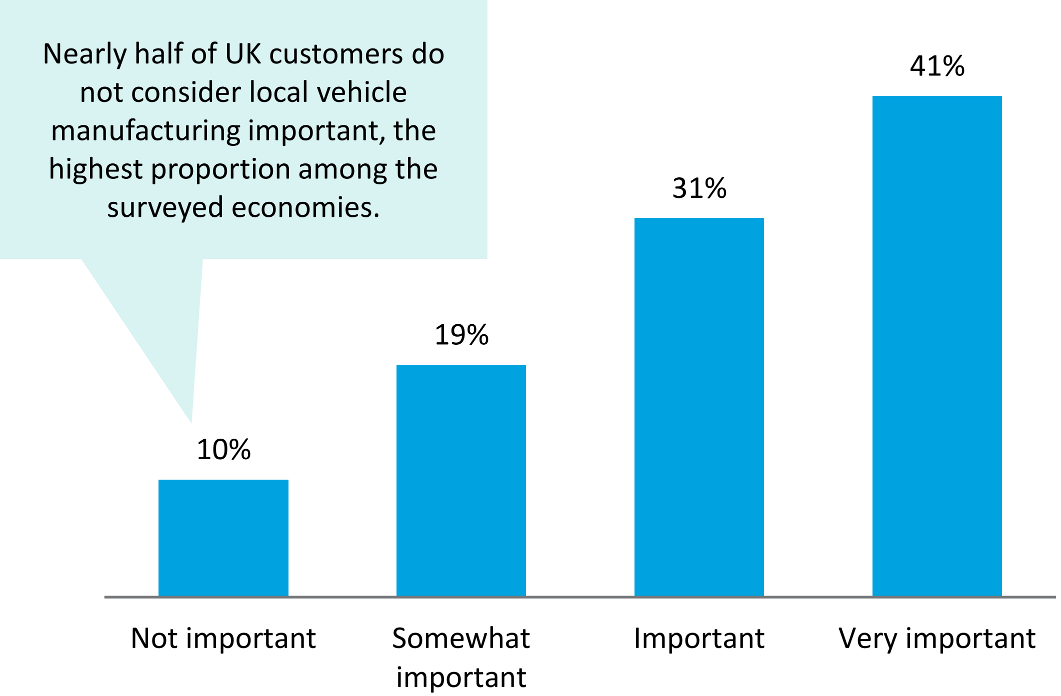
Nearly half of the surveyed customers (49 percent) prefer domestic brands, with 72 percent prioritising local manufacturing in vehicle production, highlighting strong support for homegrown products

Preferred organisations for next vehicle purchase

Three-fourths of surveyed customers in Japan prefer domestic manufacturers, the highest among all surveyed economies, followed by India



Percentage of consumers who give importance to local vehicle manufacturing (i.e., manufactured in your country or region)



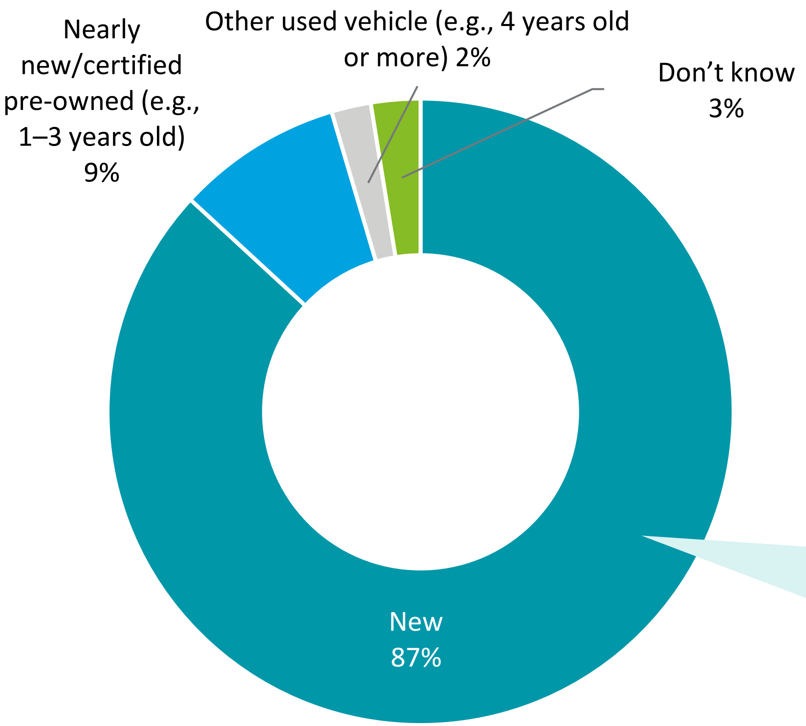
Q54: From which of the following types of organisations are you most interested in acquiring your next vehicle?; Q31: To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your country or region)?

Sample size: n= 882 [Q54]; 882 [Q31]

Source: [Global Automobile Consumer Survey 2025]

About 87 percent of vehicle owners in India plan to buy new vehicles, with used buyers preferring models under three years old. Customers prioritise brands focused on sustainability

Next vehicle type by current vehicle type



This year, 9 percent of surveyed users chose nearly new vehicles. In contrast, 96 percent opted for new vehicles last year, while only 2 percent chose old ones.

