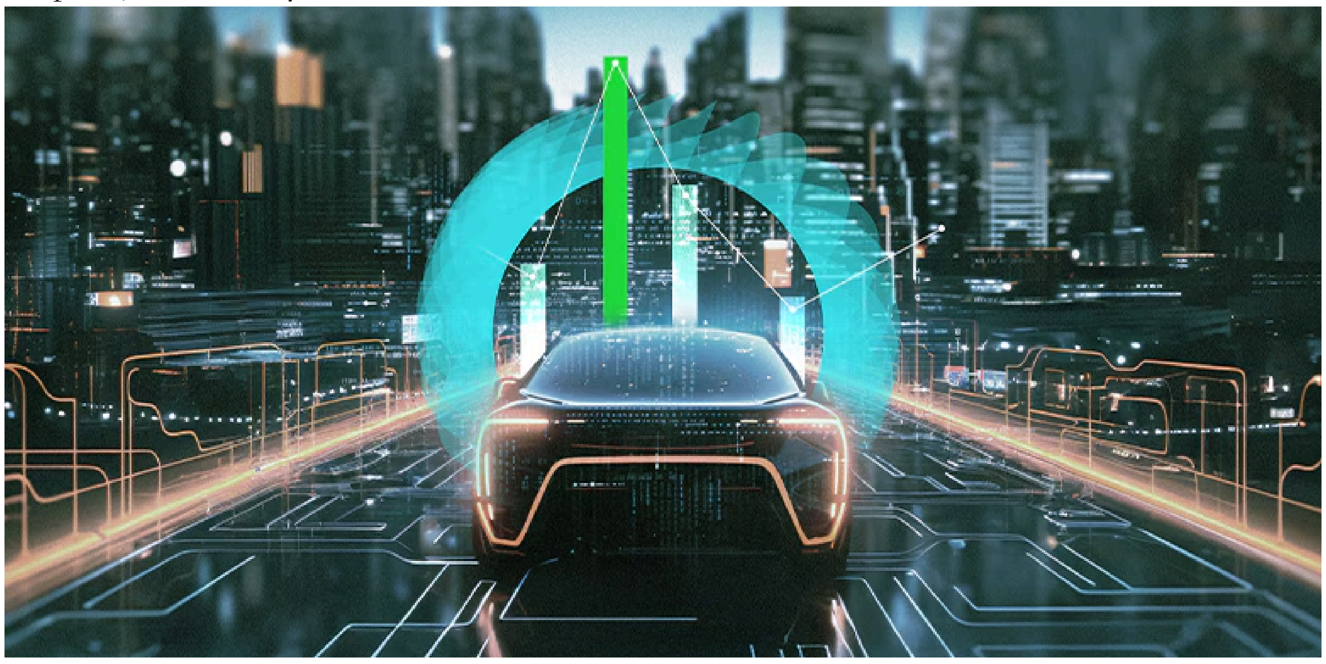
2025 Global Automotive Consumer Study

Deloitte has been exploring key consumer trends impacting a rapidly evolving global mobility ecosystem for over a decade. The Global Automotive Consumer Study helps to inform Deloitte's point of view on the evolution of mobility, smart cities, connectivity, sustainability, and other issues surrounding the movement of people and goods.

Now, in its 13th year, the 2025 Global Automotive Consumer Study provides important insights that can help companies prioritize and better position their business strategies and investments in the year to come. From October through December 2024, we surveyed more than 31,000 consumers in 30 countries to explore opinions regarding a variety of critical issues impacting the automotive sector, including consumer interest in electric vehicles, brand perceptions, connected technology adoption, and mobility as a service.



KEY TRENDS

Vehicle electrification

Discover consumers' engine preferences, motivations for selecting electric vehicles (EVs), favored EV charging locations and charging experiences, concerns in adopting battery electric vehicles, and the designated entities responsible for EV battery recycling.

Explore vehicle electrification

Future vehicle intentions

Explore consumers' perspectives on factors influencing their choice of vehicle brand, their preferred manufacturers, the desired country of manufacture, interest in purchasing vehicles online and obtaining insurance directly from the manufacturer, and various aspects of the purchase experience.

Explore future vehicle intentions

Connectivity

Uncover consumers' perspectives on autonomous vehicles, vehicle connectivity to their smartphones, benefits of artificial intelligence (AI), willingness to pay for connected services, and the entities they trust most to manage connected vehicle data.

Explore connectivity

Mobility as a service (MaaS)

Delve into the metrics on consumers' personal vehicle usage, including the likelihood of retaining it for an extended period, the willingness to replace personal vehicle ownership with MaaS, and the interest in switching from vehicle ownership to vehicle subscription.

Explore mobility as a service

Vehicle electrification

Consumer interest in full hybrids and range-extender technology (that is, no external charging plug) is gaining momentum in several global markets as consumers seek a "best of both *worlds" solution to reduce fuel costs and lower emissions without the need for charging infrastructure.*

Preference for engine type in next vehicle

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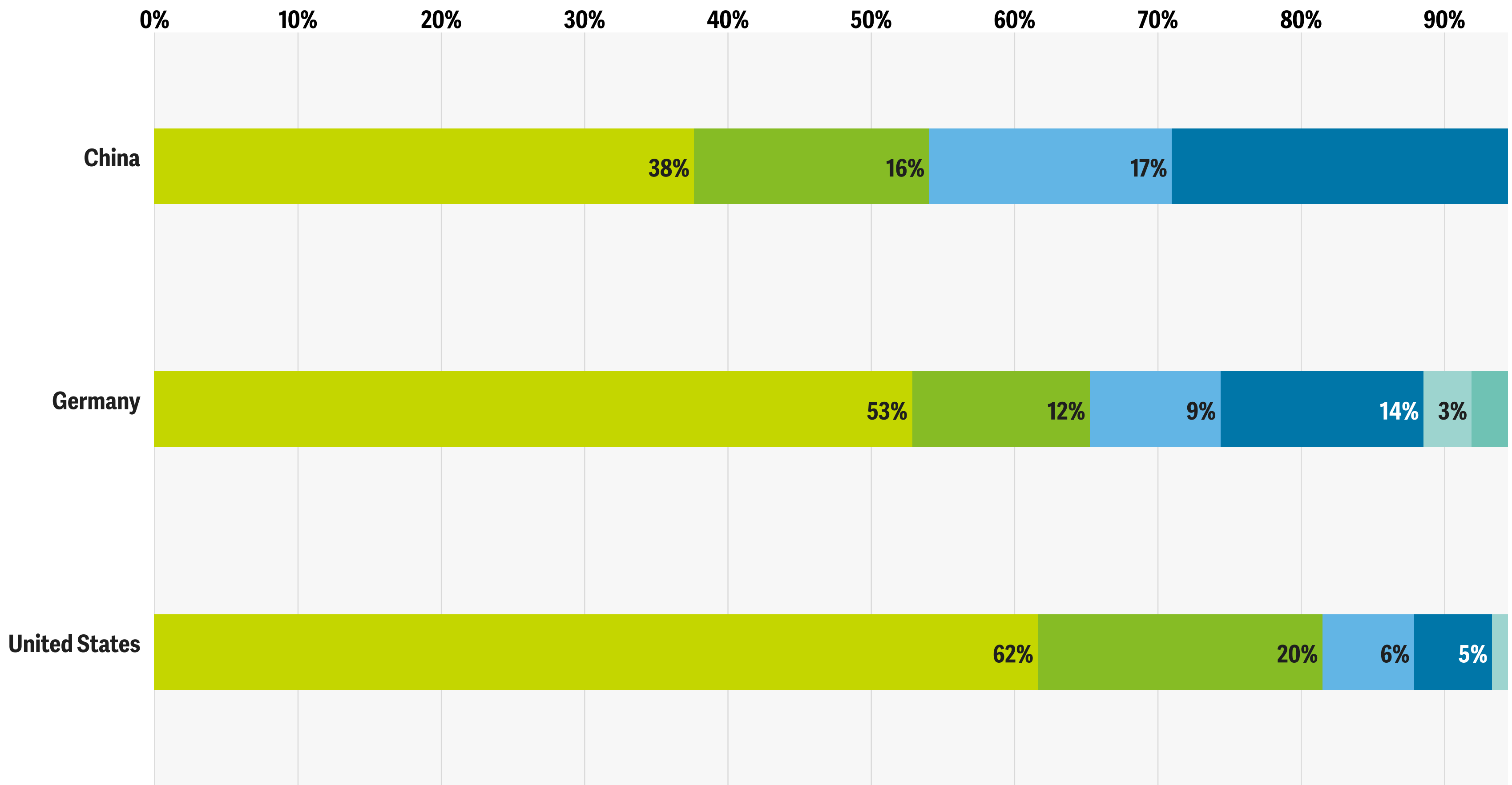

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Engine type preference:
- Internal combustion engine
- Hybrid electric
- Plug-in hybrid electric
- Battery electric
- Other engine options
- Don't know

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Respondents in some global markets continue to steer away from all-battery electric vehicles (BEVs) in favor of internal combustion engines (ICE) and hybrids, which could be due, in part, to lingering affordability concerns.

