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Together makes progress

2026 Global Automotive Consumer Study

Key findings: global focus markets

January 2026

Dear reader,

The global automotive industry is moving through one of the most transformative periods in its history. While innovation across the value chain continues to accelerate, the industry's center of gravity remains the consumer—whose expectations around value, access, and experience are changing. Consumers are becoming more value-driven, seeking fairness, trust, and transparency alongside quality and innovation. Rising vehicle prices and higher financing costs have brought affordability to the forefront, prompting many to reconsider what defines value in mobility and what they expect from vehicle brands.

The global transition toward zero-emission mobility remains a defining industry priority, yet the regional policy landscape is evolving in complex ways. The withdrawal of purchase incentives, more flexible emissions targets, and rising trade barriers in the US are influencing both pricing and production strategies. Automakers are responding by expanding hybrid portfolios, refining internal-combustion offerings, and localizing manufacturing to balance regulatory shifts with consumer access and affordability. In Europe and Asia, manufacturers are reimagining the path to sustainability by developing alternative mobility models rooted in more affordable, "greener" vehicles that can bring the energy transition within reach for a broader base of consumers.

The rise of software-defined vehicles is helping to reshape many aspects of the value chain, turning cars into intelligent, connected platforms that continue to evolve long after purchase. Regular over-the-air updates are helping extend vehicle lifespans and enhance ownership experiences, giving consumers new reasons to keep vehicles longer while staying current with technology. Connectivity, meanwhile, remains central to this transformation—linking vehicles, services, and ecosystems in ways that redefine the mobility experience.

These shifts are unfolding amid an environment of trade complexity, economic recalibration, and supply chain localization. In this context, collaboration, adaptability, and transparency are becoming an increasingly important factor to maintain resilience, profitability, and consumer trust.

For more than a decade, Deloitte's Global Automotive Consumer Study has served as a lens through which to view this rapidly evolving landscape. This year's edition continues that tradition, drawing on insights from more than 28,500 consumers across 27 key automotive markets worldwide. The findings explore how consumer attitudes toward electrification, brand loyalty, connectivity, and digital experiences are shaping the future of mobility.

This report focuses on eight of the largest global auto markets, presenting key insights in five sections, covering electric vehicle adoption, future buying intentions, connectivity, software-defined vehicles, and servicing behavior. For more information, including a deeper dive of study results for participating countries, please click here to access the online interactive dashboard.

We hope you find the insights contained in this report useful and informative.

Warm regards,

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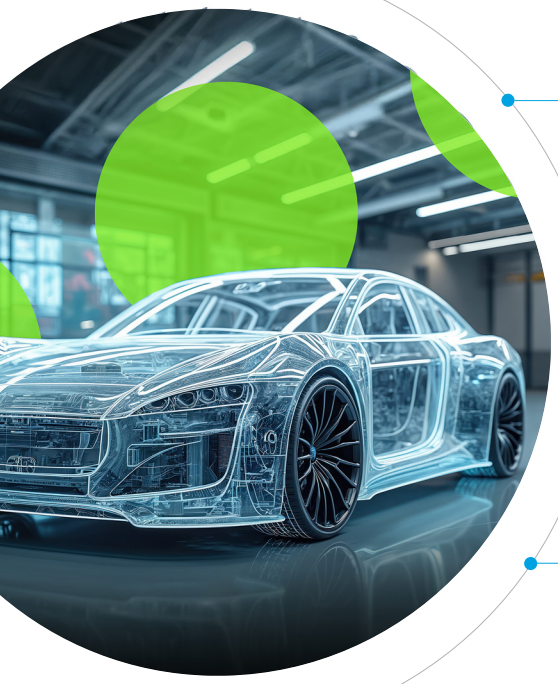
Deloitte has been exploring key consumer trends impacting a rapidly evolving global mobility ecosystem for over a decade.

Key themes emerging over the years include:

- **2010** • Overall value ranked as the primary factor when evaluating brands
- **2011** • "Cockpit technology" and the shopping experience-led differentiators
- **2012** • Interest in hybrids driven by cost and convenience, while interest in connectivity centers on safety
- **2014** • Shared mobility emerges as an alternative to owning a vehicle
- **2017** • Interest in full autonomy grows, but consumers want a track record of safety
- **2018** • Consumers in many global markets continue to move away from internal combustion engines (ICE)
- **2019** • Consumers "pump the brakes" on interest in autonomous vehicles
- **2020** • Questions remain regarding consumers' willingness to pay for advanced technologies
- **2021** • Online sales gaining traction, but majority of consumers still want in-person purchase experience
- **2022** • Interest in electrified vehicles (EVs) grows, but worries about price, driving range, and charging time remain
- **2023** • The shift to EVs is primarily based on a strong consumer perception that it will significantly reduce vehicle operating costs
- **2024** • Consumer interest in EVs wanes in most markets due to high sticker prices, range anxiety, and charging infrastructure challenges
- **2025** • Rapidly changing trade and environmental policy landscape in some markets causing a shift in both manufacturer strategy and consumer expectations

Contents

Key findings



1. **Global battery electric vehicle (BEV) demand appears uneven across regions, while interest in hybrids continues to strengthen as consumers balance affordability, charging access, and everyday practicality.**

   Lower fuel costs remain a key motivator for consumers considering electrified options, yet concerns around driving range, charging time, public-charging availability, and battery performance continue to shape adoption. Most EV intenders prefer to charge at home while cost remains an important factor in public-charging decisions. At the same time, uncertainty around who should manage end-of-life batteries signals broader ecosystem gaps that should be addressed as electrification scales.

2. **Brand loyalty continues to shift, with strong retention in Japan and greater intended brand switching in markets with many first-time owners.**

   Consumers in China, India, and Southeast Asia show the highest switching intent, emphasizing the need for original equipment manufacturers (OEMs) to compete on product quality, performance, and value. Across markets, dealer visits and manufacturer websites remain the most used research sources, and getting a good deal, transparent pricing, and physically experiencing the vehicle continue to play a central role in purchase decisions.

3. **Consumers place the greatest value on connected features that enhance safety and security, while concerns about data-sharing remain high.**

   Emergency assistance, pedestrian detection, and anti-theft tracking draw the strongest willingness to pay, whereas data from synced devices, in-cabin cameras, and vehicle location raise the most concern, highlighting the need for greater trust and transparency in connected services.

4. **Many consumers are open to artificial intelligence (AI)-driven personalization and over-the-air (OTA)-enabled enhancements that extend a vehicle's usefulness over time.**

   Consumers in most markets view software-defined vehicles (SDVs) as valuable, particularly when ongoing OTA updates can add features, improve safety, or boost performance. Many are willing to use AI-enabled customization that adapts settings automatically, and a large share would keep vehicles longer if updates continued throughout ownership, positioning software as a key lever for enhancing loyalty and expanding software-based revenue opportunities.

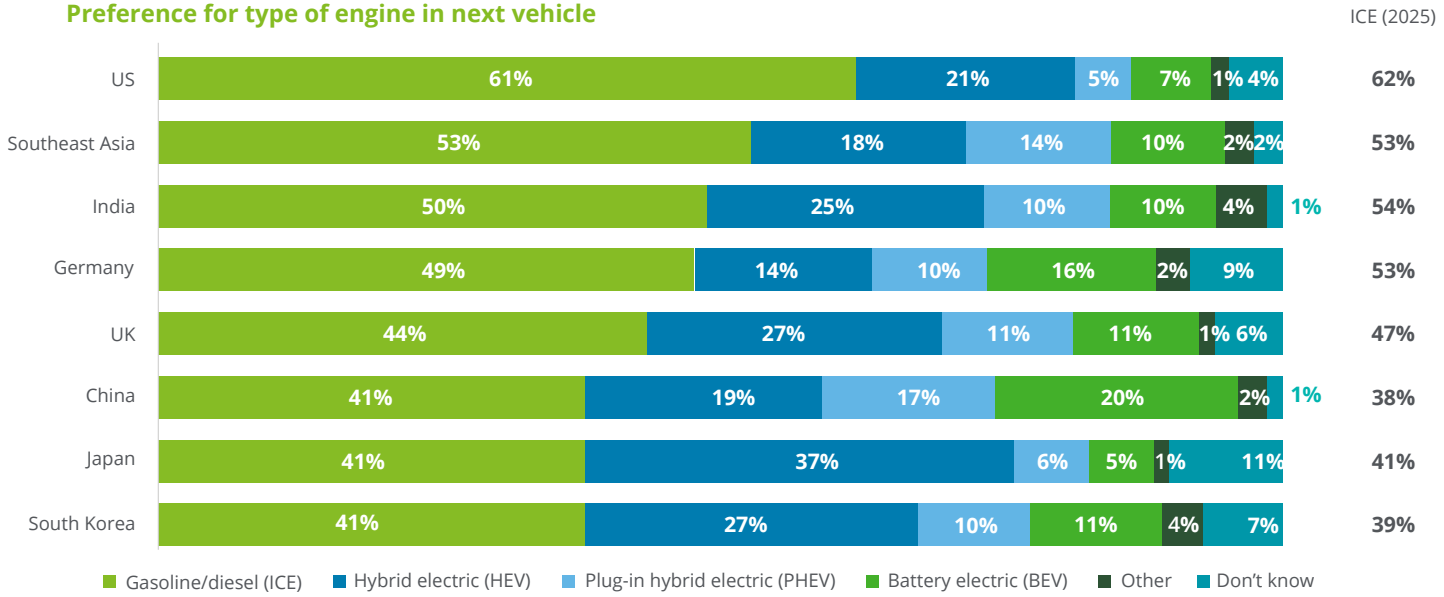
5. **Consumers prioritize service quality, trust, and transparency when choosing and evaluating vehicle service providers.**

   Authorized dealers remain the most common service destination, though independents hold a strong presence in some markets. Quality of work and trust are the primary reasons for choosing a provider, while clear explanations of pricing and the work performed define the service experience.

1 Vehicle electrification

While a majority of US survey respondents continue to prefer ICE vehicles, increased availability of EVs in India, Germany, and the UK are prompting more consumers to pursue an electrified mobility future. The Chinese market continues to evolve as ICE and hybrid options remain relevant for many consumers.

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; percentages may not add up to 100 due to rounding.
Q41. What type of engine would you prefer in your next vehicle?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Lower fuel cost remains one of the top reasons survey respondents cite for wanting an electrified vehicle the next time they are in-market, signaling a strong desire to mitigate long-standing concerns around total cost of ownership.