Percentage of consumers who would give importance to vehicle brands that have a strong commitment to sustainable practices

The proportion of people who believe vehicle brands demonstrate a strong commitment to sustainable practices remains unchanged

Very important
56%

Important
30%

Somewhat important
12%

Not important
56%

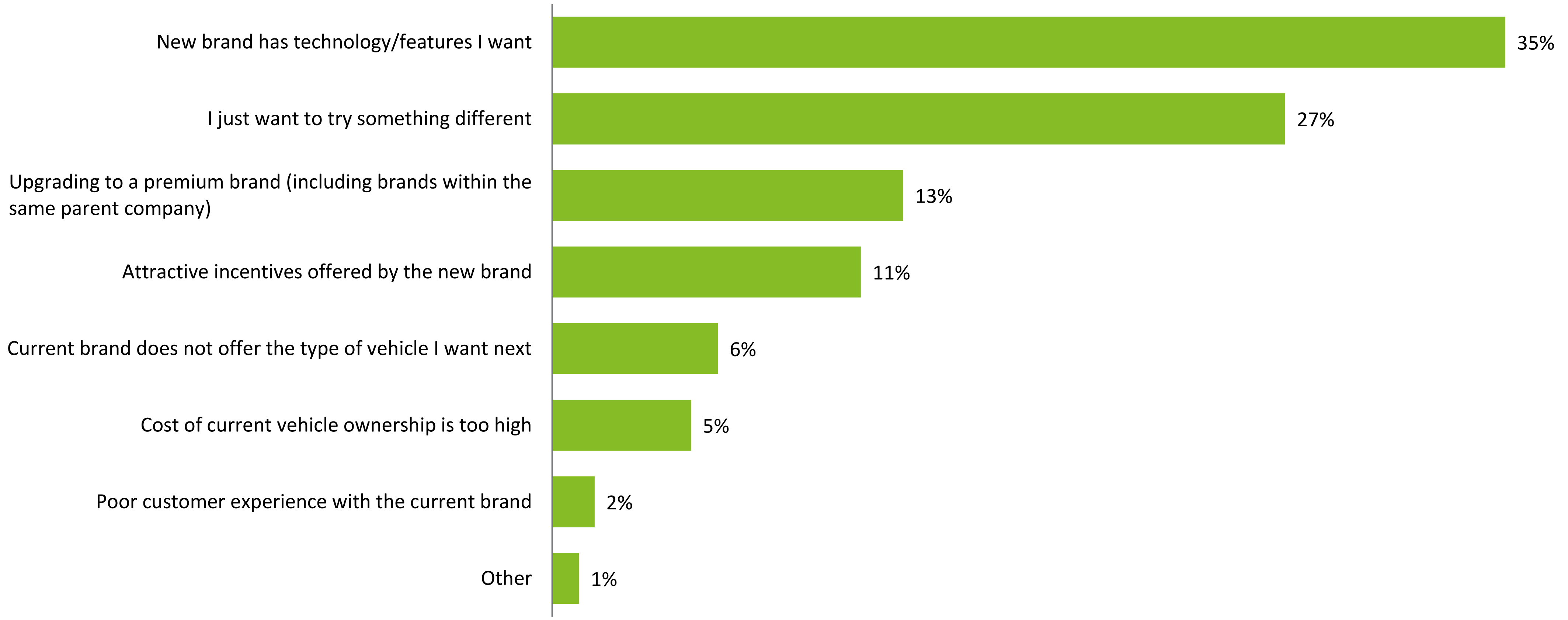
Q24. Will your next vehicle be new or used? Q30: When thinking about choosing your next vehicle, how important will it be for a vehicle brand to have a strong commitment to sustainable practices (e.g., low carbon manufacturing footprint, use of environmentally friendly materials, electrification strategy)?

Sample size: n = 981 [Q24]; 882 [Q30]

Source: [Global Automobile Consumer Survey 2025]

About 62 percent of Indian customers seek to switch vehicle brands, driven by new features and a desire for fresh experiences

Key reasons for switching to another brand of vehicle

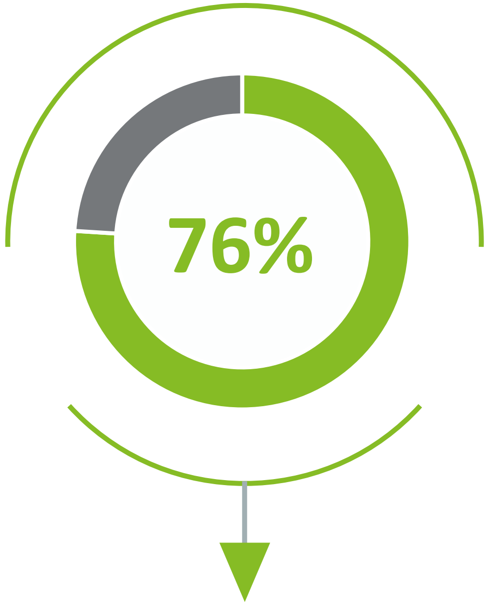


Q28. What is the main reason you plan to switch to another vehicle brand?