Reasons for choosing an EV as next vehicle

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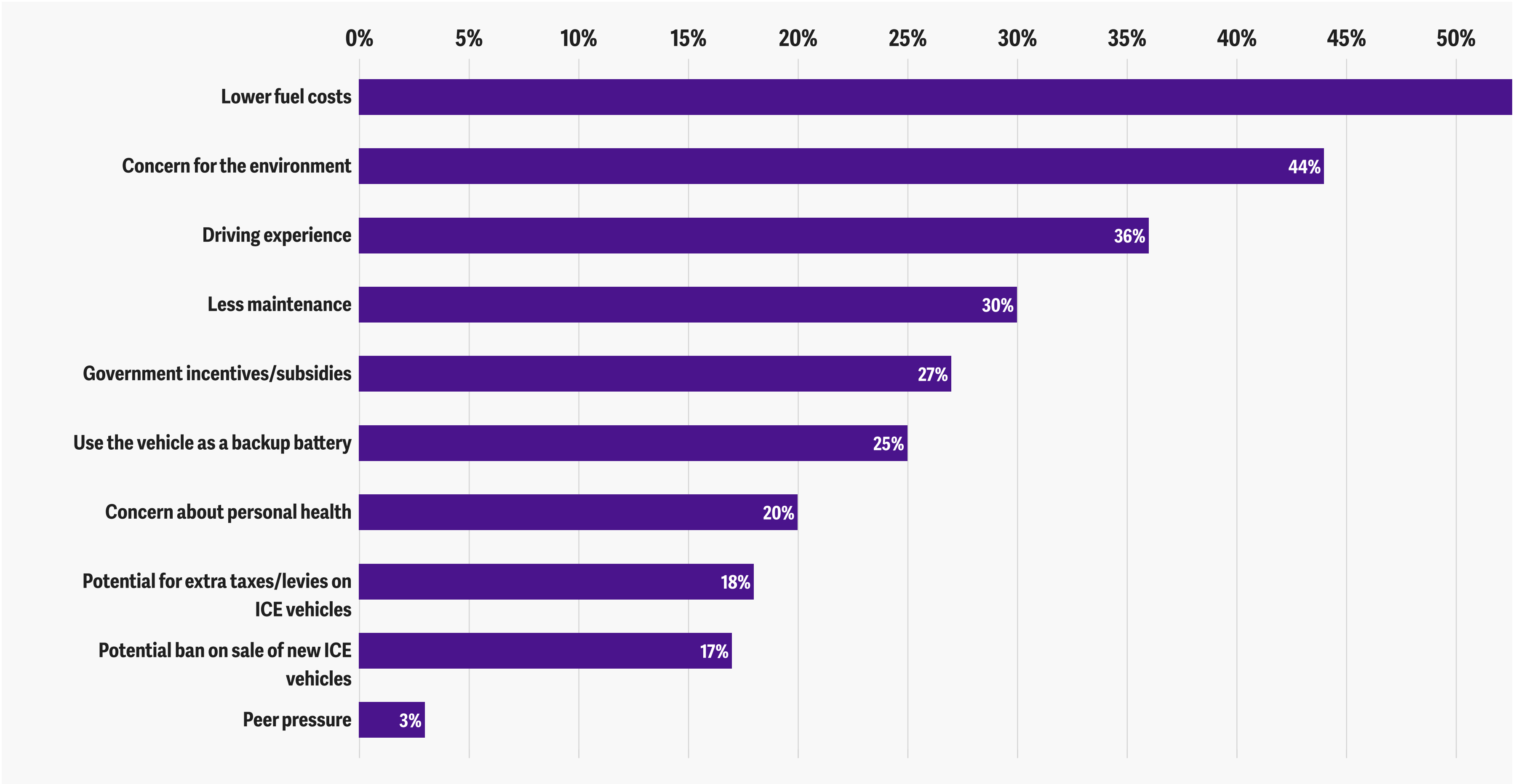

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

Some reasons surveyed consumers intend to acquire an electrified vehicle include a desire to lower fuel costs, concern for the environment, and the driving experience (for example, quieter, better performance).

Preferred price ranges for next vehicle

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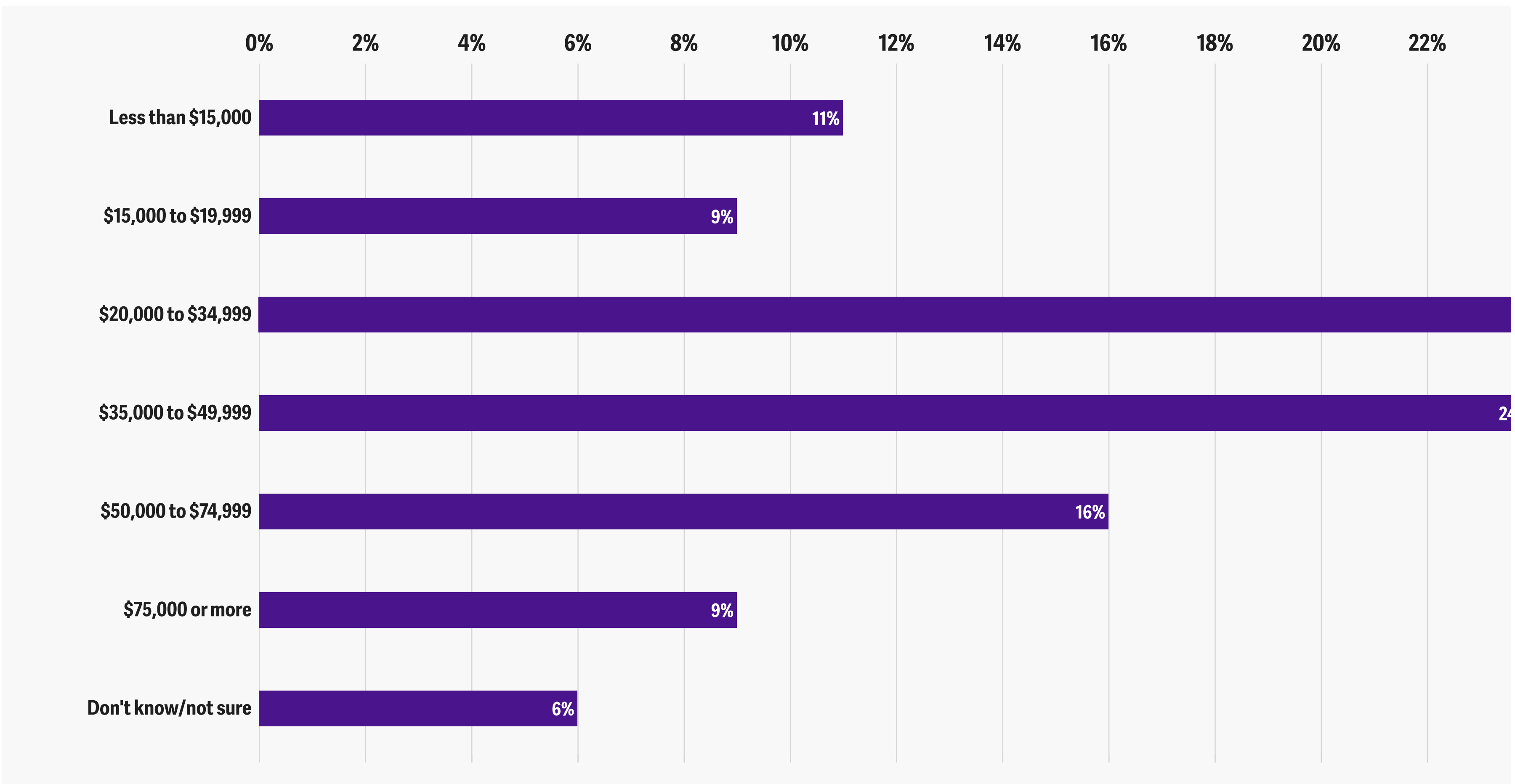

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS
Affordability remains a major issue for consumers in many markets around the world.