Top reasons to choose an EV as next vehicle

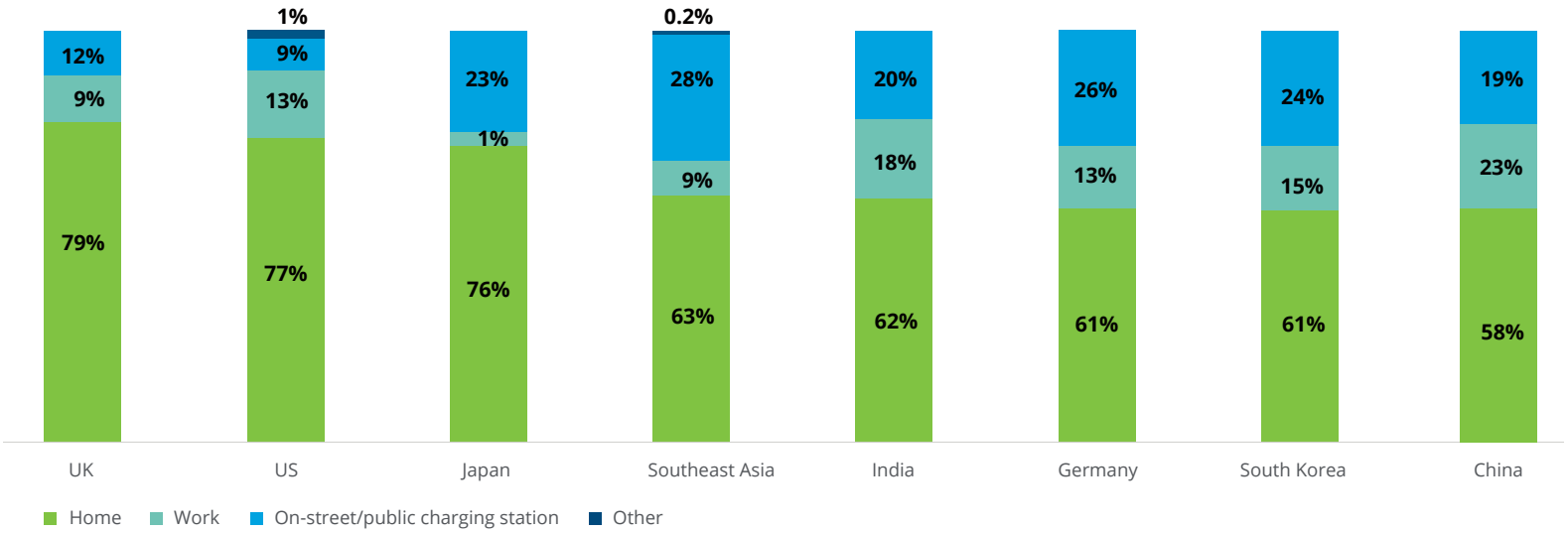
Factors	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Concern for the environment	23%	**41%**	**43%**	25%	**35%**	38%	**39%**	**38%**
Concern about personal health	23%	15%	33%	10%	16%	25%	15%	12%
Lower fuel costs	32%	**39%**	**47%**	**47%**	**55%**	**51%**	**50%**	**52%**
Less maintenance	13%	22%	35%	15%	**34%**	37%	28%	28%
Ability to use the vehicle as a backup battery/ power source	21%	15%	34%	24%	15%	29%	13%	17%
Peer pressure	8%	2%	9%	2%	5%	6%	4%	3%
Better lifestyle experience beyond driving	**34%**	14%	**49%**	17%	23%	37%	22%	26%
Driving experience	**36%**	26%	**43%**	26%	32%	**43%**	**34%**	**30%**
Government incentives/subsidies/stimulus programs	27%	**33%**	33%	25%	32%	31%	21%	19%
Potential for extra taxes/levies applied to internal combustion engine vehicles	18%	17%	27%	4%	16%	20%	16%	13%
Potential ban on sale of new internal combustion engine vehicles	15%	20%	23%	6%	11%	16%	19%	9%
Availability of charging stations	30%	28%	38%	**33%**	18%	**43%**	26%	27%
Faster charging speed	**37%**	26%	**43%**	31%	26%	**42%**	26%	26%
Longer range	**37%**	28%	28%	**34%**	28%	32%	21%	28%
Better resale value	15%	10%	26%	13%	9%	21%	15%	12%
Brand reputation	24%	12%	35%	17%	17%	34%	20%	22%
Brand image	22%	9%	29%	16%	15%	25%	13%	10%

Top reasons

Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? Please select all that apply.
Sample size: n= 476 [China]; 505 [Germany]; 601 [India]; 325 [Japan]; 441 [South Korea]; 2,204 [Southeast Asia]; 676 [UK]; 313 [US]

A majority of global survey respondents intending to acquire a battery electric (BEV) or plug-in hybrid (PHEV) as their next vehicle expect to charge it at home, suggesting an opportunity for stakeholders to further refine plans to build public charging with a focus on maximizing return on invested capital (ROIC).

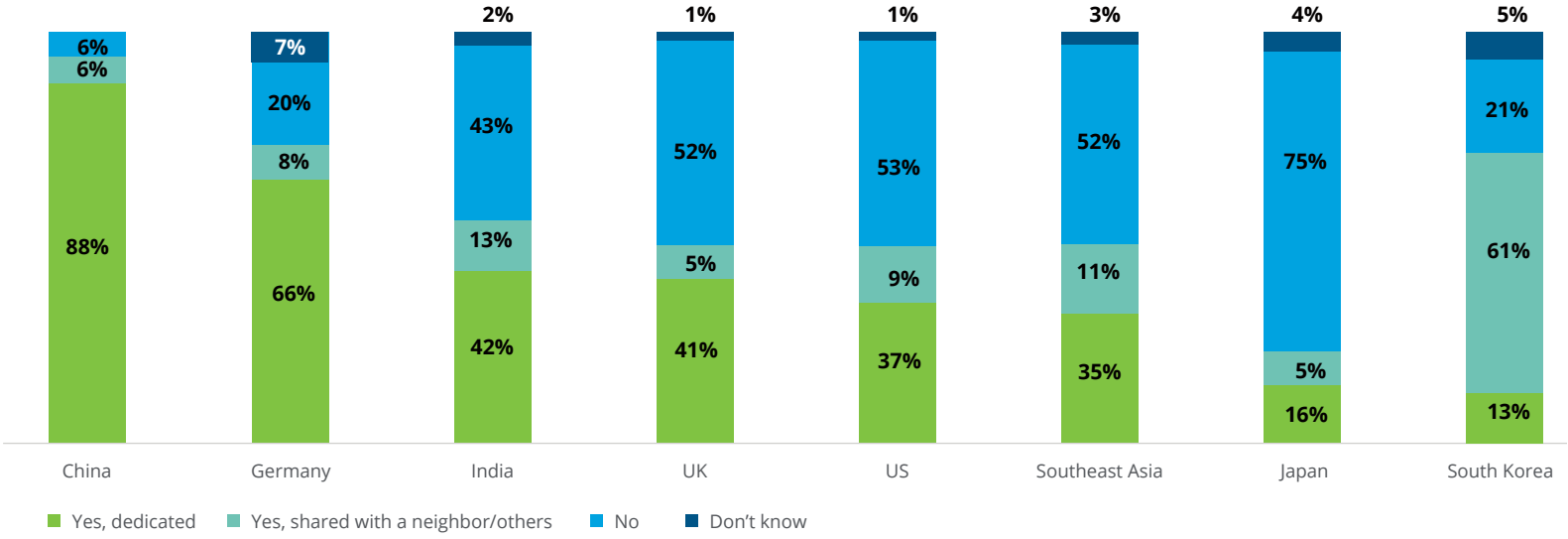
Expecting to charge electrified vehicle most often at…



Note: Percentages may not add up to 100 due to rounding.
Q43. Where do you expect to charge your EV most often?
Sample size: n= 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 307 [UK]; 116 [US]

Although a significant number of EV intenders (BEV+PHEV) responding to the survey expect to charge their vehicles at home, many still do not have access to a charger in markets like the US and Japan. This may be a source of concern for buyers that have not accounted for the additional installation cost.

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



Note: Percentages may not add up to 100 due to rounding.
Q44. Do you already have access to a charger at your residence?
Sample size: n= 180 [China]; 199 [Germany]; 166 [India]; 56 [Japan]; 119 [South Korea]; 782 [Southeast Asia]; 242 [UK]; 89 [US]

When charging their vehicle away from home, most EV intenders responding to the survey (except those in Germany) would prefer a dedicated charging station over a traditional service station equipped with EV chargers.

Preference for public EV charging location

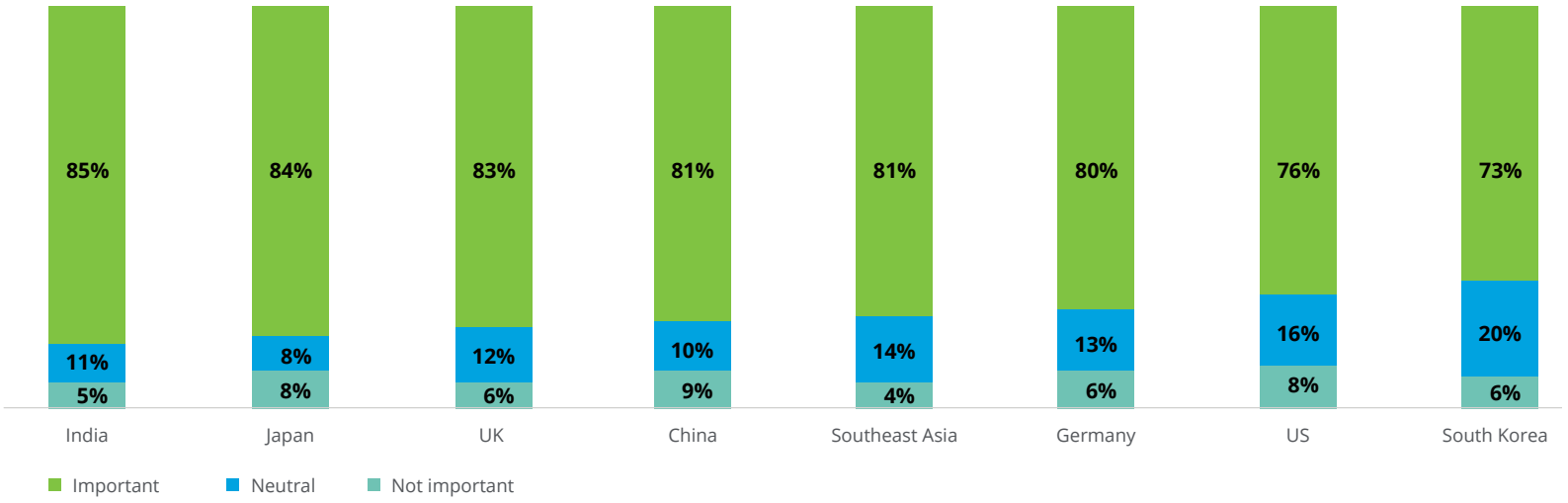
Public places	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Dedicated EV charging station	**36%**	15%	**47%**	**24%**	**47%**	**36%**	**44%**	**47%**
Traditional gas station with EV chargers	17%	**27%**	21%	18%	13%	30%	19%	20%
Vehicle dealership	10%	3%	5%	8%	1%	3%	2%	4%
Retail outlet/mall	4%	17%	2%	22%	3%	8%	10%	11%
Parking lot	14%	5%	11%	20%	27%	13%	12%	8%
On-street parking	9%	24%	8%	0%	4%	3%	6%	3%
Community/public building	9%	5%	5%	4%	6%	4%	3%	3%
Hotel	1%	3%	2%	4%	1%	1%	5%	3%
Other	0%	2%	0.4%	0%	0%	0.2%	0.3%	0%

Most preferred location

Note: Percentages may not add up to 100 due to rounding.
Q45. Where would you most want to charge your EV when you are away from home?
Sample size: n= 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 307 [UK]; 116 [US]

Across markets surveyed, charging cost is considered an important factor when choosing a public location to charge an EV. This highlights the importance of affordable charging rates for an increasing number of cost-conscious consumers.