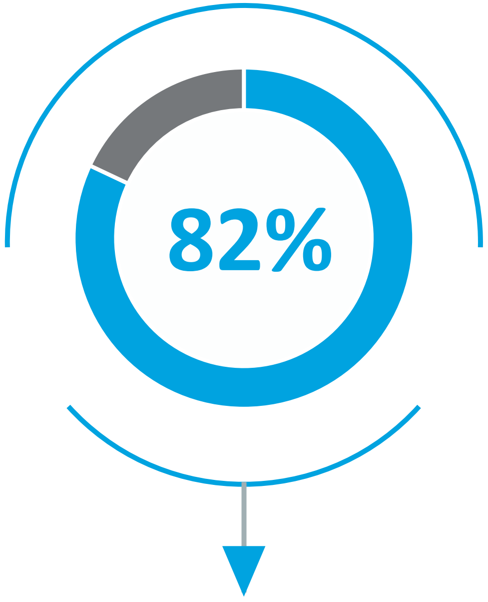
Sample size: n = 705 [Q28];

Source: [Global Automobile Consumer Survey 2025]

Indian customers are increasingly interested in buying vehicles and insurance directly from manufacturers as OEMs adopt 'agency' retail models, indicating a growing acceptance of this direct-to-consumer approach



of Indian customers are interested in purchasing vehicles directly from manufacturers, the highest among surveyed economies, followed by China.



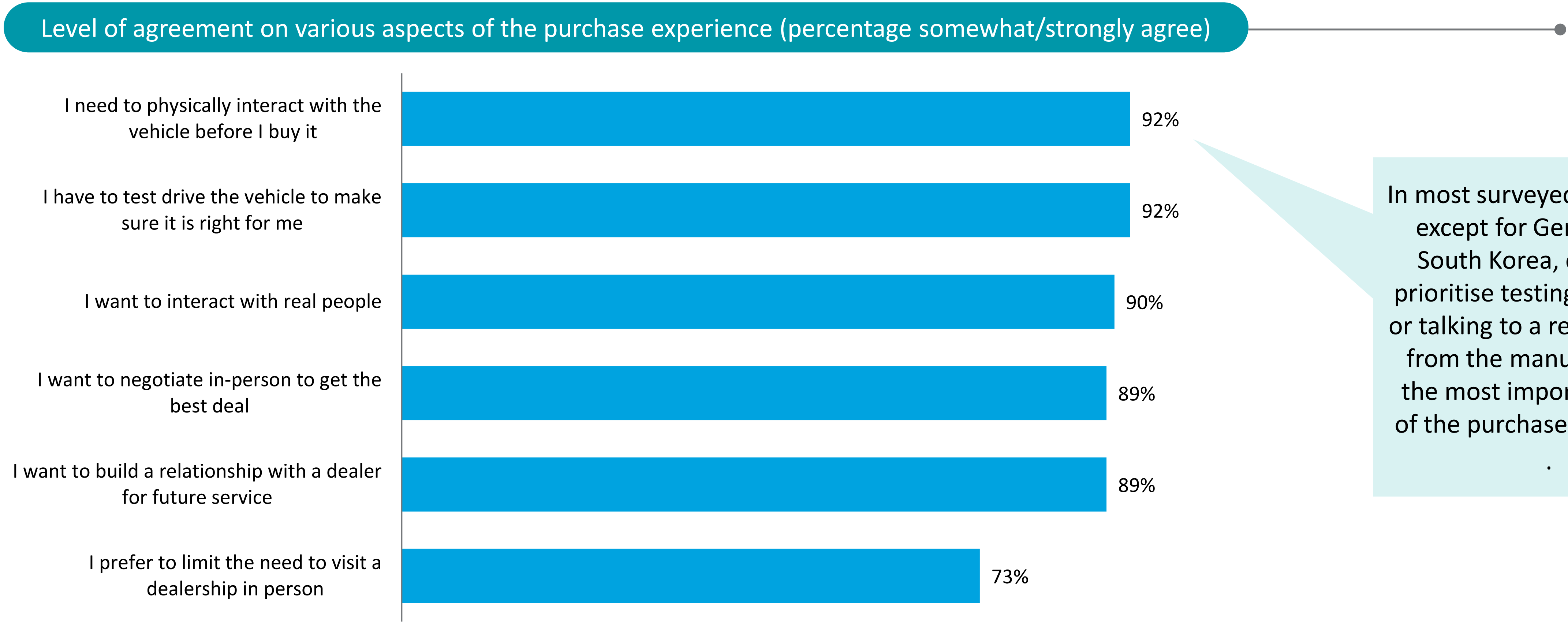
8 out of 10 Indian customers are interested in purchasing insurance directly from the manufacturer, the highest among surveyed economies, followed by China

Q61: To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)? Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?

Sample size: 882 [Q61]; 882 [Q60]

Source: Global Automobile Consumer Survey 2025

Transitioning to a fully online vehicle purchase process in India may be challenging, as most of the surveyed customers prefer a physical interaction before making a purchase



In most surveyed economies, except for Germany and South Korea, customers prioritise testing the vehicle or talking to a representative from the manufacturer as the most important aspect of the purchase experience.

Note: The sum of the percentages exceeds 100 percent as respondents can select multiple options.