Preferred charging locations for EVs

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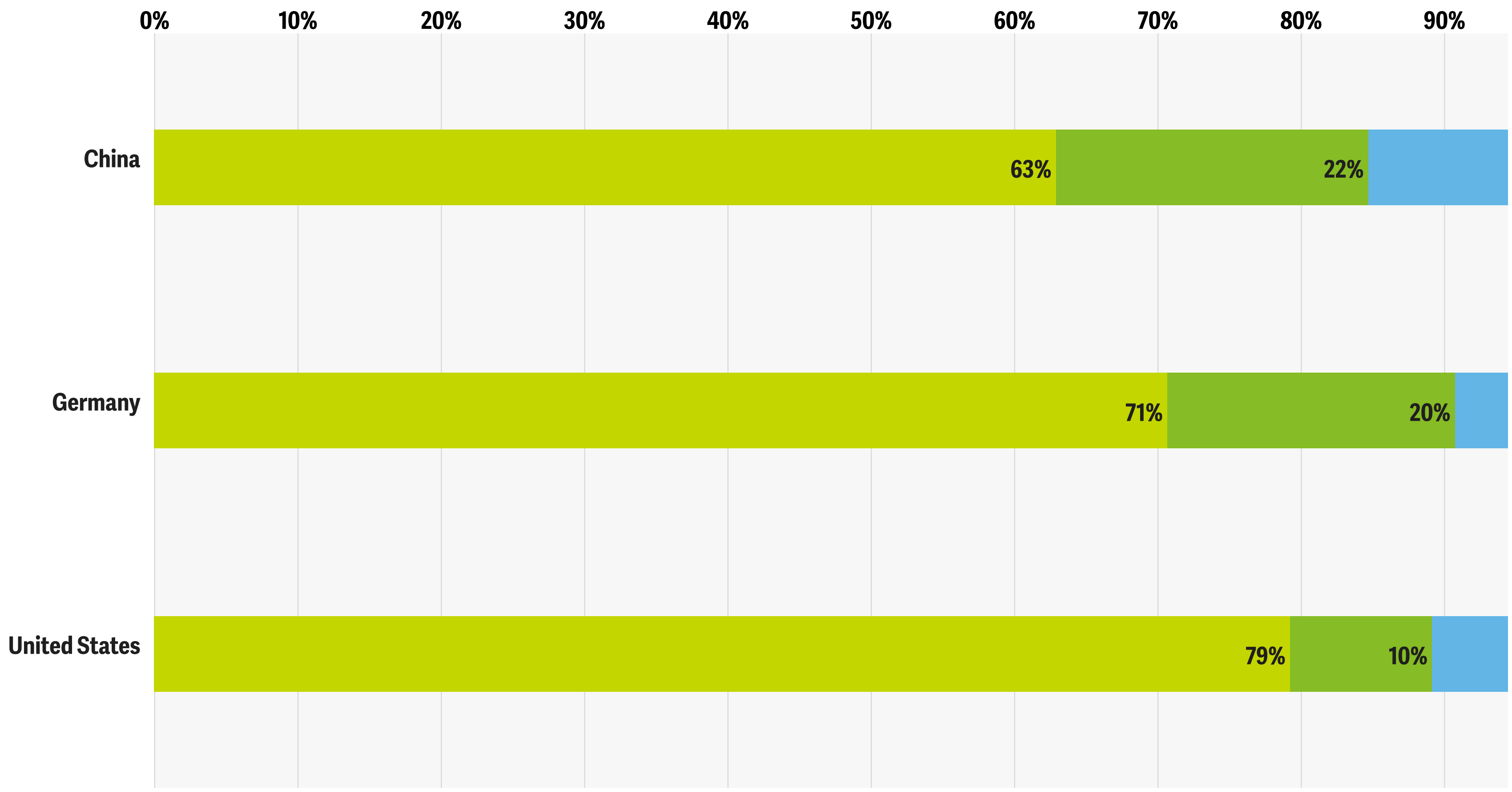

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Preferred charging location:
- Home
- Public charging station
- Work
- Other

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS
The push to create public charging capacity may be somewhat overstated in many markets, as a strong majority of EV intenders surveyed plan to charge their vehicle at home.

Reasons for not charging EVs at home

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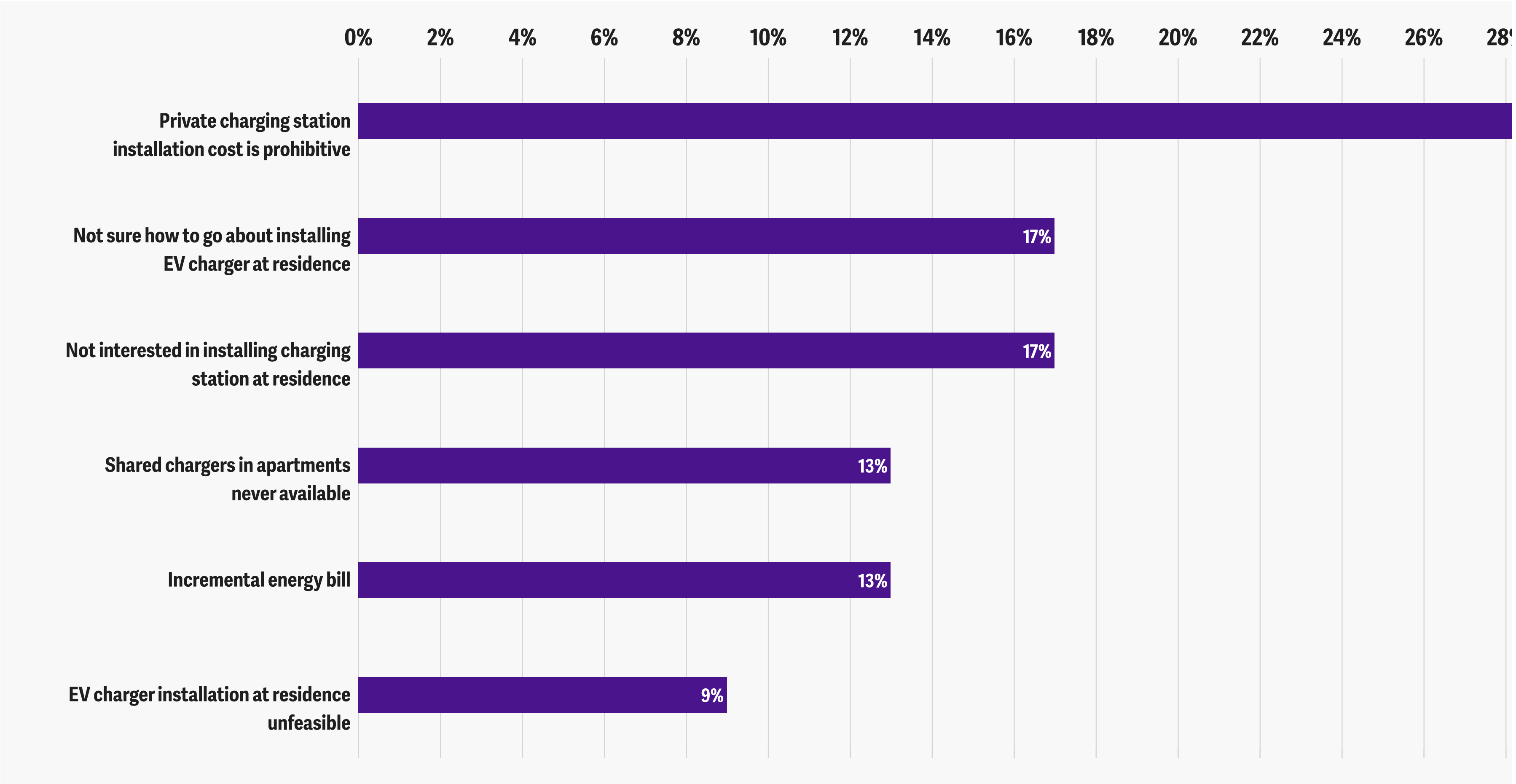

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Country:

United States

Age: All

Gender: All

KEY TAKEAWAYS

Consumers who do not plan to charge their EVs at home often cite challenges such as the installation cost, and the incremental increase in energy bills. Additionally, those living in shared spaces, such as apartments, highlight issues related to the use of shared chargers.