Importance of charging cost when choosing public EV charging



Note: Percentages may not add up to 100 due to rounding; importance % is a sum of somewhat important and very important.
Q46. How important is charging cost when it comes to choosing a public location to charge your vehicle?
Sample size: n= 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 307 [UK]; 116 [US]

Card payments are the most common method for public EV charging across many markets, including Germany, Japan, the UK, US, and South Korea. Smartphone apps lead in China, while QR code–based payments are most preferred in India, reflecting a range of regional differences in digital payment habits.

Preferred method to pay for public EV charging

Payment method	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Charging network app on your smartphone	**47%**	20%	14%	14%	14%	**35%**	21%	29%
Credit/debit card	8%	**57%**	27%	**47%**	**70%**	22%	**57%**	**48%**
Pre-paid subscription plan	8%	6%	11%	4%	5%	9%	7%	9%
Loyalty points	12%	3%	6%	4%	6%	3%	5%	3%
Charging card/badge/pass provided by a third-party player	8%	8%	9%	0%	5%	6%	7%	7%
QR code/UPI	16%	5%	**33%**	31%	1%	25%	2%	2%
Other	0%	0%	0%	0%	0%	0.2%	1%	1%

Most preferred

Note: Percentages may not add up to 100 due to rounding.
Q47. How would you most prefer to pay for public EV charging?
Sample size: n= 312 [China]; 327 [Germany]; 266 [India]; 74 [Japan]; 196 [South Korea]; 1,247 [Southeast Asia]; 307 [UK]; 116 [US]

The top concerns regarding BEVs, cited by respondents in several global markets, are charging time, driving range, and battery-related costs or performance. Interestingly, battery safety is also commonly cited among respondents in South Korea, India, and China.

Greatest concern regarding BEVs

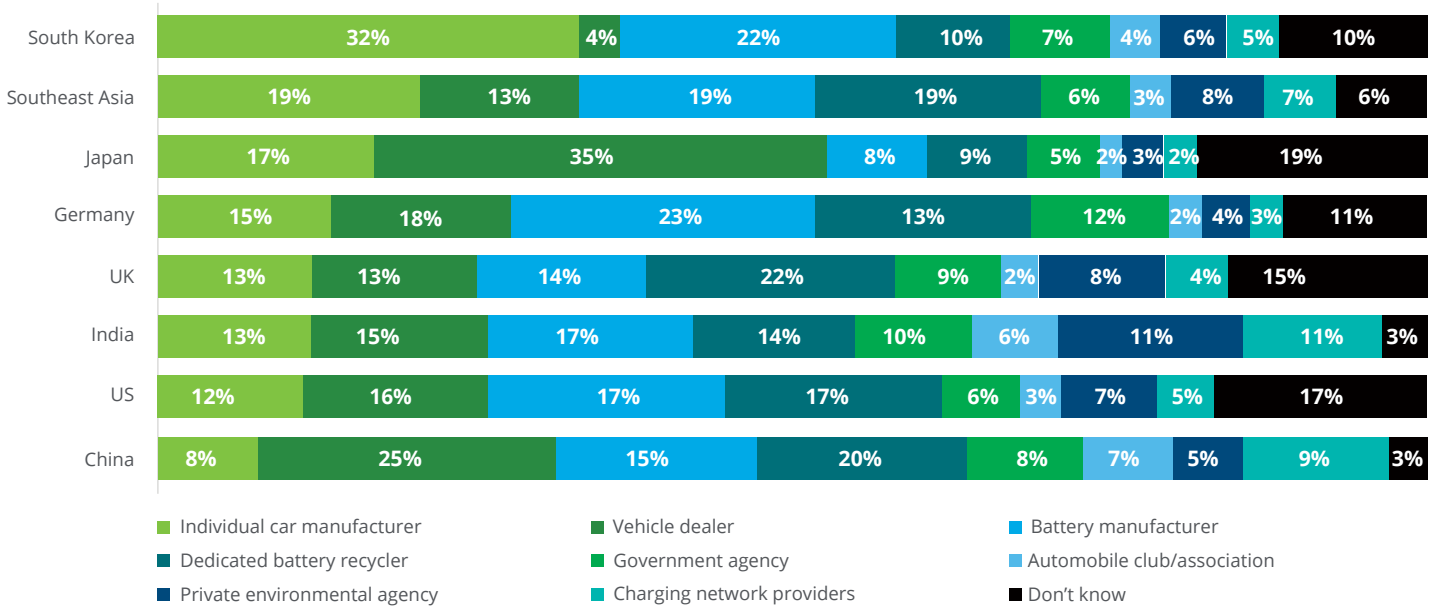
Factors	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Driving range	**30%**	**49%**	36%	37%	27%	**40%**	**48%**	**47%**
Cost/price premium	25%	**41%**	32%	**41%**	25%	37%	**45%**	**40%**
Cold weather performance	**32%**	36%	34%	22%	**39%**	26%	32%	31%
Increased need to plan my trips	17%	19%	26%	29%	10%	20%	30%	21%
Uncertain resale value	14%	24%	25%	16%	13%	25%	25%	15%
Potential for extra taxes/levies associated with BEVs	16%	8%	27%	10%	12%	19%	16%	16%
Time required to charge	**30%**	**41%**	**41%**	**42%**	**38%**	**44%**	**43%**	**44%**
Ongoing charging and running costs	**28%**	24%	27%	25%	22%	30%	26%	26%
Cost to eventually replace the battery	**30%**	37%	34%	36%	30%	**38%**	39%	38%
Lack of knowledge or understanding about EVs/EV technology	17%	16%	30%	12%	15%	32%	23%	23%
Lack of public EV charging infrastructure	20%	40%	**43%**	37%	31%	**40%**	39%	37%
Lack of charger at home	16%	**39%**	31%	**45%**	20%	29%	35%	35%
Lack of alternate power source (e.g., solar) at home	13%	23%	28%	22%	14%	26%	18%	21%
Safety concerns with battery technology	**32%**	30%	**38%**	31%	**50%**	37%	28%	27%
End-to-end sustainability (i.e., battery manufacturing/recycling)	21%	23%	34%	11%	13%	22%	22%	20%
Lack of choice regarding brands/models	12%	9%	24%	7%	7%	13%	11%	9%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q48. What are your biggest concerns regarding all battery-powered EVs? (Please select all that apply.)
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Opinions vary on who should oversee end-of-life EV battery management, with responsibility often assigned to car makers, dealers, and battery manufacturers, highlighting the lack of clear direction on how this important piece of the emerging ecosystem could evolve.

Consumer preference for entity responsible for collecting, storing, and recycling EV batteries after their useful lives

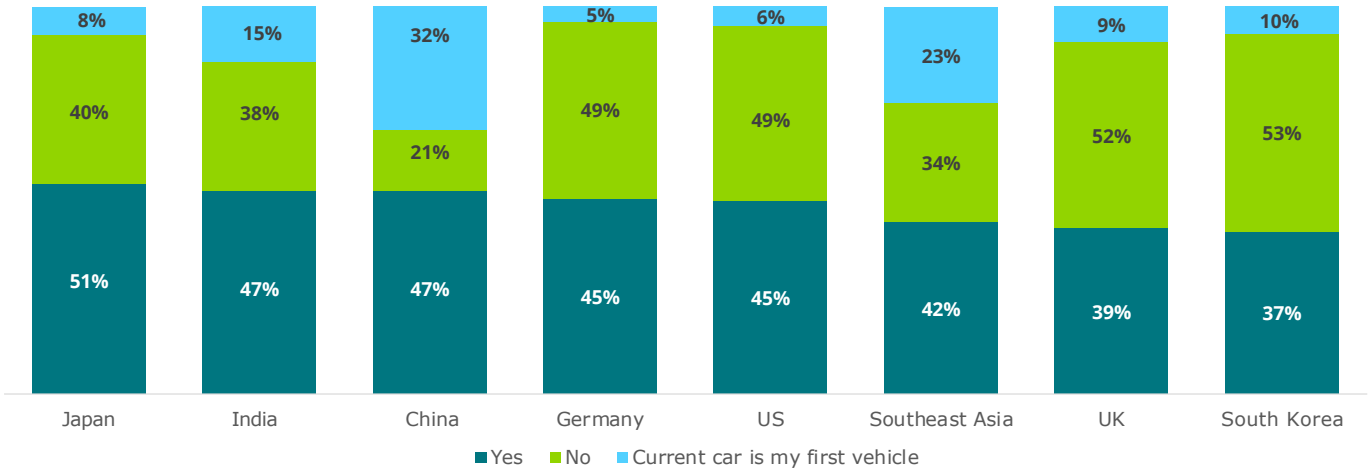


Note: Percentage for "Other" not shown. Total percentages may not add up to 100 as "Other" percentage is not shown and/or due to rounding.
Q49. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

2 Future vehicle intentions

Japan stands out with 51% brand loyalty, while survey respondents in the UK, US, South Korea, and Germany exhibit more brand switching behavior. Southeast Asia, China, and India have larger first-time owner segments, highlighting the differing retention and acquisition dynamics across these markets.