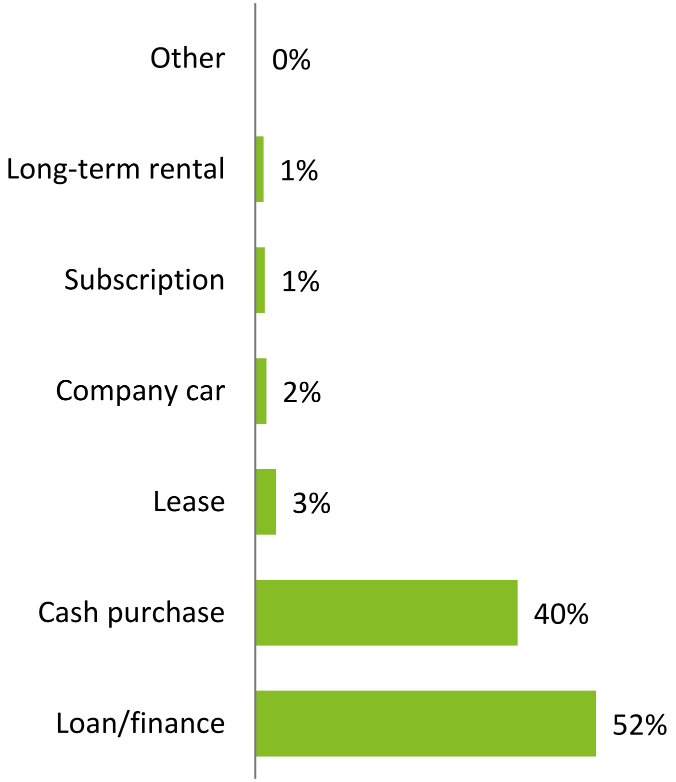
Q40: Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?

Sample size: n= 882

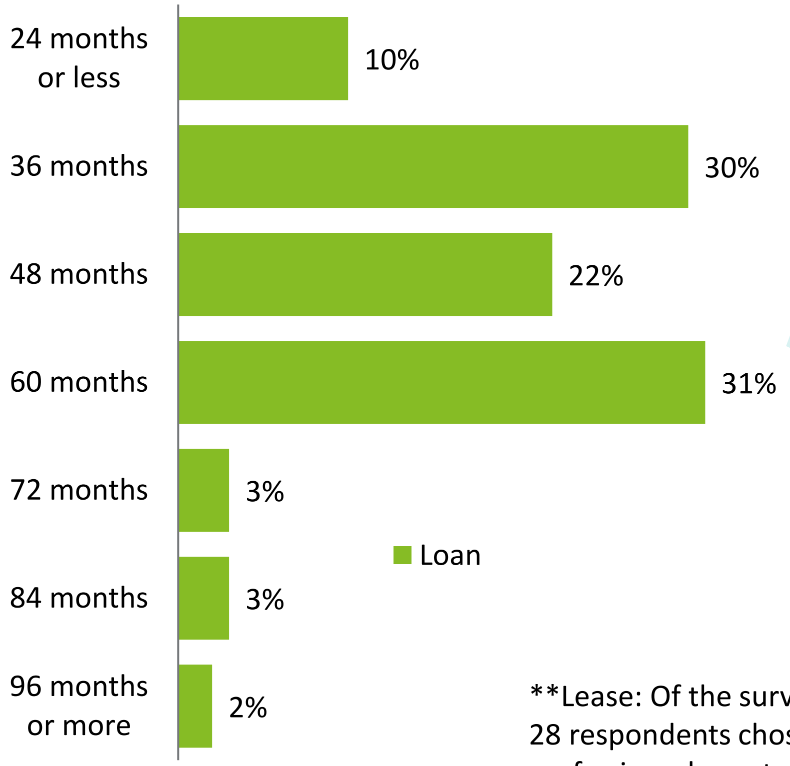
Source: [Global Automobile Consumer Survey 2025]

About 55 percent of customers in India plan to finance their next vehicle through a loan or lease, but their preferred term durations may not match market realities, as extended terms keep monthly payments affordable

Preferred intention of acquiring new vehicle



Preferred loan and lease** duration



Similar to last year, nearly the same proportion of Indian customers prefer taking a loan with a tenure of four years or less.