Preferred public charging locations for EVs

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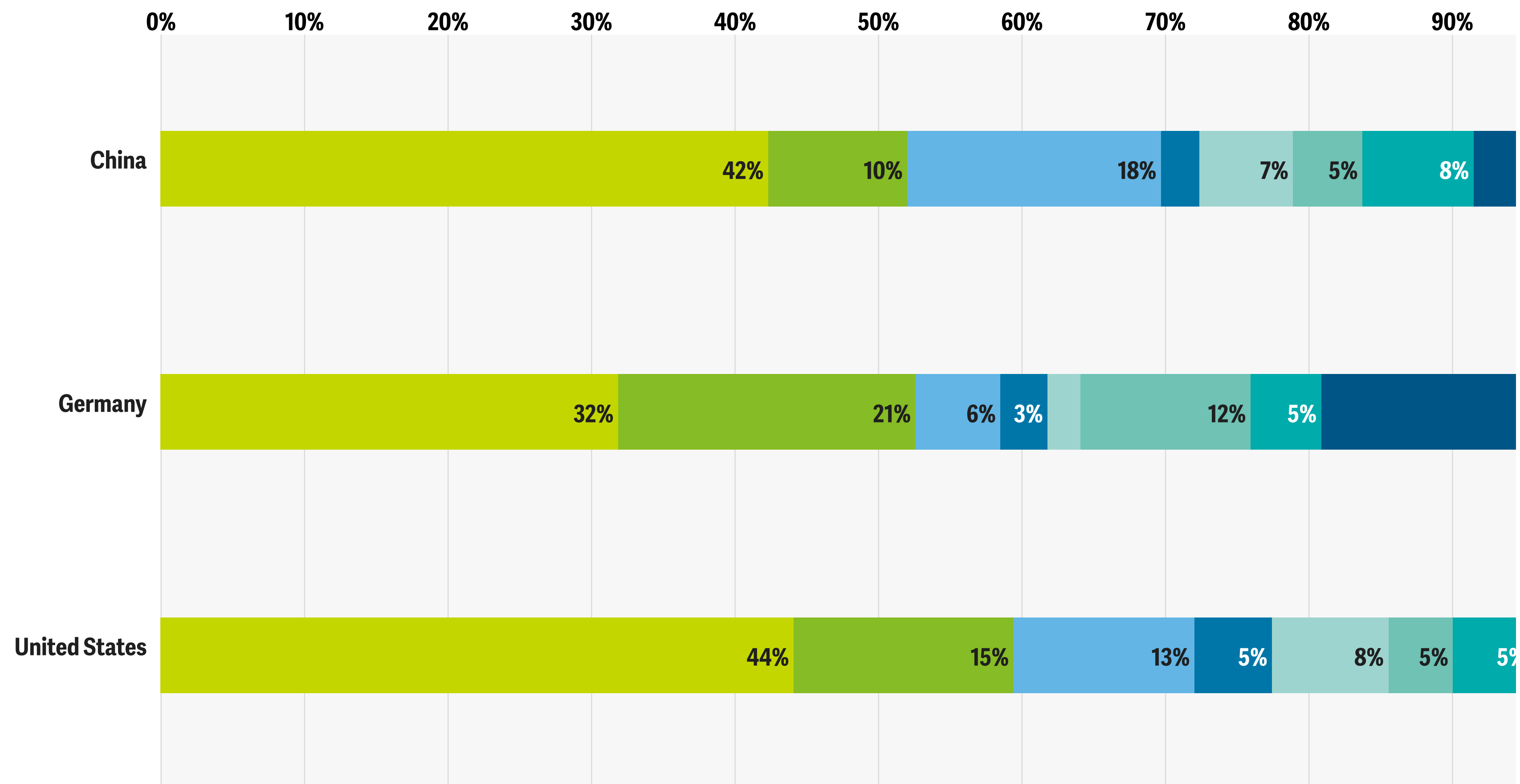


Preferred public EV charging location:

- Dedicated EV charging station
- Traditional gas station with EV chargers
- Parking lot
- Hotel
- Vehicle dealership
- Retail outlet/mall
- Community/public building
- On-street parking
- Other

Countries: China, Germany, United States

Age: All

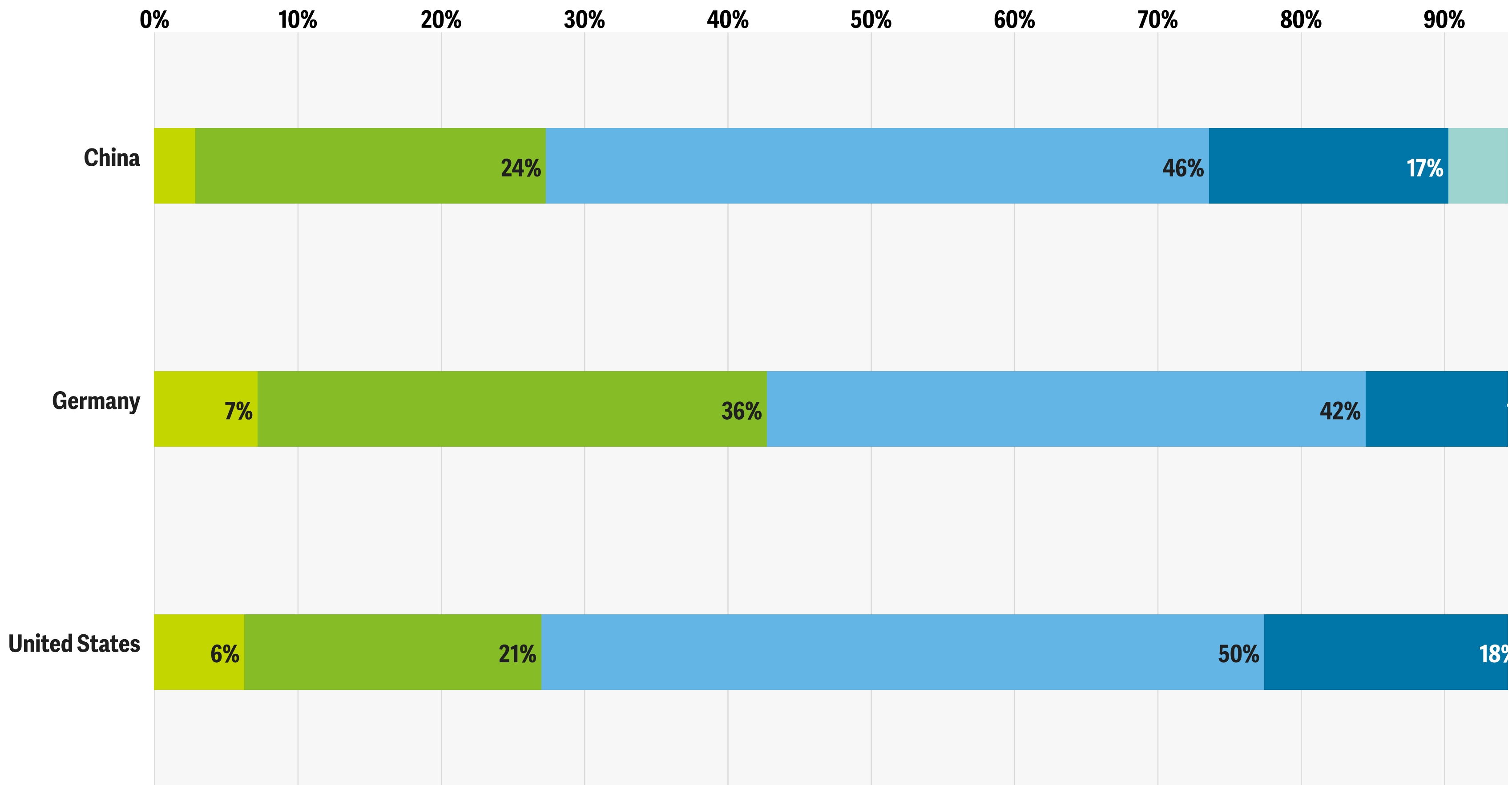
Gender: All

KEY TAKEAWAYS

Consumers surveyed in most global markets would prefer to charge their EVs at a dedicated charging facility, perhaps reflecting a perception that these locations may offer more access to chargers equipped with the latest technology.

Expected charging time at public stations for EVs

Filter data



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Expected charging time:

- 10 minutes or less
- 11 to 20 minutes
- 21 to 40 minutes
- 41 to 60 minutes
- More than 60 minutes

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

A long-standing industry assumption that EV charge times need to be at par with fossil fuel fill-ups may be overstated, as surveyed consumers in most markets are willing to wait up to 40 minutes.