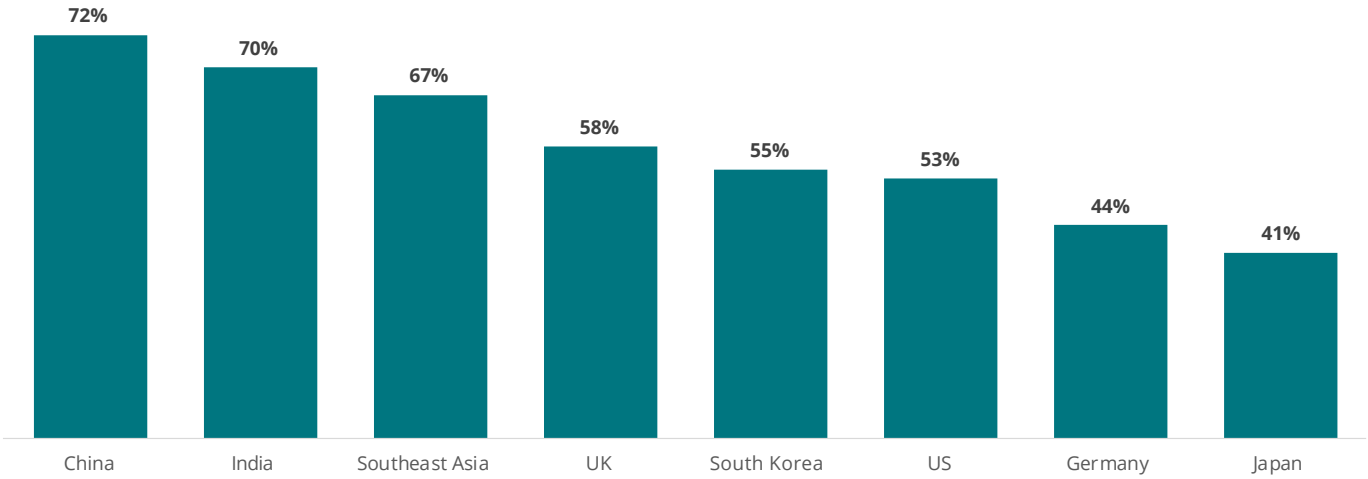
Percentage of consumers whose prior vehicle was from the same brand as current vehicle



Note: Percentages may not add up to 100 due to rounding.
Q9. Was your prior vehicle from the same brand?
Sample size: n= 905 [China]; 1,119 [Germany]; 1,048 [India]; 519 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 1,144 [UK]; 836 [US]

Consumers surveyed in China, India, and Southeast Asia exhibit the highest likelihood of switching to a different brand for their next vehicle, perhaps due to larger first-time owner segments with less entrenched brand loyalty. This reinforces the importance of focusing on the drivers of brand value over price to win and retain customers in competitive, rapidly evolving markets.

Percentage of consumers intending to switch to another brand* of vehicle



*Includes switching to a different brand from the same parent or a different brand from a different sales parent.
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= 778 [China]; 1,040 [Germany]; 1,021 [India]; 463 [Japan]; 613 [South Korea]; 3,667 [Southeast Asia]; 1,080 [UK]; 811 [US]

Across markets, product quality, vehicle performance, and price are the leading drivers of brand choice, while factors such as advertising, brand affiliations, and easy financing remain less influential, indicating that consumers prioritize core product and value attributes.

Most important factors driving the choice of brand for next vehicle

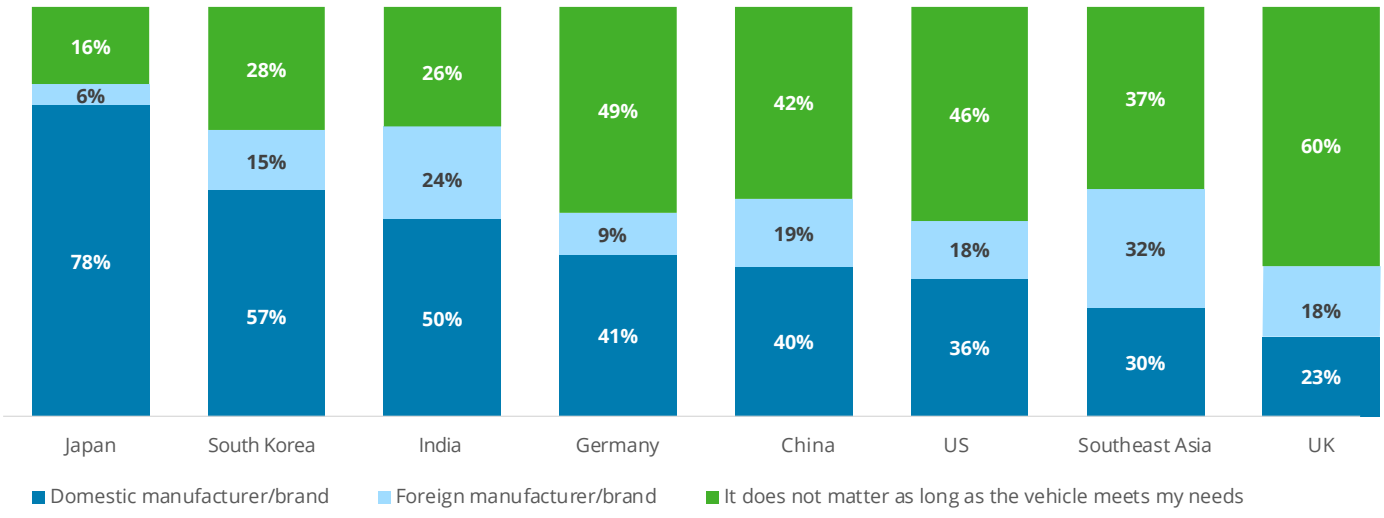
Drivers of brand choice	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Previous sales experience	15%	26%	21%	19%	5%	15%	12%	13%
Previous service experience	20%	20%	25%	16%	14%	19%	19%	20%
Product quality	**38%**	**50%**	**58%**	**46%**	**49%**	**59%**	**60%**	**58%**
Brand advertising	14%	3%	26%	4%	5%	12%	7%	8%
Brand image	32%	14%	45%	17%	22%	34%	20%	17%
Brand affiliations (e.g., sponsorships, partners)	16%	5%	26%	5%	5%	11%	6%	7%
Brand familiarity	**35%**	**39%**	41%	23%	21%	30%	35%	34%
Quality of overall ownership experience	24%	38%	46%	8%	26%	35%	37%	38%
Vehicle features/technology	34%	30%	**50%**	42%	39%	46%	37%	35%
Availability of battery electric vehicles/hybrid options	24%	14%	35%	15%	19%	23%	20%	13%
Vehicle performance (e.g., fuel efficiency, battery range)	**40%**	34%	**57%**	**49%**	**54%**	**57%**	**54%**	**51%**
Price	20%	**54%**	44%	**52%**	**43%**	**49%**	**52%**	**46%**
Vehicle service and maintenance network	23%	20%	43%	19%	29%	38%	26%	22%
Easy financing options	16%	12%	32%	7%	11%	23%	17%	15%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options; "Other" not shown due the low response rate.
Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Domestic brand preference is strongest among survey respondents in Japan, but far lower in Southeast Asia and the UK, underscoring how brand origin can play a very different role in consumer decision-making across markets.

Preferred organizations for next vehicle purchase



Note: Percentages may not add up to 100 due to rounding.
Q50. From which of the following are you most interested in acquiring your next vehicle?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Dealer visits and manufacturer websites are among the most used information sources for next vehicle research, with social media and influencer reviews playing a notable role in India and Southeast Asia. Printed media remains one of the least relied-upon channels, reinforcing the decision taken by many OEMs to redirect their marketing budget in favor of digital channels.

Information sources for next vehicle purchase

Information sources	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Word of mouth	36%	33%	40%	25%	22%	31%	31%	31%
Printed media	15%	11%	28%	11%	5%	15%	10%	11%
Online media and auto portals	38%	34%	50%	27%	40%	46%	32%	34%
Vehicle owner forum/blogs	30%	16%	40%	9%	22%	32%	24%	23%
Social media and influencer reviews	24%	16%	**59%**	20%	35%	**53%**	24%	25%
Manufacturer website	40%	40%	54%	**50%**	30%	47%	47%	42%
Dealer website	38%	36%	41%	29%	21%	40%	50%	40%
Dealer visit	**42%**	**56%**	46%	49%	**46%**	52%	**53%**	**47%**

■ Most used information source

Q30. Which of the following sources would you use to gather information about your next vehicle? Please select all that apply.
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

According to survey respondents, the most important aspects of their next vehicle purchase experience center on obtaining a good deal with transparent pricing and direct physical interaction—reinforcing why dealer visits remain a primary source of information for many consumers.

Most important aspects of next vehicle purchase experience

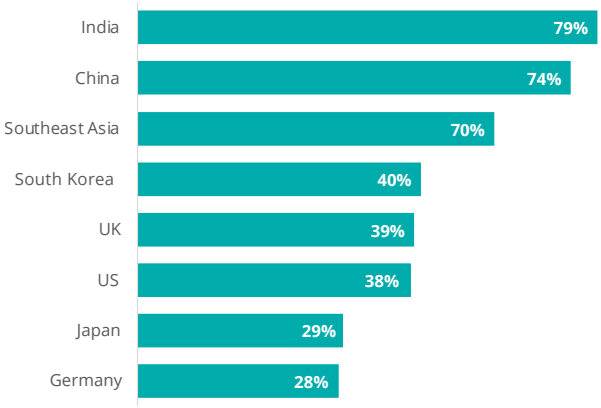
Drivers of brand choice	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Getting all my questions answered	29%	30%	26%	13%	14%	28%	28%	27%
Making good use of my time	25%	10%	**28%**	11%	16%	21%	15%	16%
Physical interaction with the vehicle (i.e., test drive)	**35%**	**34%**	**40%**	**40%**	**24%**	**41%**	**45%**	**40%**
Building trust in the salesperson	28%	23%	21%	32%	21%	16%	14%	14%
Ability to complete all or some of the process virtually	17%	10%	26%	7%	11%	18%	12%	13%
Convenient location	25%	26%	21%	24%	21%	19%	32%	23%
Getting a good deal	**32%**	**62%**	**40%**	**53%**	**58%**	**48%**	**64%**	**62%**
Transparent pricing	**32%**	**33%**	**35%**	**47%**	**58%**	**47%**	**44%**	**47%**
Low pressure experience	13%	25%	15%	28%	12%	13%	19%	27%
Having a resource for post-purchase needs	**38%**	26%	21%	32%	**42%**	25%	12%	15%
To be offered different financing and usage-based models	25%	20%	27%	14%	21%	26%	14%	16%

■ Most commonly cited

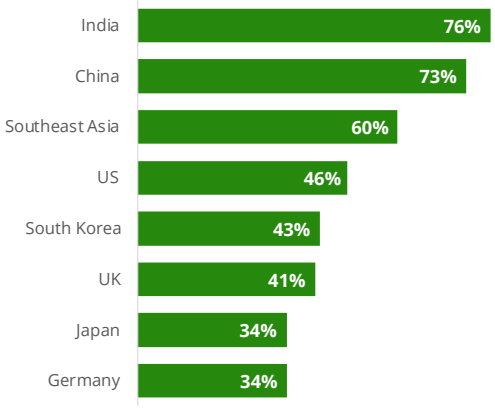
Note: Sum of the percentages exceeds 100% as respondents can select multiple options.
Q51. What are the top three most important aspects of your next vehicle purchase experience?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Interest in buying vehicles and insurance directly from manufacturers is highest in India, China, and Southeast Asia, but much lower in Japan and Germany—showing that openness to agency-style, direct-to-consumer models differs widely across markets.