**Lease: Of the surveyed population, only 28 respondents chose leasing, with 20 preferring a lease term under 48 months

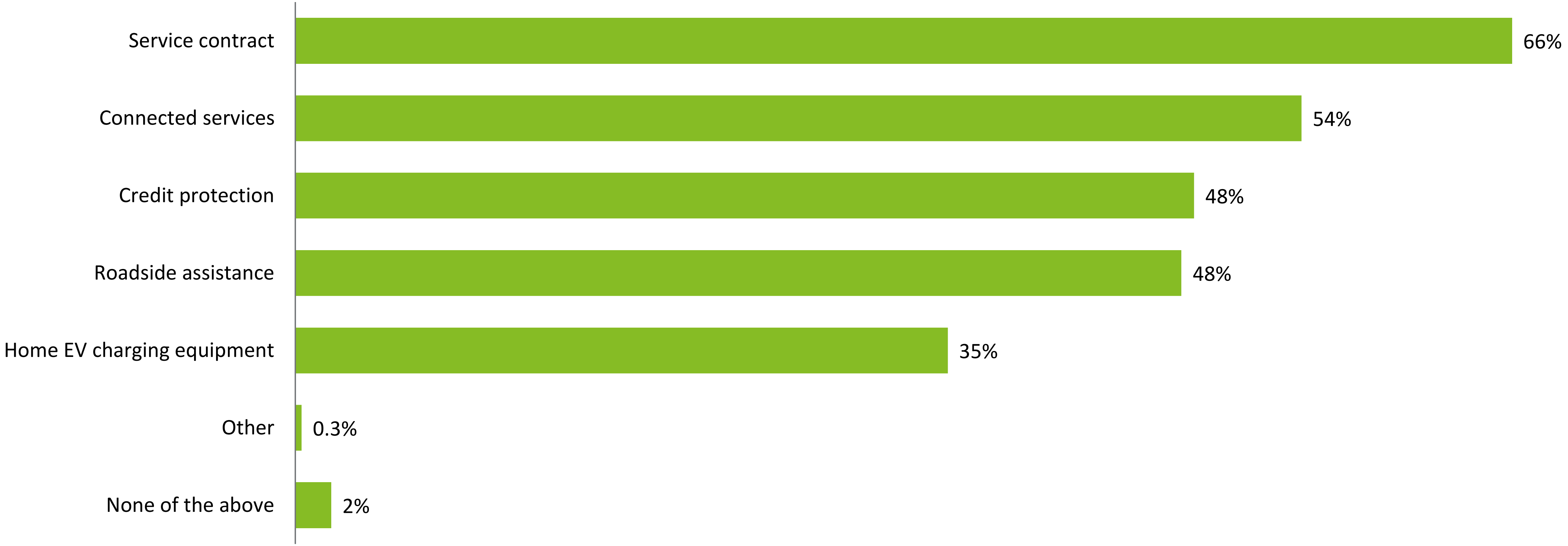
Q34. How do you intend to acquire your next vehicle?; Q35. What is your preferred loan duration (in months)?; Q36. What is your preferred lease duration (in months)?

Sample size: n= 882 [Q34]; 460 [Q35]; 28 [Q36]

Source: Global Automobile Consumer Survey 2025

When acquiring their next vehicle, Indian customers now prioritise offerings such as vehicle maintenance contracts, connected entertainment features and credit protection over traditional vehicle insurance

Key additional services consumers plan to purchase or subscribe to when acquiring their next vehicle



Note: The sum of the percentages exceeds 100 percent as respondents can select multiple options.

Q37: Which of the following additional services do you plan to purchase, or subscribe to, when acquiring your next vehicle? Please select all that apply.?

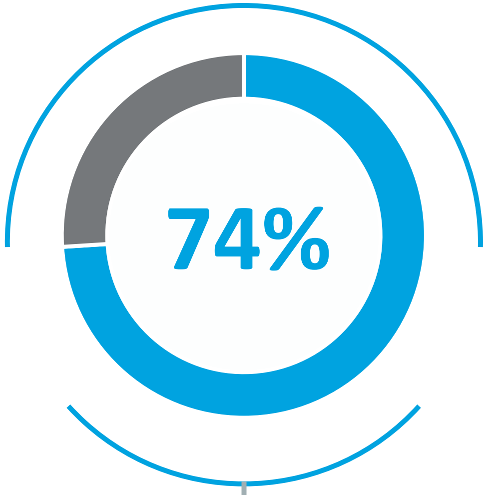
Sample size: n= 882

Source: [Global Automobile Consumer Survey 2025]

3 Connectivity

Many respondents in India are concerned about fully autonomous robotaxi services and commercial vehicles operating autonomously on highways

of customers in India are concerned about fully autonomous robotaxi services operating in their area—the highest among the surveyed economies, followed by the UK at 52 percent



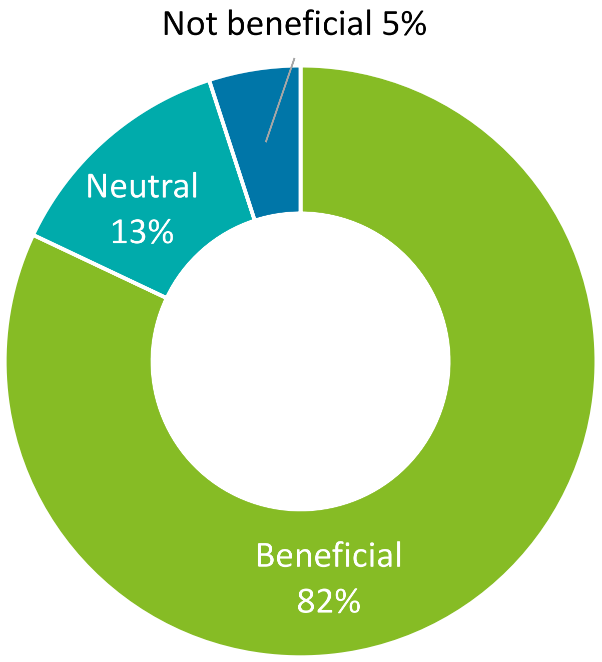
of customers in India are concerned about commercial vehicles operating in fully autonomous mode on highways—the highest among the surveyed economies—followed by the UK at 67%.