The most important aspect of an EV charging experience

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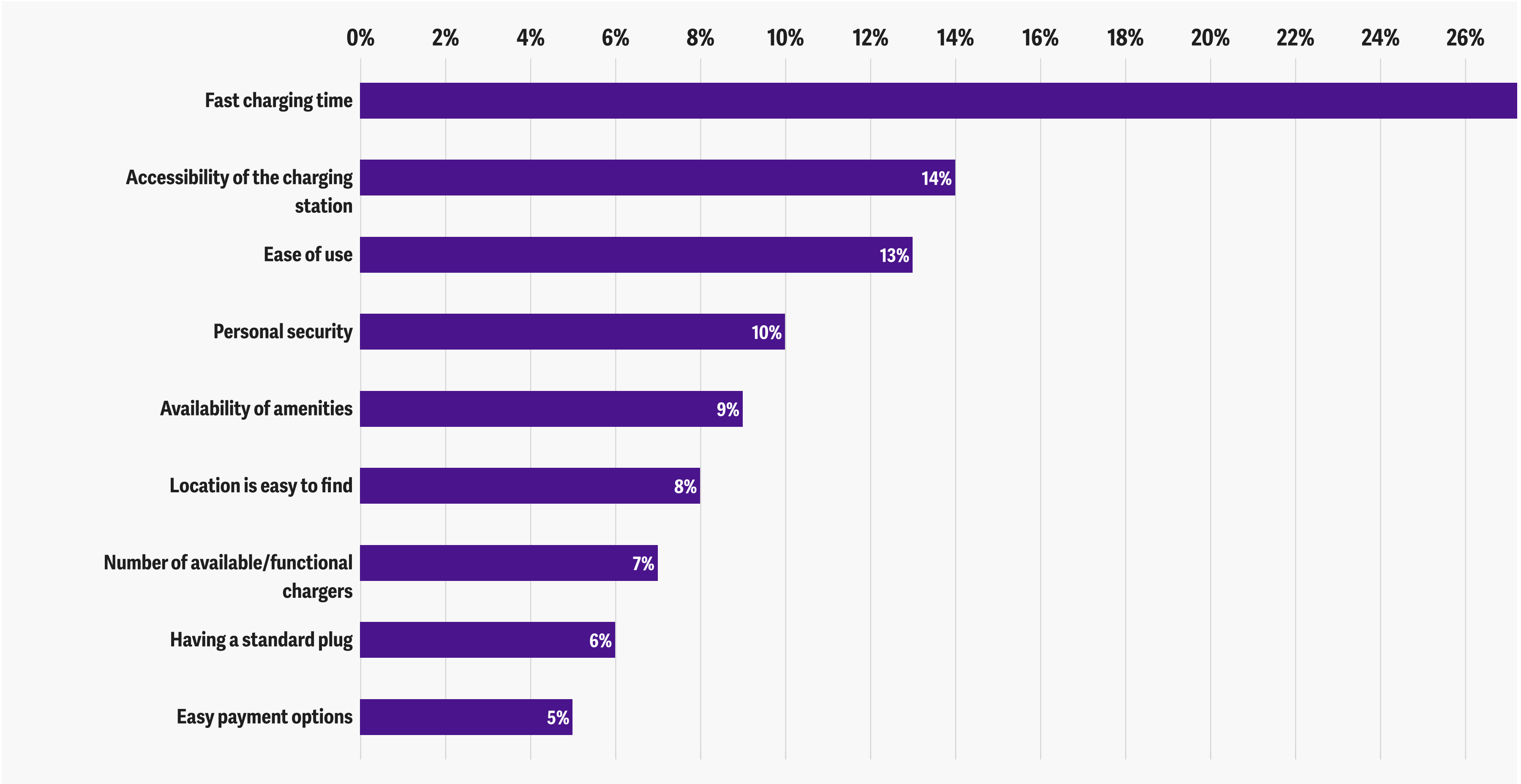

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

Overall, consumers surveyed across global markets agreed that the most important aspect of an EV charging experience is the speed of charging (fast charging times), eclipsing other factors such as accessibility, amenities, security, and even the number of available or functional plugs.

Top concerns regarding all-battery-powered EVs

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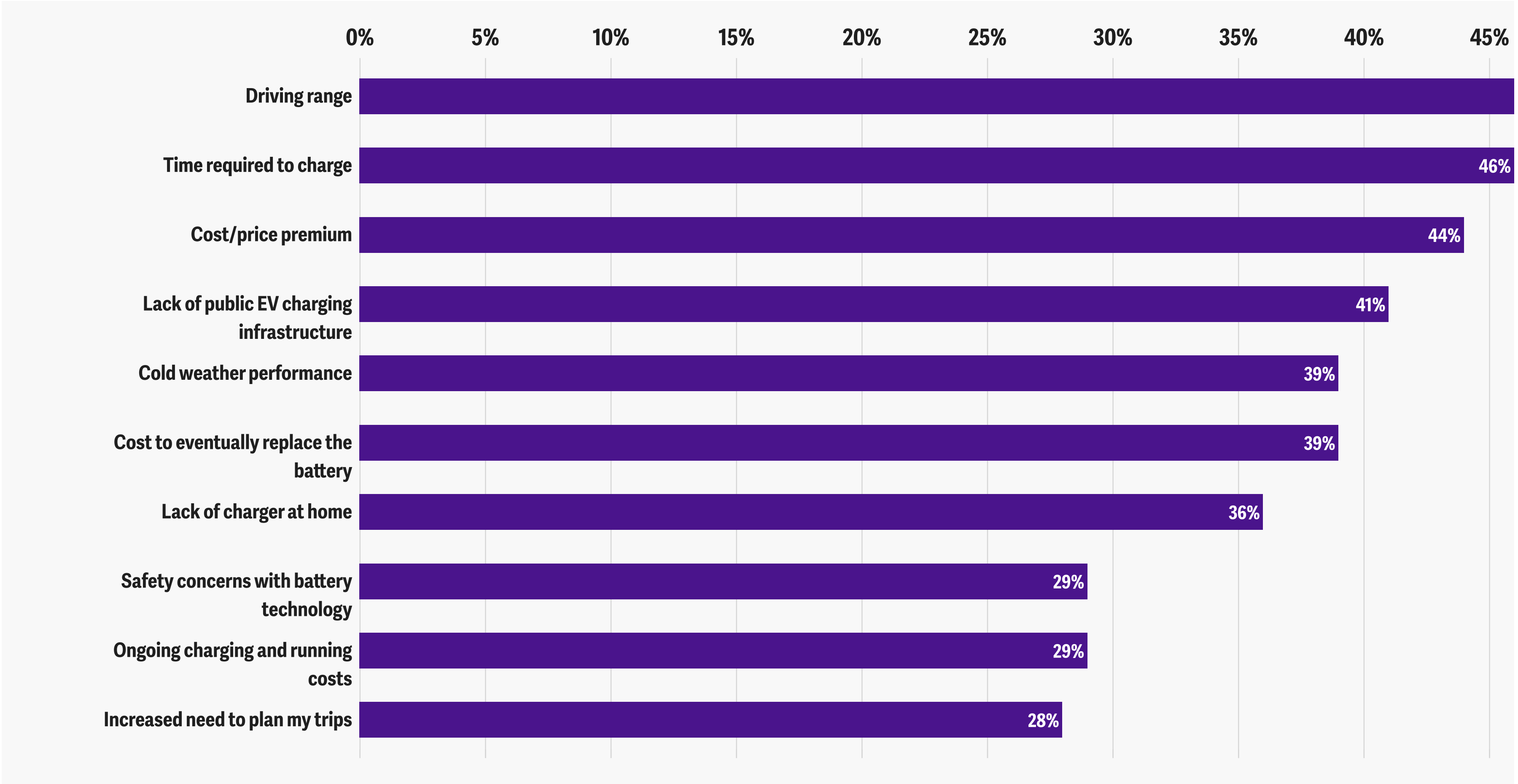

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

When it comes to BEVs, consumers surveyed are generally most concerned about charging duration, range anxiety, cost, lack of public charging infrastructure, and battery safety.

Entity responsible for collecting, storing, and recycling EV batteries after their useful lives

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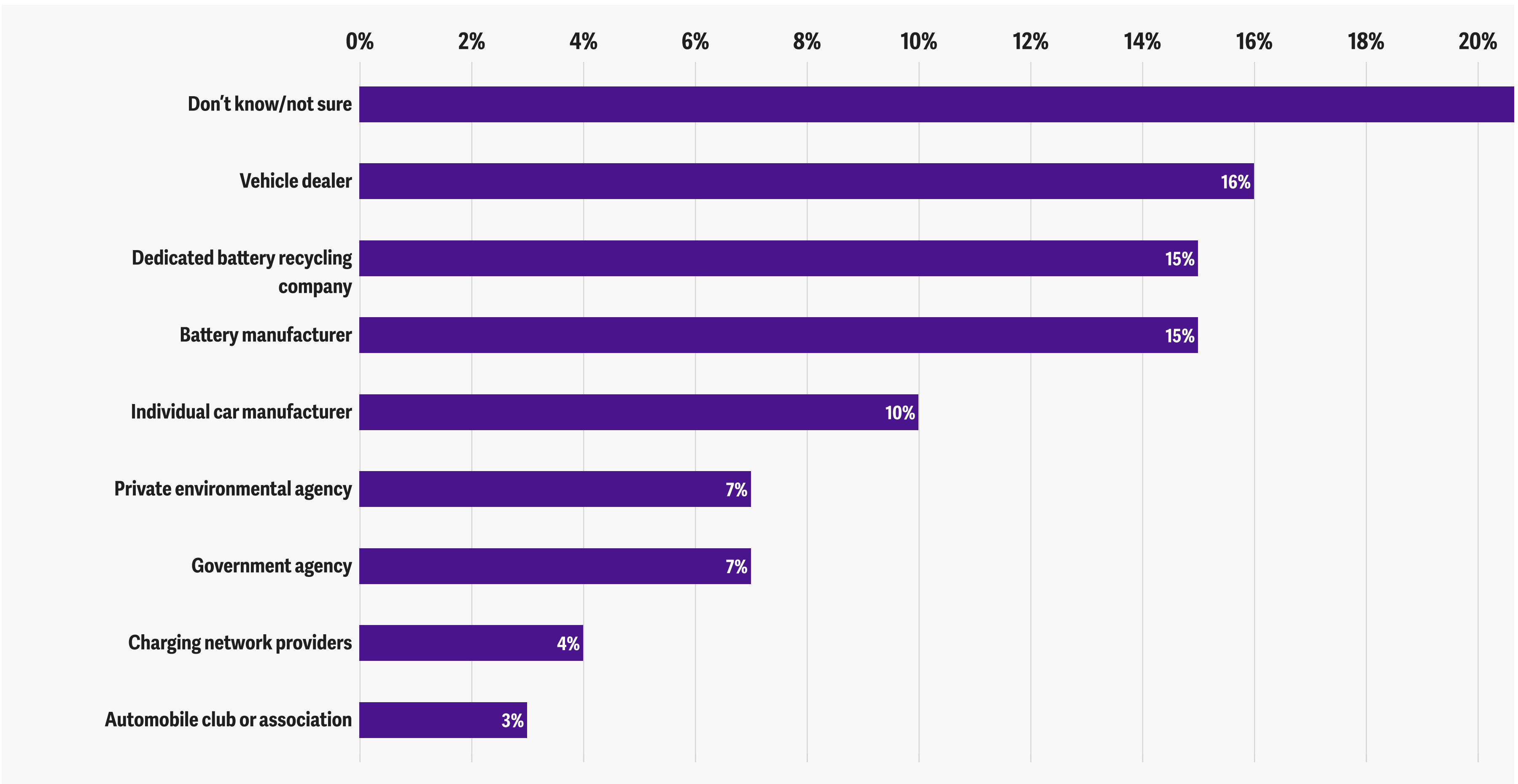

Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

The global end-of-life EV battery value chain remains relatively nascent even as the number of EVs on the road continues to increase (as per the International Energy Agency's Global EV Outlook 2024), and consumers surveyed are split in terms of who they think should be responsible for battery stewardship.

Future vehicle intentions

Before driving their new vehicles off the showroom floor, consumers are likely to evaluate various factors such as brand-specific attributes, whether the brand is from a domestic or foreign original equipment manufacturer (OEM), and the vehicle's manufacturing location. Additionally, OEMs might explore the possibility of engaging directly with consumers for vehicle sales and insurance, as there is a growing openness to this model in certain markets.

The most important factors driving the choice of brand for next vehicle

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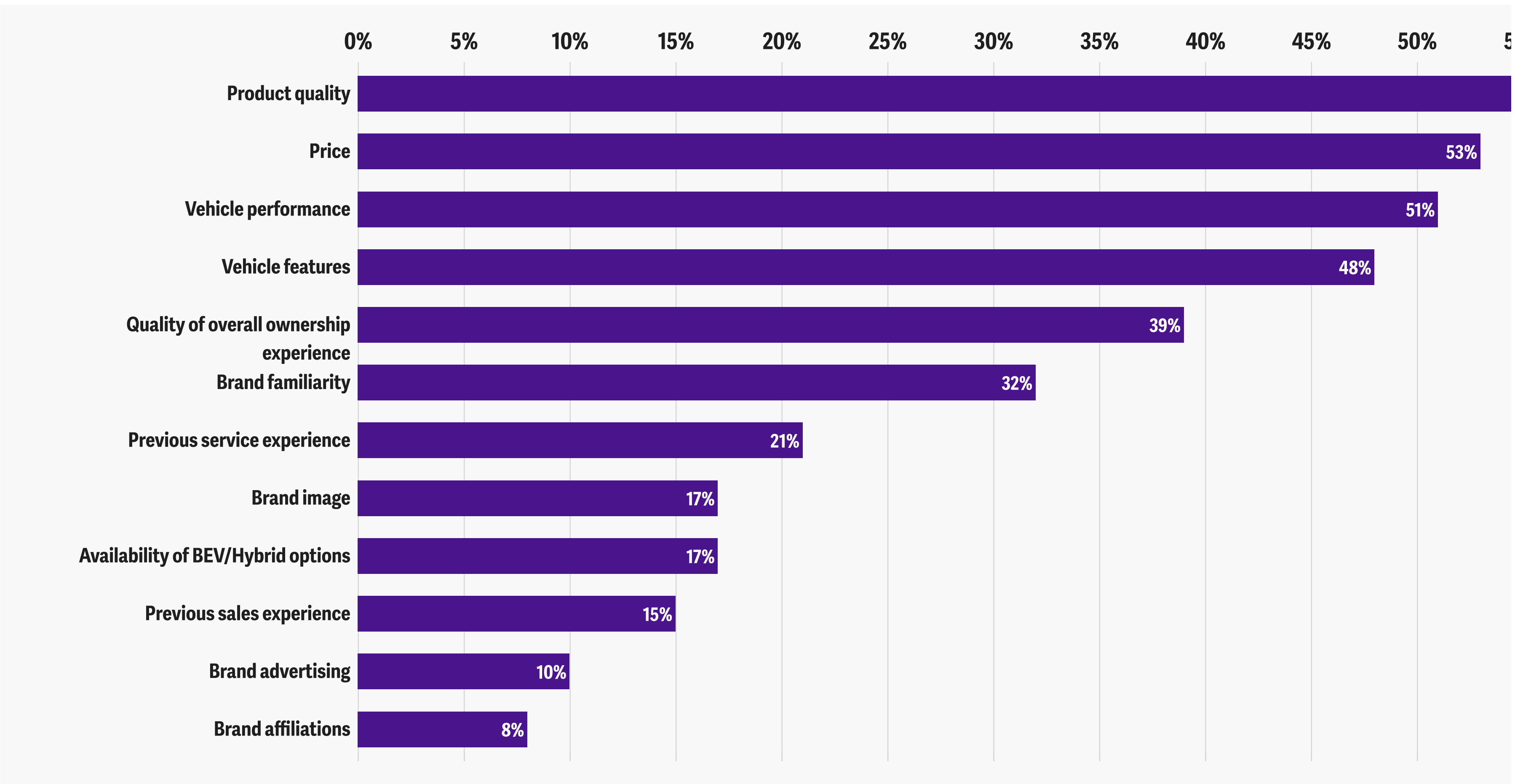

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

Depending on the market, consumers surveyed highlighted price, product quality, or performance as the top considerations when thinking about their next vehicle brand.

Preferred organizations for next vehicle purchase

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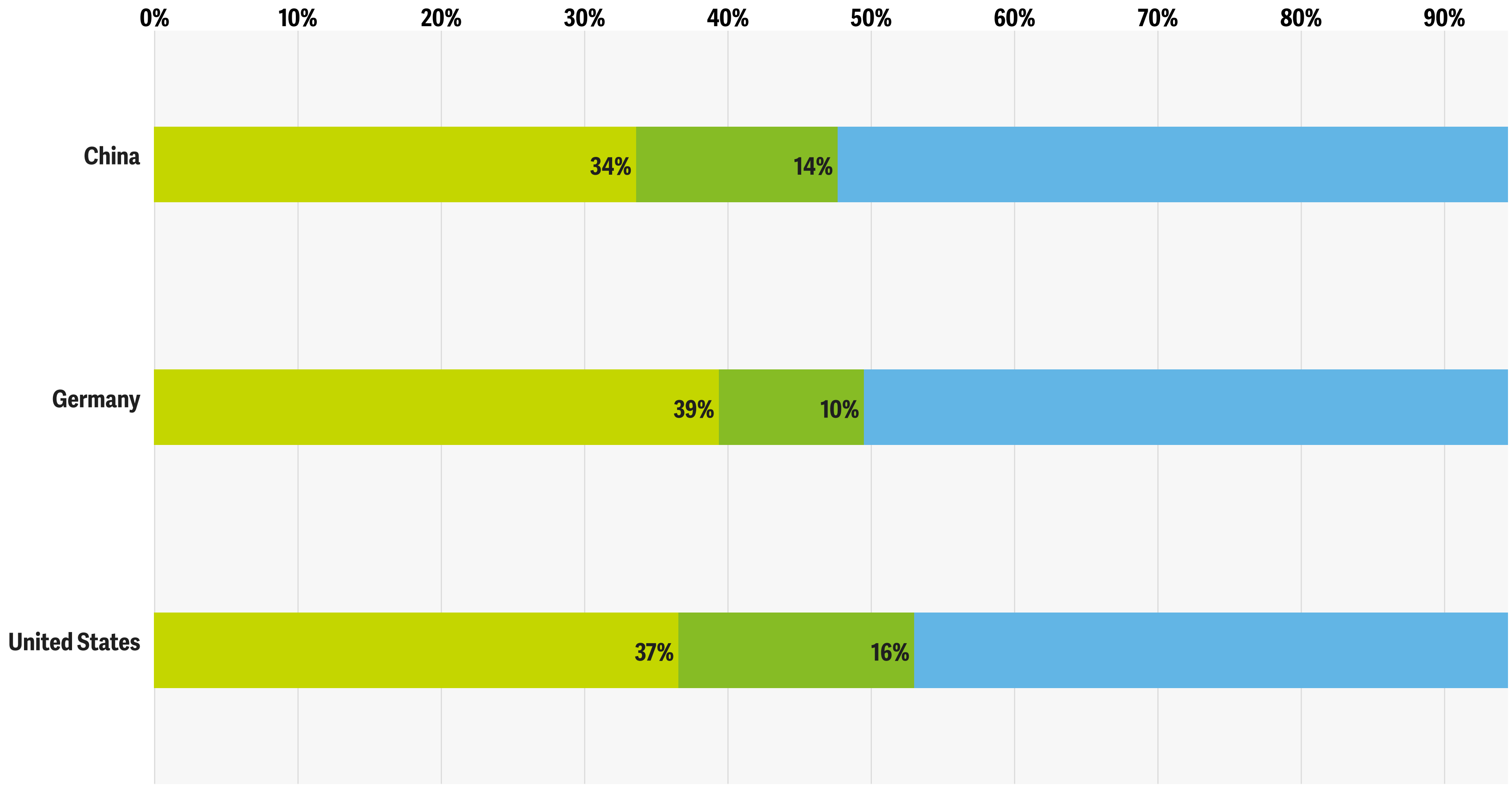

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Preferred manufacturer: Domestic manufacturer/brand, Foreign manufacturer/brand, Doesn't matter

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Brand affinity for domestic automakers is strongest among consumers surveyed in Japan, while it is least prevalent in Southeast Asia and the United Kingdom, underscoring the complexity and diversity of the competitive landscape across global markets.