Percentage of surveyed consumers who would be interested in **purchasing insurance directly from the manufacturer** (% somewhat/very interested)



Percentage of surveyed consumers who would be interested in **acquiring vehicle directly from the manufacture**r (% somewhat/very interested)



Q39. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?;
Q40. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?
Sample size: 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5.196 [Southeast Asia]; 1,363 [UK]; 944 [US]

3 Connectivity

Survey respondents are most willing to pay for safety and security features—especially emergency assistance, automatic detection of other vehicles and pedestrians, and anti-theft tracking—eclipsing other convenience-oriented options.

Willingness to pay extra for connected vehicle services (% somewhat willing/very willing)

Connected vehicle data	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Automatic detection of vehicles and pedestrians	**70%**	**48%**	**79%**	**51%**	**72%**	73%	**51%**	**59%**
Emergency assistance (e.g., collision detection)	**73%**	**51%**	**85%**	**52%**	**72%**	**82%**	**59%**	**58%**
Anti-theft tracking	**73%**	**53%**	**84%**	**47%**	**65%**	**83%**	**66%**	**61%**
Warranty/recall notices	68%	40%	78%	33%	58%	72%	50%	54%
App connectivity	66%	31%	78%	22%	50%	69%	44%	46%
Autonomous/remote parking	69%	28%	75%	35%	54%	63%	40%	37%
Infotainment functions (e.g., navigation, video streaming, etc.)	65%	42%	77%	36%	62%	67%	48%	50%
Vehicle health reporting and maintenance cost forecasts	69%	38%	**79%**	32%	60%	**74%**	49%	48%
Optimized vehicle insurance plan based on your driving habits	69%	35%	77%	33%	54%	70%	46%	47%
Digital key (e.g., using a smartphone to unlock/start vehicle)	65%	28%	77%	33%	62%	67%	38%	46%

Most commonly cited

Q52. To what extent would you be willing to pay extra for each of the following connected vehicle services?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Consumers surveyed are concerned about sharing connected-vehicle data, including information from synced devices, in-cabin cameras, and vehicle location, highlighting growing sensitivities around privacy and the handling of personally identifiable data.

Level of concern regarding data-sharing (% somewhat/very concerned)

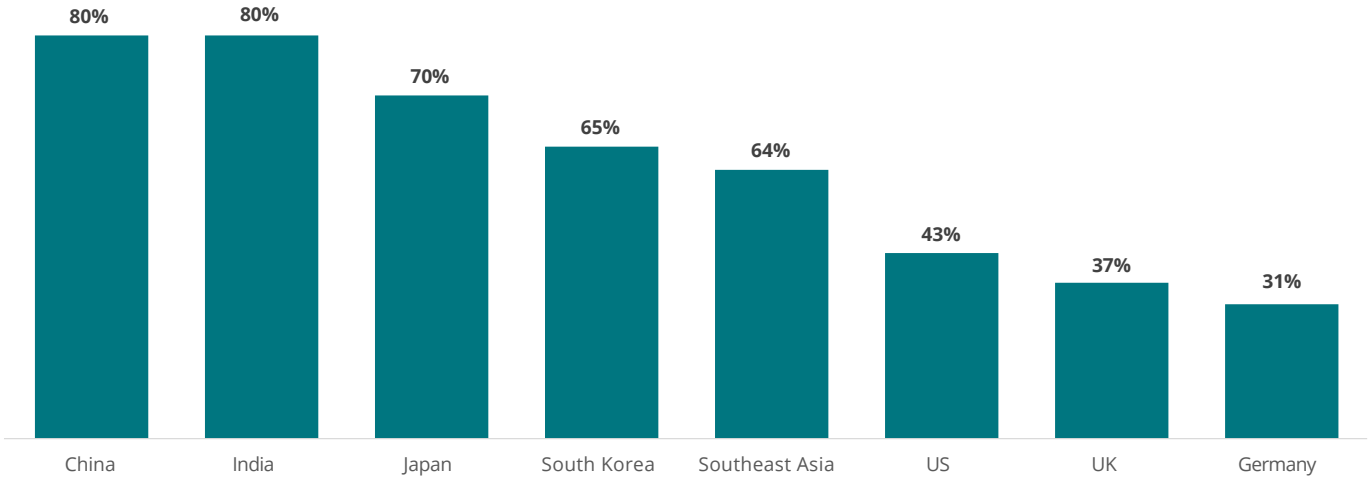
Connected vehicle data	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Sensor data related to vehicle status (e.g., brake fluid level)	**42%**	22%	67%	29%	42%	48%	33%	39%
Data related to driving behavior (e.g., braking, acceleration, speed)	40%	38%	66%	31%	46%	51%	47%	53%
Data related to vehicle location (e.g., historic and real-time)	39%	49%	**72%**	**43%**	**51%**	**56%**	55%	**58%**
Biometric data collected by sensors in the cockpit (e.g., your heart rate)	39%	**55%**	**70%**	32%	42%	52%	**58%**	**56%**
Data related to the use of connected services (e.g., smartphone apps)	**45%**	**52%**	**70%**	33%	45%	**56%**	56%	55%
(Data synced from connected devices (e.g., contacts, call logs, messages)	**44%**	**58%**	**73%**	**40%**	**58%**	**60%**	**63%**	**62%**
Data from in-cabin cameras (e.g., driver monitoring, eye-tracking, child presence detection)	41%	**58%**	**72%**	**39%**	**49%**	**57%**	**60%**	**58%**

Most commonly cited

Q53. As vehicles become more and more connected to the internet, how concerned would you be if the following types of data were shared with your vehicle manufacturer, dealer, insurance company, and/or other third parties?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Voice command support in local languages is important in Asia-Pacific markets, but interest is much lower in Western countries such as the US, UK, and Germany, signaling a regional difference in digital engagement expectations.

Importance of next vehicle to support voice commands in local languages (% somewhat/very important)

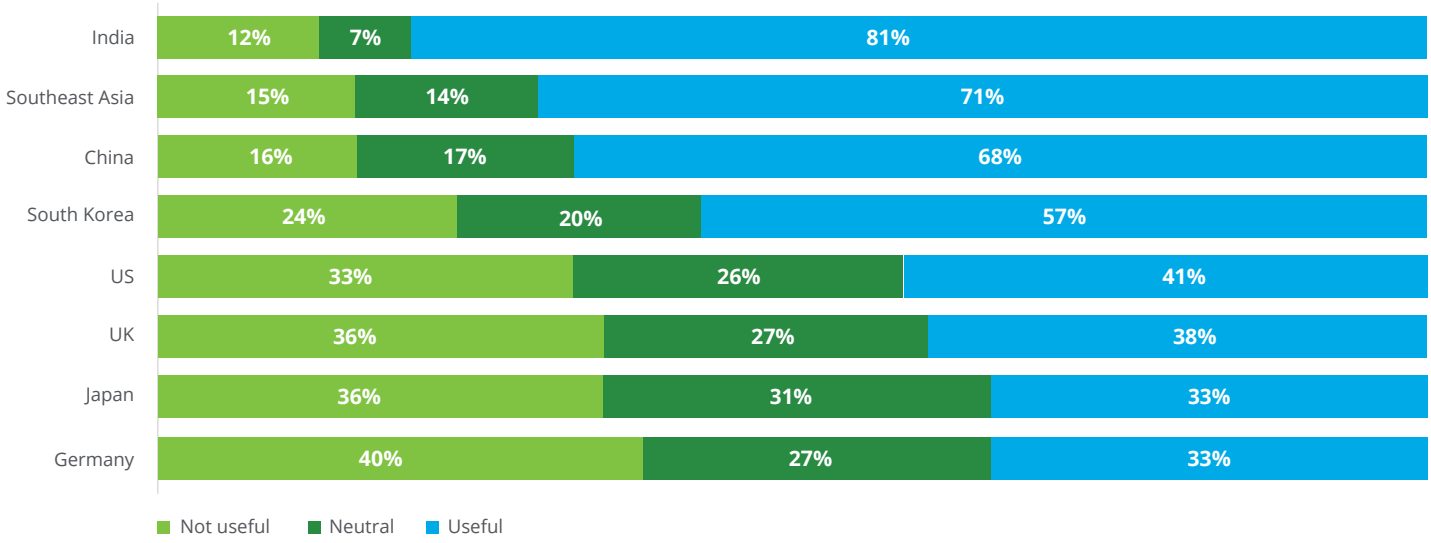


Q54. How important is it for your next vehicle to support voice commands in local languages?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

4 Software-defined vehicles

The perceived usefulness of software-defined vehicles is highest in developing economies, while enthusiasm is notably lower in mature markets, including the US, UK, Japan, and Germany, highlighting a clear divide in comfort with software-centric vehicle concepts.