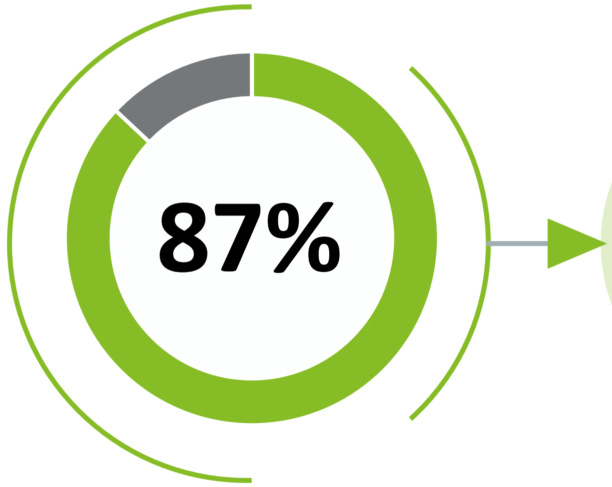
Q56. To what extent are you concerned with each of the following scenarios?

Source: [Global Automobile Consumer Survey 2025]

Indian customers are optimistic about tech, with 82 percent viewing AI as beneficial, and they prioritise vehicle-smartphone connectivity

AI integration in vehicle systems





of customers in India consider vehicle connectivity with smartphones to be somewhat or very important—the highest among the surveyed economies, followed by China at 80 percent.

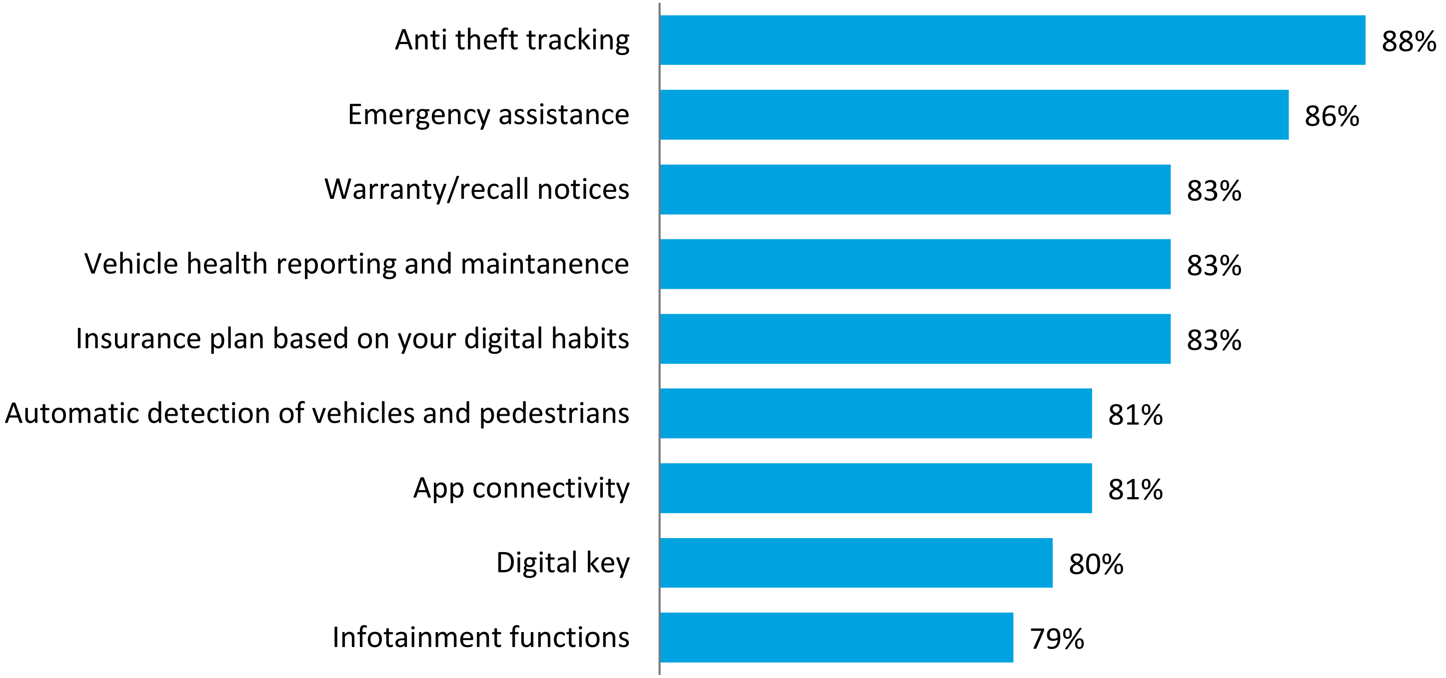
Q62: To what extent do you think the addition of artificial intelligence in vehicle systems (e.g., voice activated features, autonomous driving) will be beneficial? Q58. How important will it be for your next vehicle to connect with your smartphone via Apple CarPlay or Android Auto?

Sample size: n= 882 [Q62]; 882 [Q58]

Source: Global Automobile Consumer Survey 2025

Indian consumers are willing to share their PII* and pay extra for updates related to anti-theft tracking, emergency assistance and warranty/recall notices

Readiness to pay extra for features even if it requires sharing PII* and/or vehicle data



Anti-theft tracking is among the top three preferred connected services in China, Japan and US

*personally identifiable information.

Note: The sum of the percentages exceeds 100 percent as respondents can select multiple options.