Importance of the next vehicle to be manufactured locally (percentage of important or very important)

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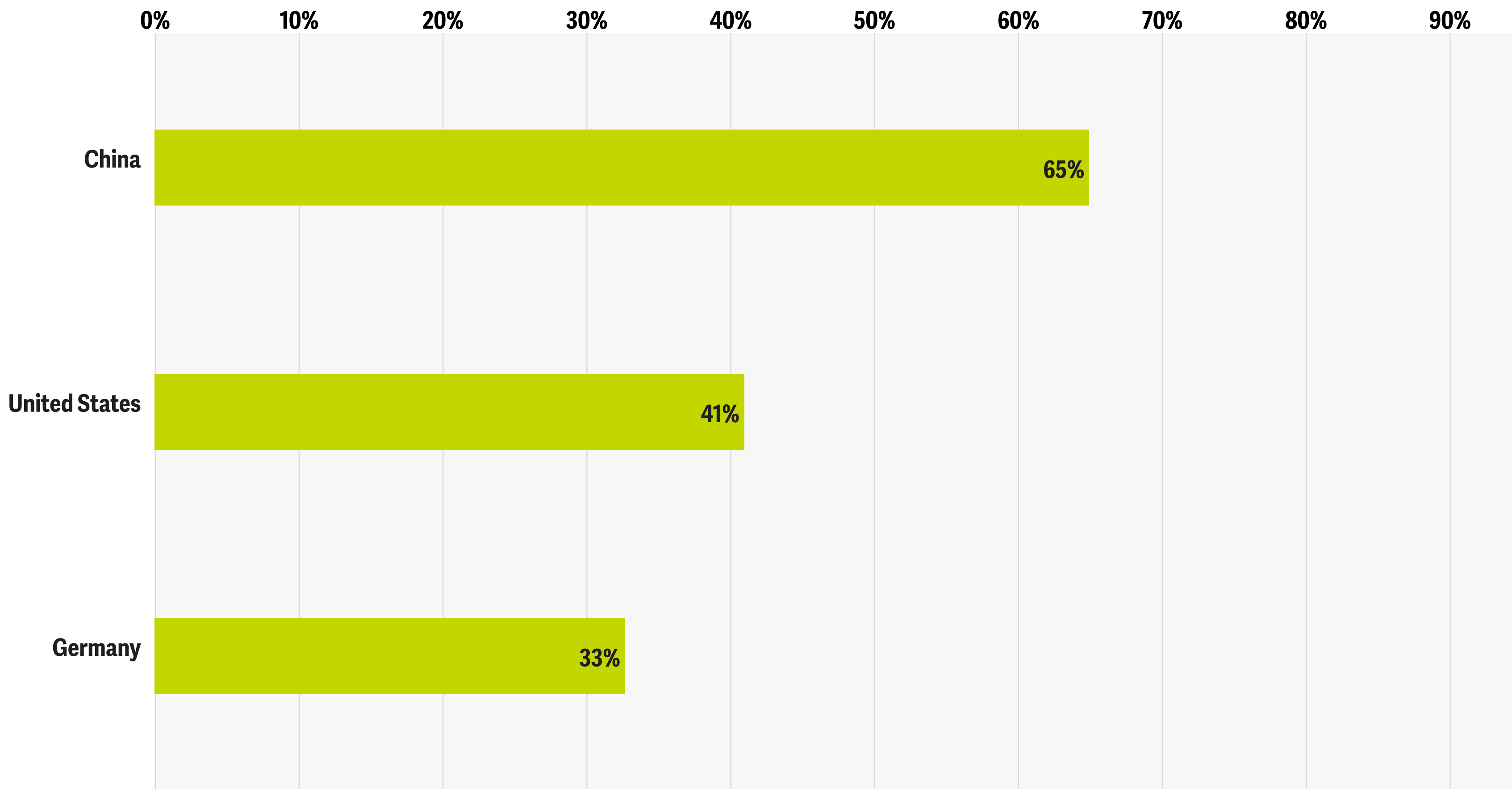

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Importance: Important

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

As global trade policies shift, encouraging a more regional approach to vehicle manufacturing footprints and supply chains, consumer sentiment differs among respondents when it comes to whether local manufacturing is an important criterion for choosing a vehicle.

Interested in purchasing a vehicle directly from the manufacturer through an online process (percentage of somewhat or very interested)

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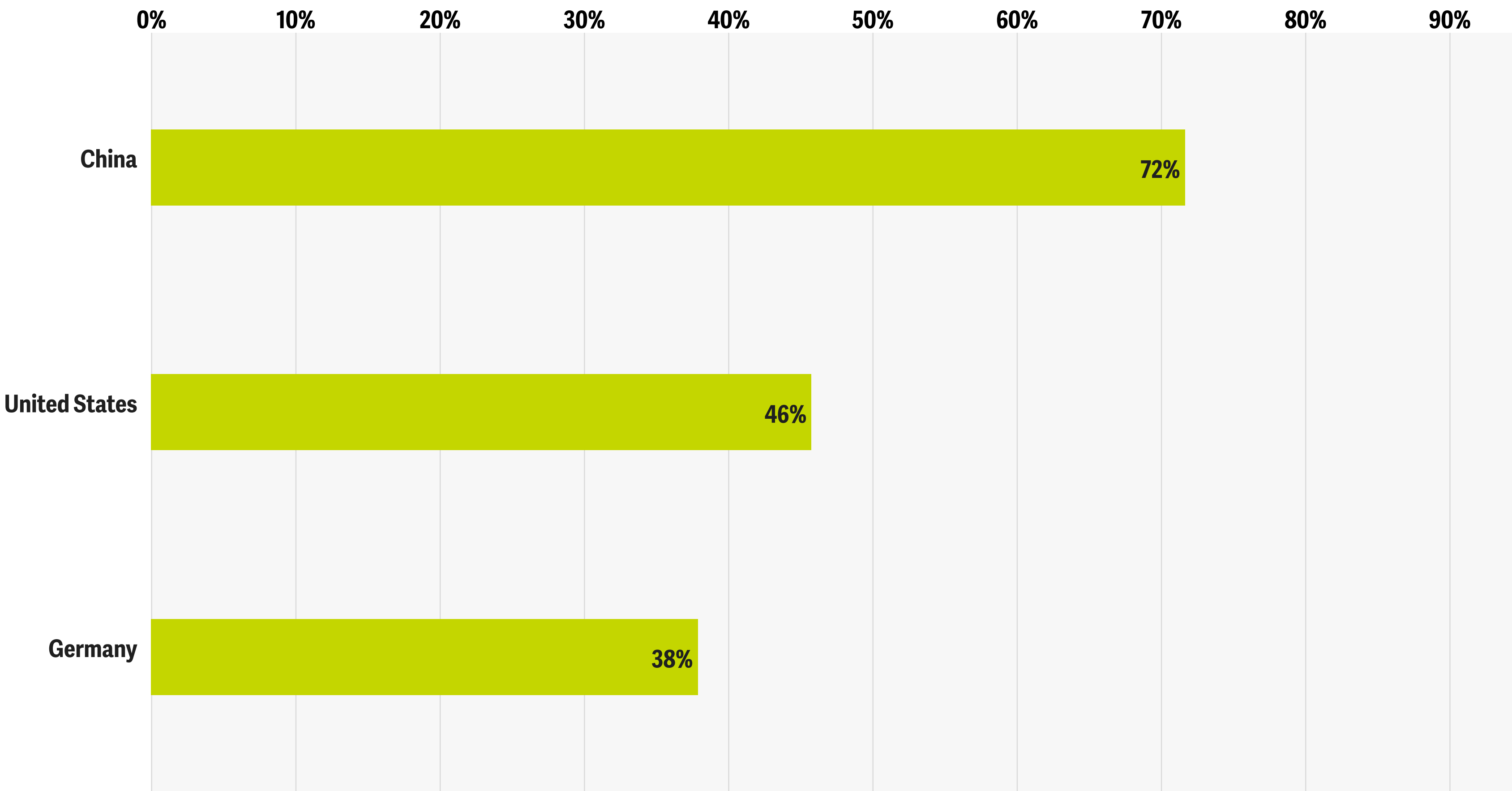

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Level of interest: Interested

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

As some OEMs continue to explore the potential for "agency" retail models, consumers surveyed in India and China are more receptive to the concept of buying a vehicle directly from the manufacturer compared to consumers in Japan.