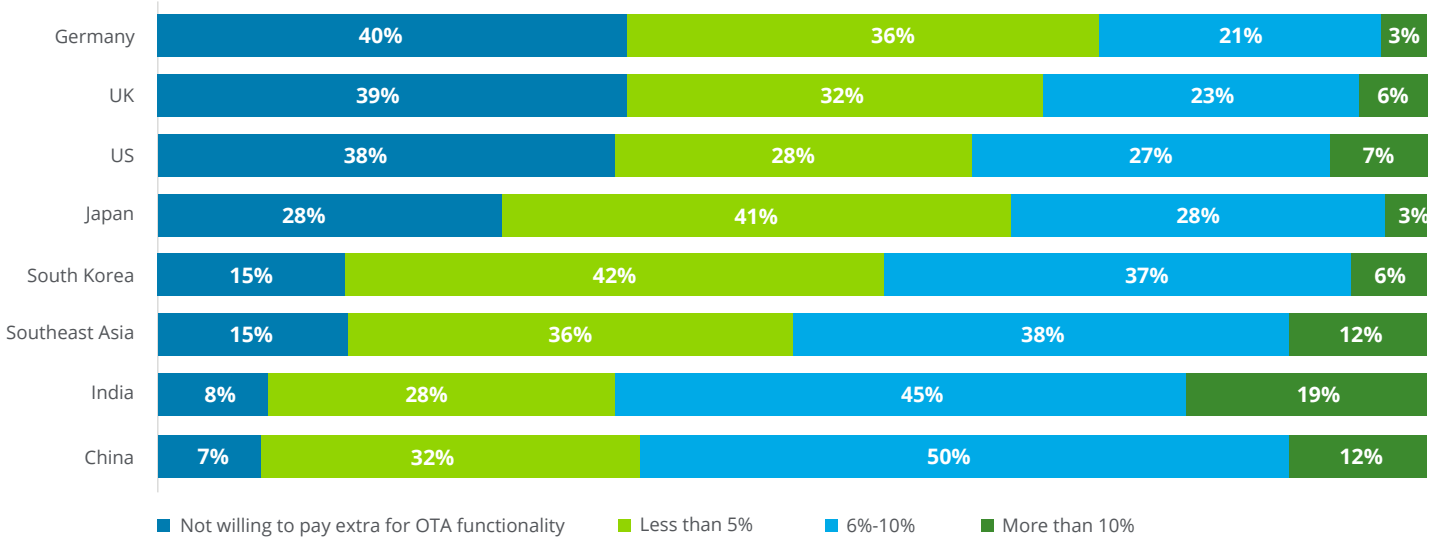
Perceived usefulness of software-defined vehicles



Note: "Not useful" is the sum of not at all useful, slightly useful, and somewhat useful while "useful" is the sum of useful, very useful, and extremely useful.
Q55. Software-defined vehicles allow customization and feature expansion not only before purchase, but throughout the vehicle's life cycle. How useful do you find the idea of your next vehicle being primarily software-defined?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Willingness to pay extra for over-the-air (OTA) update capability is highest in China and India, while consumers surveyed in Germany, the UK, and US are less inclined to pay, suggesting that in mature markets, OTAs may be viewed as an expected baseline feature rather than something worth a premium.

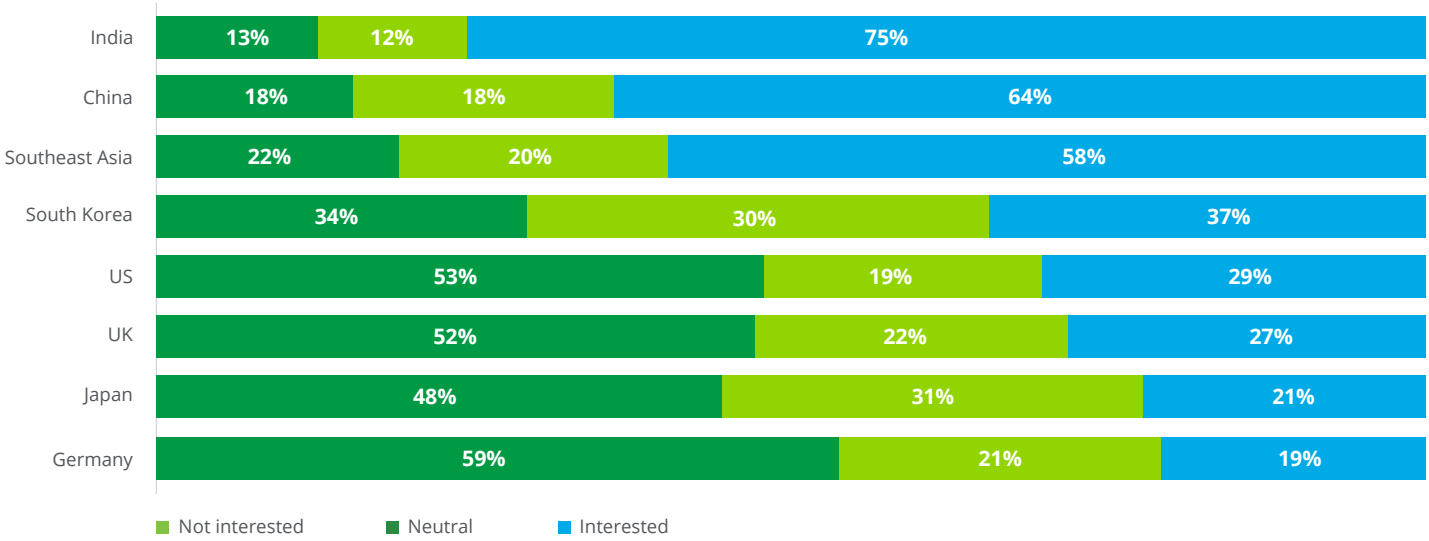
Willingness to pay above vehicle list price for OTA update capability



Note: Percentages may not add up to 100 due to rounding.
Q56. Over-the-air (OTA) software updates downloaded directly to a vehicle can eliminate the need for workshop visits.
How much more would you be willing to pay for a vehicle that includes automated OTA updates versus a traditional vehicle requiring workshop visits? Please indicate the amount as a percentage above the vehicle's list price.
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Interest in vehicle-based integrated services is strongest in India, China, and Southeast Asia, while consumers surveyed in Western markets are more cautious, suggesting varying levels of openness to expanding the vehicle's role within a broader service ecosystem.

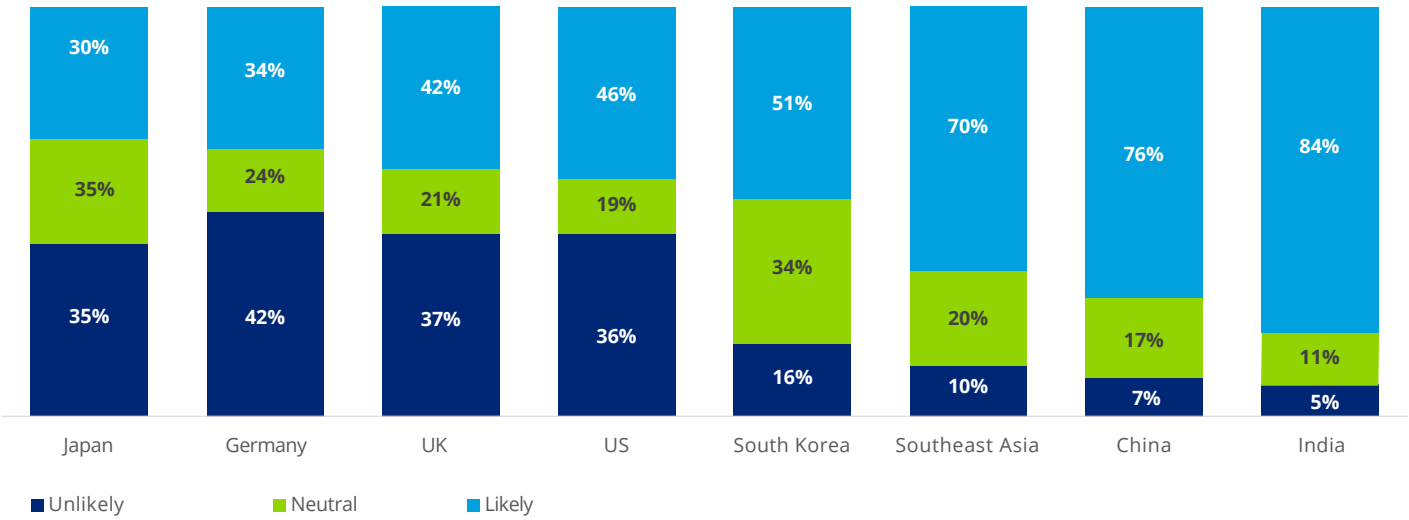
Consumer interest in using vehicles as platforms for integrated services



Note: Percentages may not add up to 100 due to rounding; "Not interested" is the sum of not at all interested, slightly interested, and somewhat interested, while "Interested" is the sum of interested, very interested, and extremely interested.
Q57. Software-defined vehicles can serve as platforms for services such as package delivery, grocery drop-off, valet parking, dynamic insurance pricing, or on-demand autonomous rides. How interested are you in using your vehicle to access such integrated services?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Many consumers surveyed in Asian markets expressed a willingness to use AI-enabled customization features that automatically adjust in-vehicle settings, suggesting a growing level of comfort with vehicles that can recognize preferences and adapt without manual input to enhance convenience and personalization.

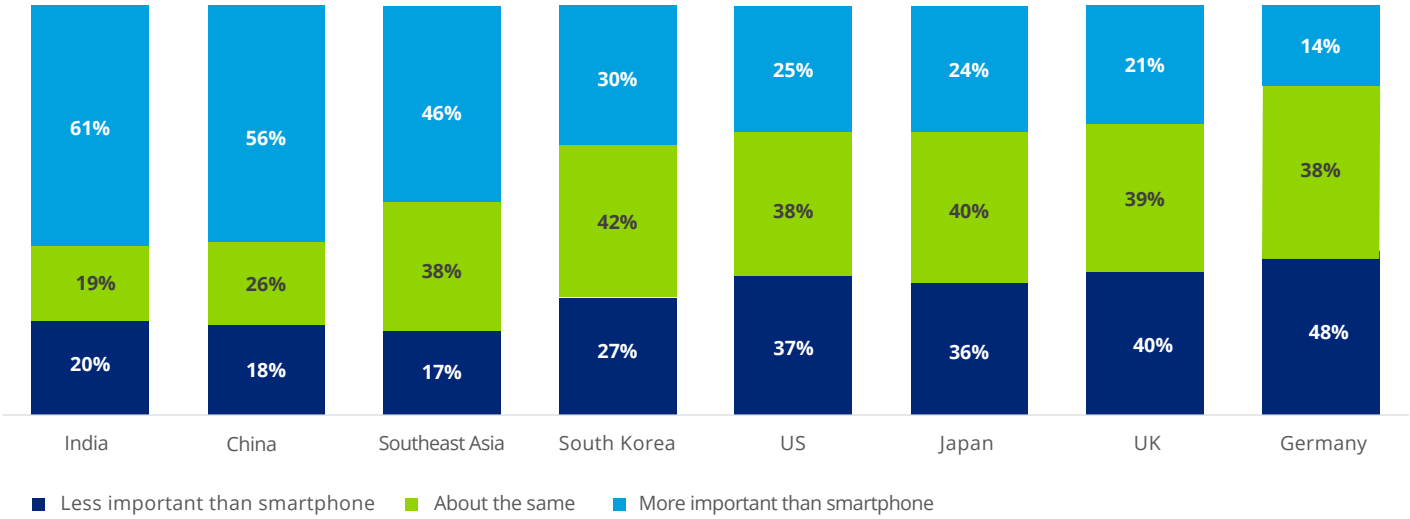
Likelihood of using AI-enabled vehicle customization features



Note: Percentages may not add up to 100 due to rounding; "Unlikely" is the sum of very unlikely, unlikely, and slightly unlikely, while "Likely" is the sum of slightly likely, likely, and very likely.
Q60. AI-enabled customization allows your vehicle to recognize and adapt to your preferences without manual input (e.g., adjusting climate settings, seat positions, cabin lighting). How likely would you be to use such AI-enabled features in your next vehicle?
Sample size: n= 261 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Most survey respondents still view their smartphone as their main digital device, but in markets like India and China, many now consider the in-vehicle ecosystem more important, reflecting rising expectations for stronger digital experiences inside the car.