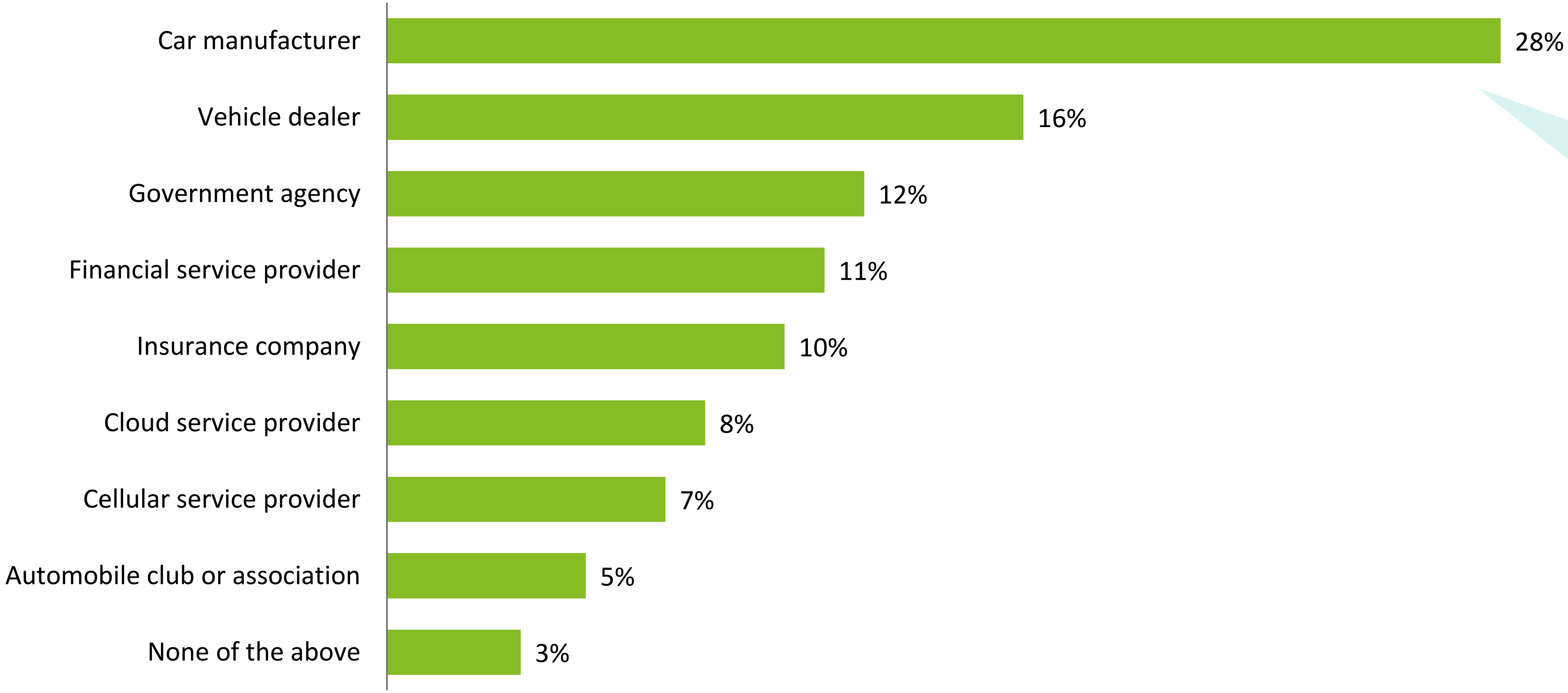
Q57: To what extent would you be willing to pay extra for each of the following connected vehicle services?

Sample size: n= 882

Source: [Global Automobile Consumer Survey 2025]

About 44 percent of Indian customers place their highest trust in either OEMs or their dealers for managing the data collected from vehicles

Consumer opinions on whom they trust the most to manage data generated/collected by their vehicle



OEMs and vehicle dealers remain the most trusted entities for accessing vehicle-generated data, while trust in insurance companies has declined from last year

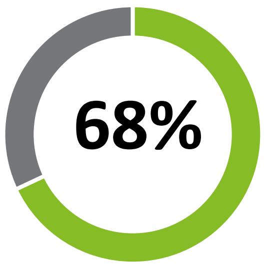
Q59: In a scenario where you owned a connected vehicle, who would you trust most with access to the data your vehicle generates?

Sample size: n= 882

Source: Global Automobile Consumer Survey 2025

4 Mobility as a Service (MaaS)

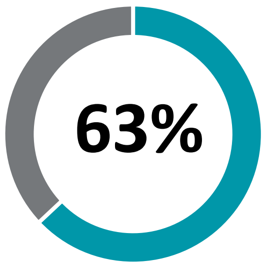
Despite high vehicle usage, many younger customers in India are open to giving up ownership for MaaS or subscription models due to financial concerns



of customers (71 percent for urban, 58 percent for suburban/rural) are willing to give up vehicle ownership in favour of a fully available MaaS solution going forward

Interest in MaaS as primary transport	
18–34	**70%**
35–54	**69%**
55 or above	**63%**

The proportion of Indian customers willing to adopt MaaS as their primary mode of transport has declined from 82 percent recorded in the previous year.



of customers are interested in giving up vehicle ownership in favour of subscribing to the use of a vehicle going forward.

Interest in vehicle subscription	
18–34	**66%**
35–54	**64%**
55 or above	**55%**

A slightly higher proportion of younger adults, compared with other age groups in India, are willing to give up vehicle ownership in favour of a subscription model

Q63: To what extent would you be willing to give up vehicle ownership in favour of a fully available mobility-as-a-service (MaaS) solution going forward? Q69: To what extent are you interested in giving up vehicle ownership in favour of subscribing to the use of a vehicle going forward?

Sample size: n= 404 [Q63]; 404 [Q69]

Source: Global Automobile Consumer Survey 2025

Nearly two-thirds of customers expect to pay less than INR30,000 per month for their next vehicle, slightly lower than last year, indicating a growing premiumisation potential

Consumer expectation regarding monthly vehicle payment

Monthly vehicle payment/subscription	Overall
Less than INR10,000	22%
INR10,000 to less than INR20,000	27%
INR20,000 to less than INR30,000	19%
INR30,000 to less than INR40,000	12%
INR40,000 to less than INR50,000	10%
INR50,000 or more	10%

The proportion of respondents preferring to pay less than INR30,000 has declined from 73 percent to 68 percent this year.

Q39 How much do you intend to spend on a monthly vehicle payment/subscription (including all bundled products and services)?

Sample size: n= 882

Source: Global Automobile Consumer Survey 2025

5 About the study

About the study

Survey timing

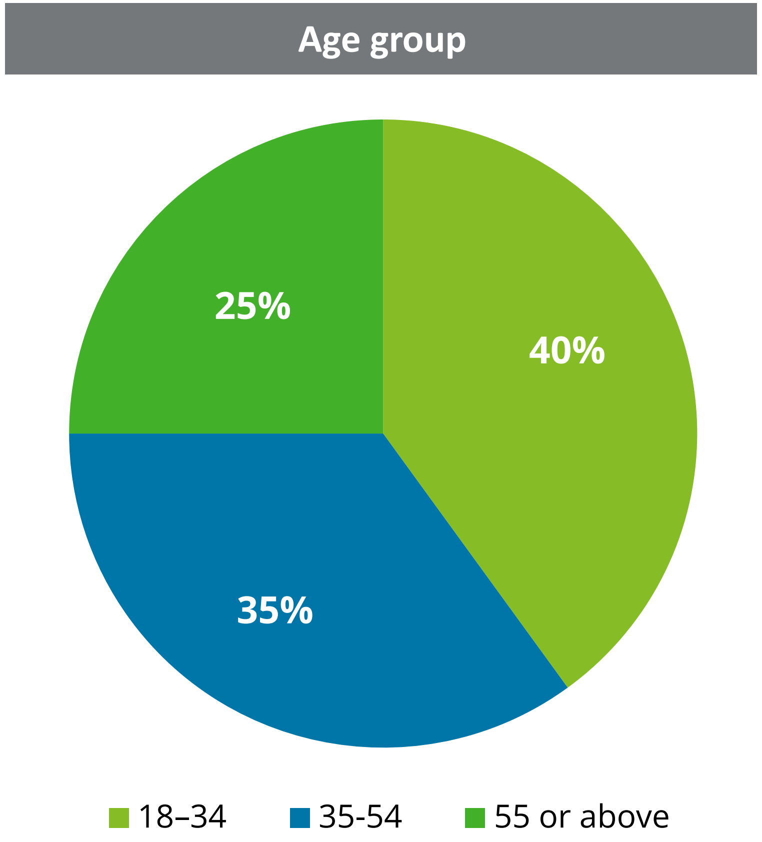
October to December 2024

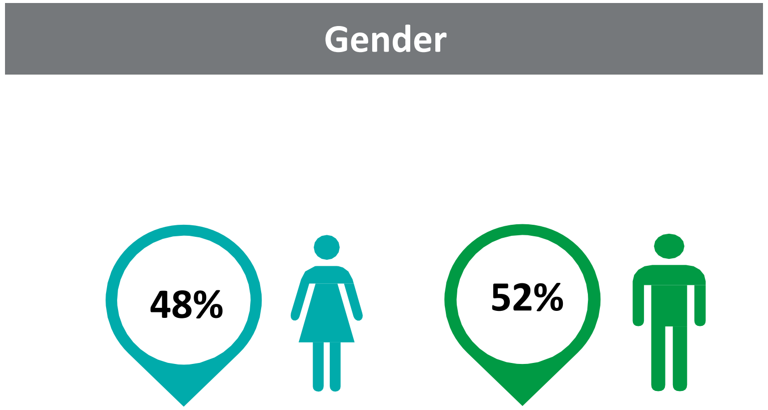
Sample

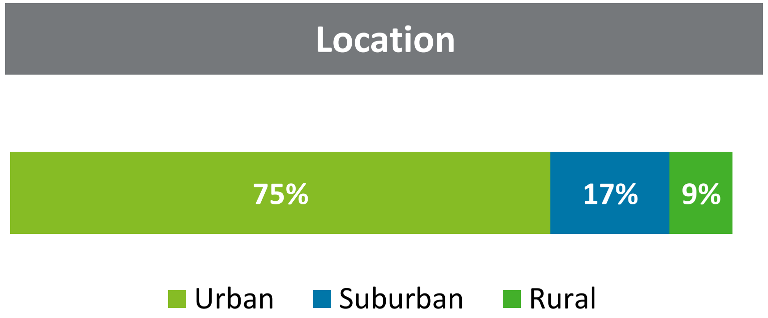
The survey polled a sample of 1,000 consumers in India. The survey has a margin of error for the entire sample of +/- 3.1 percent.

Methodology

The study uses an online panel methodology. Consumers of driving age are invited to complete the questionnaire via email.







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