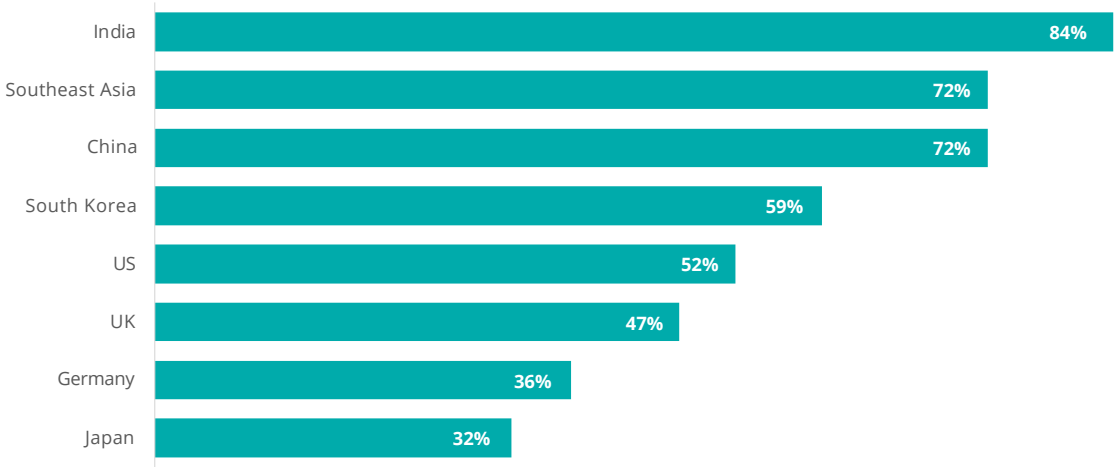
Perceived importance of in-vehicle ecosystems compared with smartphones



Note: Percentages may not add up to 100 due to rounding; "Less important" is the sum of much less important, less important, and slightly less important, while "more important" is the sum of slightly more important, more important, and much more important.
Q61. If an in-vehicle ecosystem offered features like advanced driving assistance, additional comfort functions, or integrated third-party services (e.g., insurance, repair shops), how would you compare its importance to that of your smartphone?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Many consumers surveyed say they would likely keep their vehicle longer if it received regular OTA updates that add new features, safety enhancements, or performance improvements, suggesting that continuous software upgrades can play a meaningful role in extending vehicle ownership.

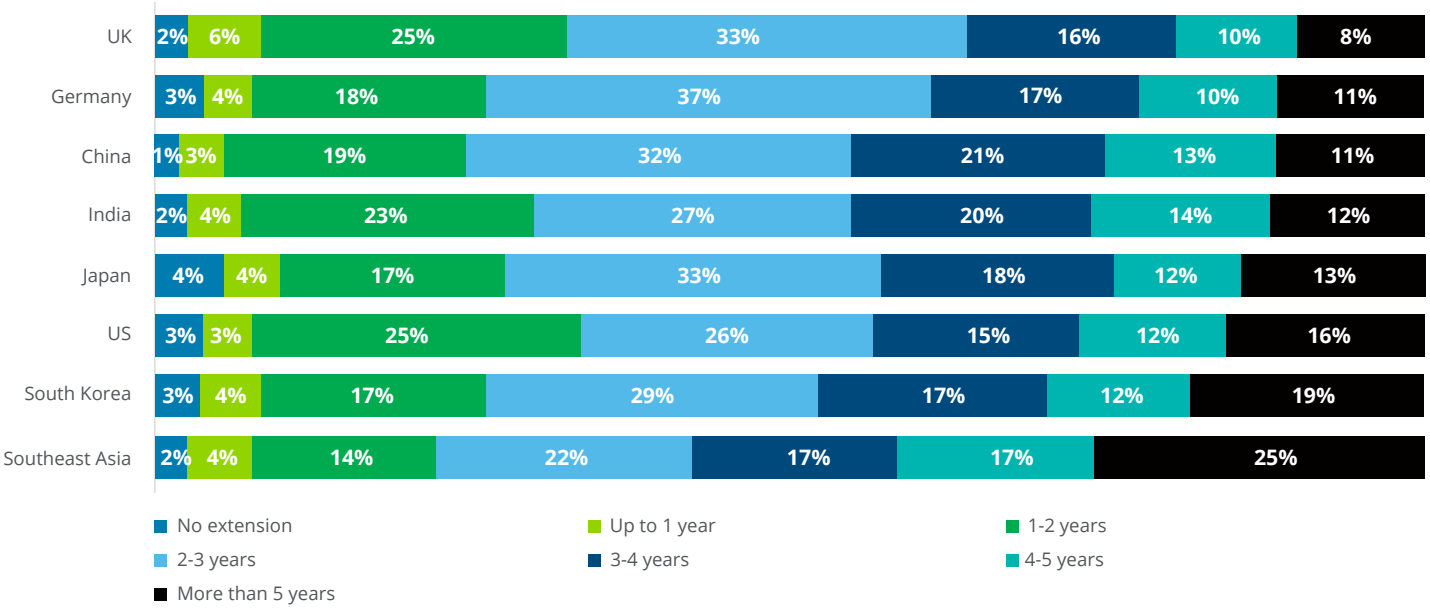
Likelihood of keeping a vehicle longer if regular OTA updates enhance the mobility experience



Note: Likelihood percentage is the sum of slightly likely, likely, and very likely.
Q62. How likely would you be to keep a vehicle longer if it received regular OTA updates to help enhance your mobility experience (e.g., new features, safety improvements, performance enhancements)?
Sample size: n= 859 [China]; 1,280 [Germany]; 1,346 [India]; 683 [Japan]; 909 [South Korea]; 5,196 [Southeast Asia]; 1,363 [UK]; 944 [US]

Many consumers surveyed would keep their vehicles one to three years longer with regular OTA updates, opening the door for OEMs to strengthen brand loyalty through frequent digital engagement, while growing software-based revenue and reducing their reliance on hardware redesigns.

Number of additional years consumers would keep their vehicle with OTA enhancements

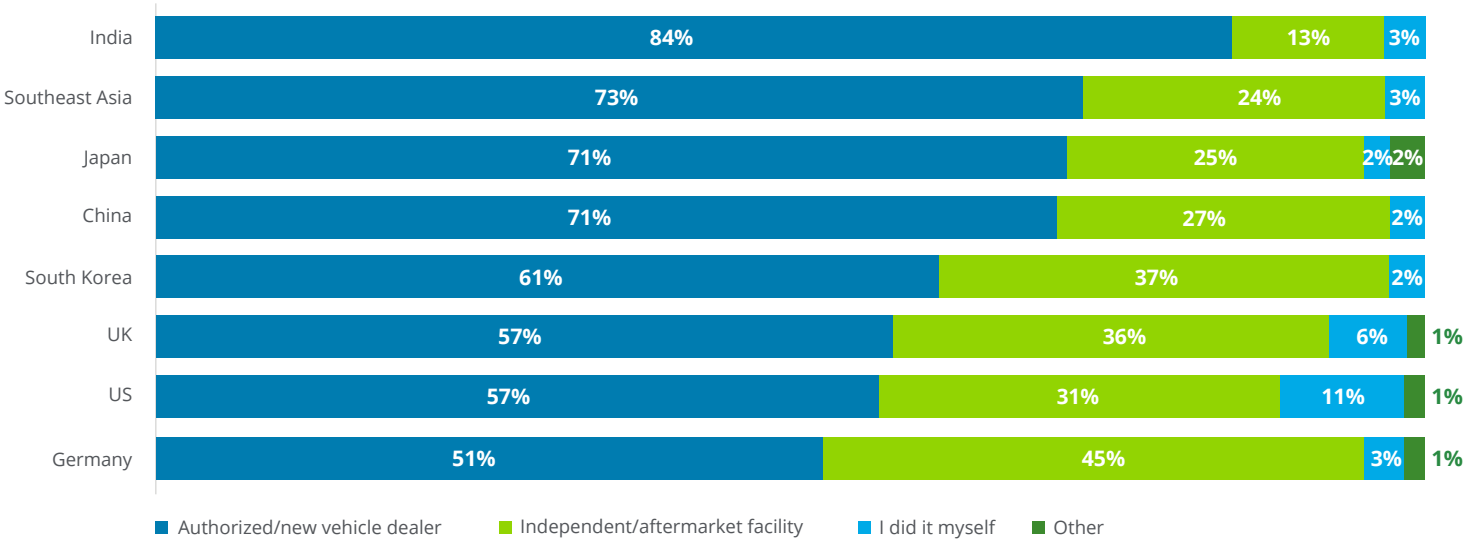


Note: Percentages may not add up to 100 due to rounding.
Q63. How many additional years would you expect to extend your ownership of the vehicle?
Sample size: n= 617 [China]; 459 [Germany]; 1,135 [India]; 221 [Japan]; 540 [South Korea]; 3,765 [Southeast Asia]; 645 [UK]; 489 [US]

5 Vehicle servicing

Most consumers surveyed report having their most recent vehicle service event at an authorized dealer, though a sizable number of people rely on aftermarket providers in Germany, South Korea, and the UK, perhaps reflecting a desire to maximize the value of the work performed.

Most recent vehicle service experience by type of facility



Note: Percentages may not add up to 100 due to rounding.
Q16. Where was your most recent vehicle service experience?
Sample size: n= 905 [China]; 1,119 [Germany]; 1,048 [India]; 518 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 1,144 [UK]; 836 [US]

Surveyed consumers primarily choose vehicle service providers based on the quality of work performed, which can build trust and lead to increased loyalty and advocacy behaviors over time.

Most important reason for choosing a vehicle service provider

Reason to choose a service provider	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Cost	9%	19%	5%	15%	10%	10%	12%	14%
Trust	17%	23%	23%	**36%**	25%	18%	**18%**	19%
Convenience (e.g., location, hours)	16%	5%	11%	11%	15%	12%	15%	15%
Quality of work	**20%**	**25%**	**26%**	20%	**28%**	**26%**	17%	**20%**
Customer experience	13%	8%	12%	3%	7%	9%	10%	11%
Personal relationship with mechanic/ technician	5%	7%	7%	8%	6%	5%	7%	6%
Warranty coverage	14%	9%	11%	5%	6%	16%	17%	13%
Complexity of work required	7%	4%	5%	2%	2%	3%	2%	2%

Most commonly cited

Note: Other % not shown.
Q17. What is the most important reason for your preferred choice of vehicle service provider?
Sample size: n= 882 [China]; 1,074 [Germany]; 1,018 [India]; 495 [Japan]; 635 [South Korea]; 3,757 [Southeast Asia]; 1,065 [UK]; 739 [US]

Transparency around pricing and the work performed consistently ranks as the most important aspect of the vehicle service experience, highlighting consumers' strong desire for clear, fair, and well-explained servicing outcomes.

Most important aspect of a vehicle service experience

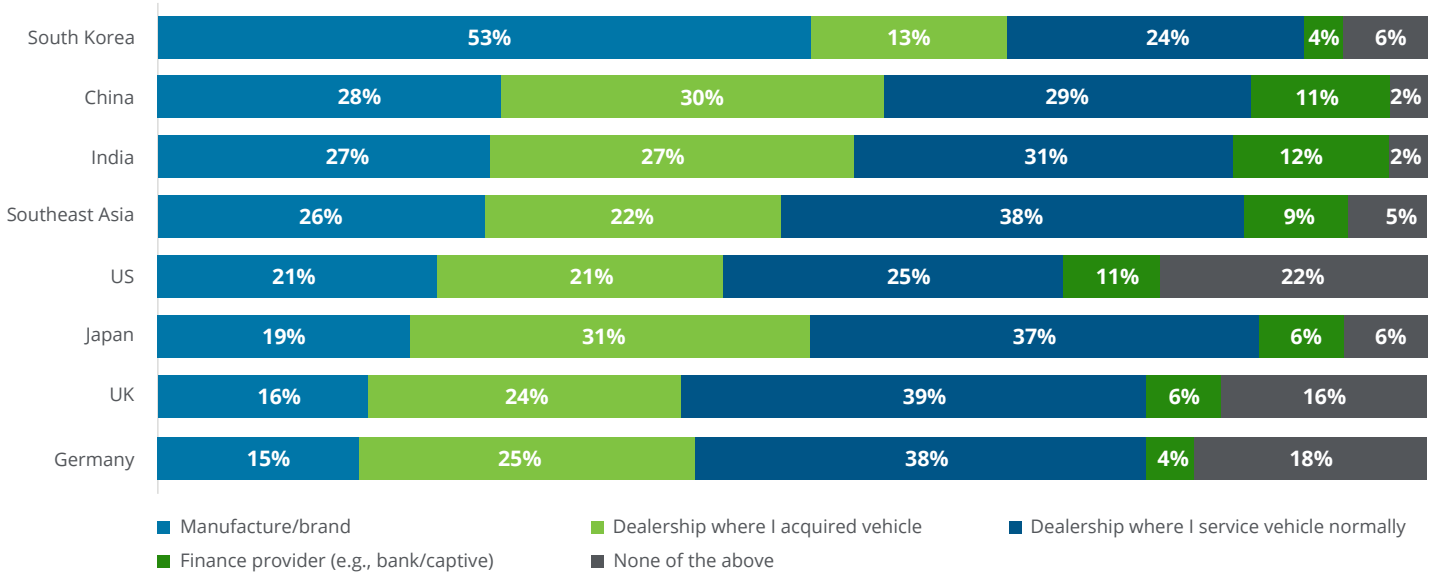
Important aspect of vehicle service experience	China	Germany	India	Japan	South Korea	Southeast Asia	UK	US
Customer service/treatment	**13%**	13%	12%	9%	10%	18%	14%	15%
Communication while the vehicle is being serviced	**13%**	4%	8%	3%	6%	5%	4%	5%
Explanation of service work performed	7%	8%	9%	16%	10%	11%	8%	10%
Cost/price	10%	**30%**	10%	13%	16%	13%	20%	20%
Transparency of pricing and work performed	**13%**	21%	**22%**	**41%**	**37%**	**27%**	**23%**	**24%**
Convenient location	6%	9%	6%	4%	8%	5%	12%	7%
Availability of appointment	6%	3%	5%	2%	3%	3%	3%	4%
Online booking tool	4%	1%	4%	1%	1%	1%	1%	1%
Speed of service	12%	7%	12%	5%	4%	8%	8%	8%
Efficiency of check-in/check-out process	11%	1%	8%	1%	4%	6%	4%	4%
Access to temporary/loaner vehicle	4%	2%	3%	3%	2%	3%	2%	1%

Most commonly cited

Q21. What is the most important aspect of a vehicle service experience?
Sample size: n= 882 [China]; 1,074 [Germany]; 1,018 [India]; 495 [Japan]; 635 [South Korea]; 3,757 [Southeast Asia]; 1,065 [UK]; 739 [US]

With the exception of South Korea, surveyed consumers place the highest trust in the dealership where they regularly service their vehicle rather than the manufacturer or the selling dealership, underscoring the influence of ongoing service interactions in shaping long-term customer relationships.

Who do vehicle owners most trust?



Note: Percentages may not add up to 100 due to rounding.
Q22. With whom do you have the most trusted relationship?
Sample size: n= 905 [China]; 1,119 [Germany]; 1,048 [India]; 518 [Japan]; 646 [South Korea]; 3,870 [Southeast Asia]; 1,144 [UK]; 836 [US]

6 Study overview

About the study

The 2026 study includes 28,553 consumer responses from 27 countries.

Americas	Sample
Argentina (AR)	1,004
Brazil (BR)	1,000
Canada (CA)	1,001
Mexico (MX)	1,001
United States (US)	1,000

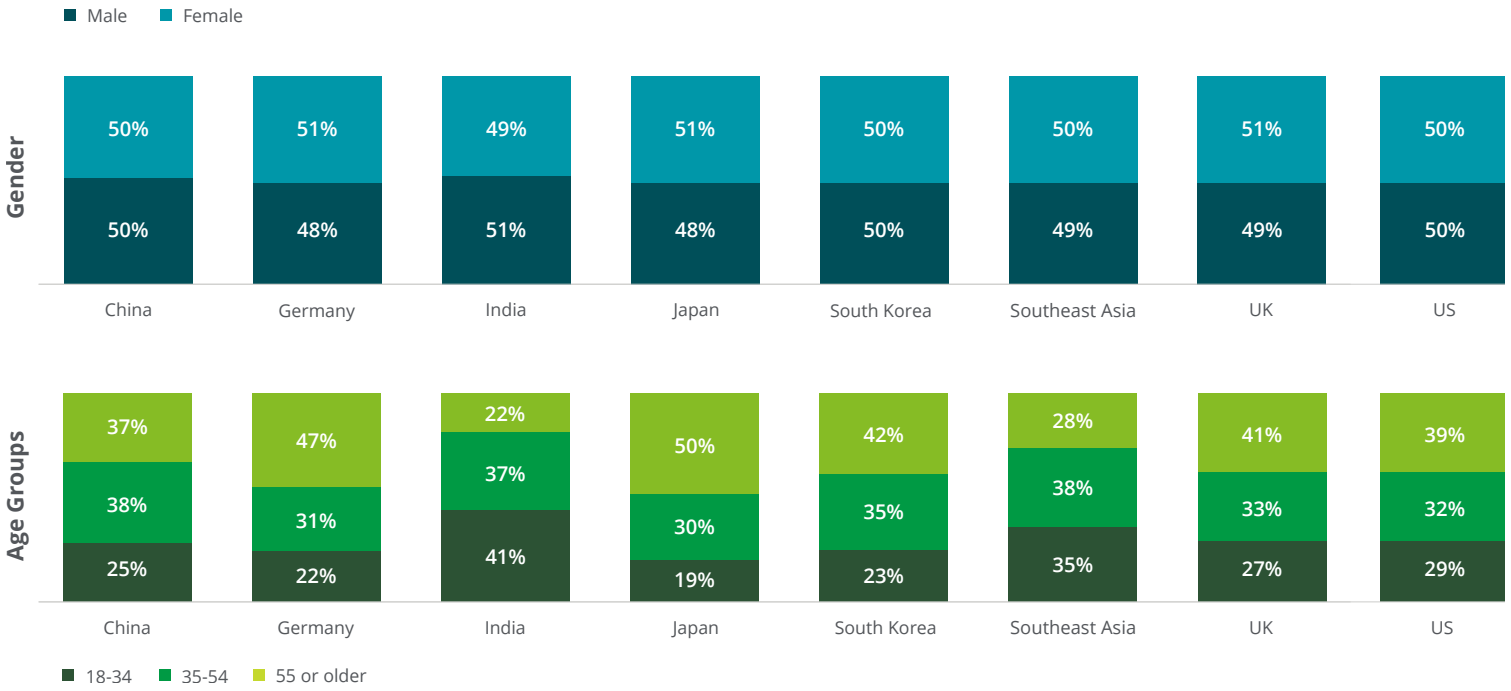
EMEA	Sample
Austria (AT)	1,000
Belgium (BE)	1,004
France (FR)	1,004
Germany (DE)	1,501
Italy (IT)	1,004
Netherlands (NL)	1,002
Saudi Arabia (SA)	1,001
Spain (ES)	1,003
Turkey (TR)	1,000
United Arab Emirates (AE)	1,006
United Kingdom (UK)	1,502

Asia-Pacific	Sample
Australia (AU)	1,002
China (CN)	1,000
India (IN)	1,501
Indonesia (ID) - SEA	1,004
Japan (JP)	1,004
Malaysia (MY) - SEA	1,002
Philippines (PH) - SEA	1,000
South Korea (KR)	1,000
Singapore (SG) - SEA	1,000
Thailand (TH) - SEA	1,007
Vietnam (VN) - SEA	1,000

Study methodology
The study was fielded from October through November 2025 using an online panel methodology where consumers of driving age were invited to complete the questionnaire (translated into local languages) via email.

Note: "Sample" represents the number of survey respondents in each country.

Study demographics



Note: Percentages may not add up to 100 due to rounding.
Note: Nonbinary/Nongender-confirming/Prefer not to answer percentages were less than 1%; Southeast Asia region comprises Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam markets.
Sample size: n= 1,000 [China]; 1,501 [Germany]; 1,501 [India]; 1,004 [Japan]; 1,000 [South Korea]; 6,013 [Southeast Asia]; 1,502 [UK]; 1,000 [US]

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