Interested in purchasing insurance directly from the manufacturer (percentage of somewhat or very interested)

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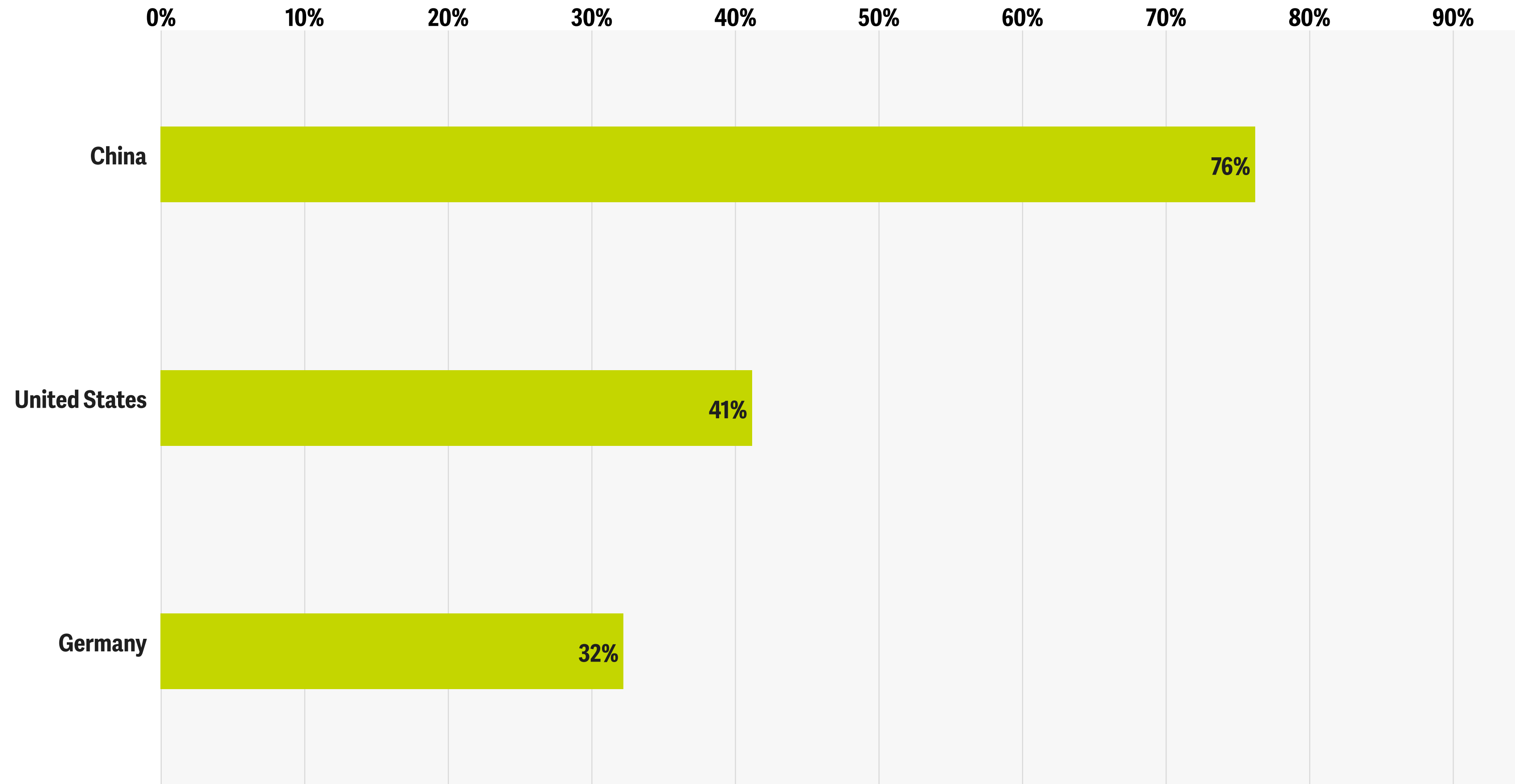

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Level of interest: Interested

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Consumers surveyed in some markets are signaling a high level of interest in purchasing vehicle insurance directly from the manufacturer.

Level of agreement on various aspects of the purchase experience (percentage of somewhat or strongly agree)

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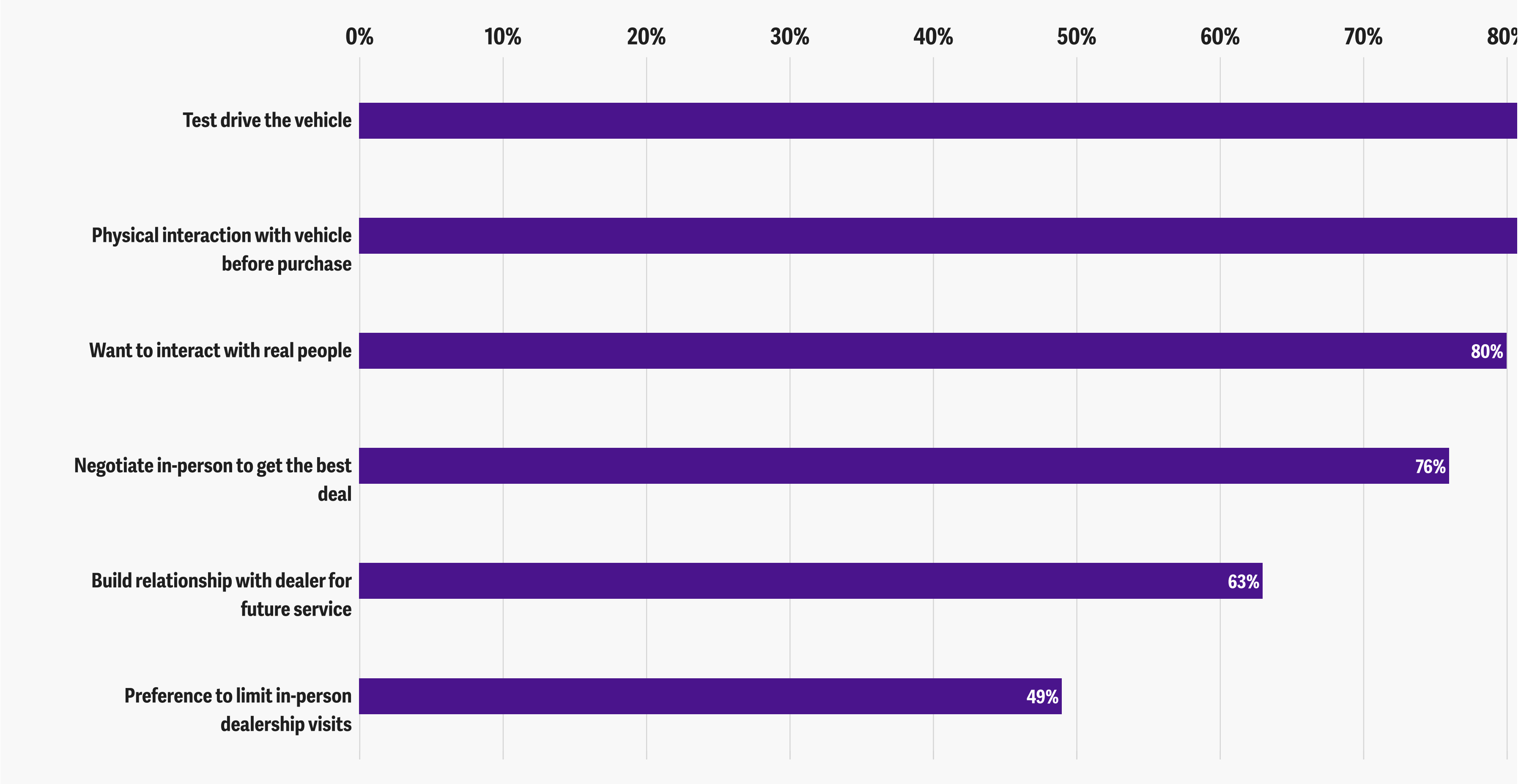

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

It may be difficult to move to an entirely online purchase process in many markets, as consumers surveyed say they need to physically interact with the vehicle before they buy it.

Connectivity

An evolving view of the regulatory environment governing the development of autonomous technology in some global markets may ease the deployment of self-driving vehicle fleets for both consumer and commercial applications, but more than half of surveyed consumers in India, the United Kingdom, and the United States remain concerned about their safety. Having said that, the integration of artificial intelligence into vehicle systems to enable self-driving features is seen as largely beneficial, particularly in Asia-Pacific markets.

Consumers concerned with autonomous vehicles

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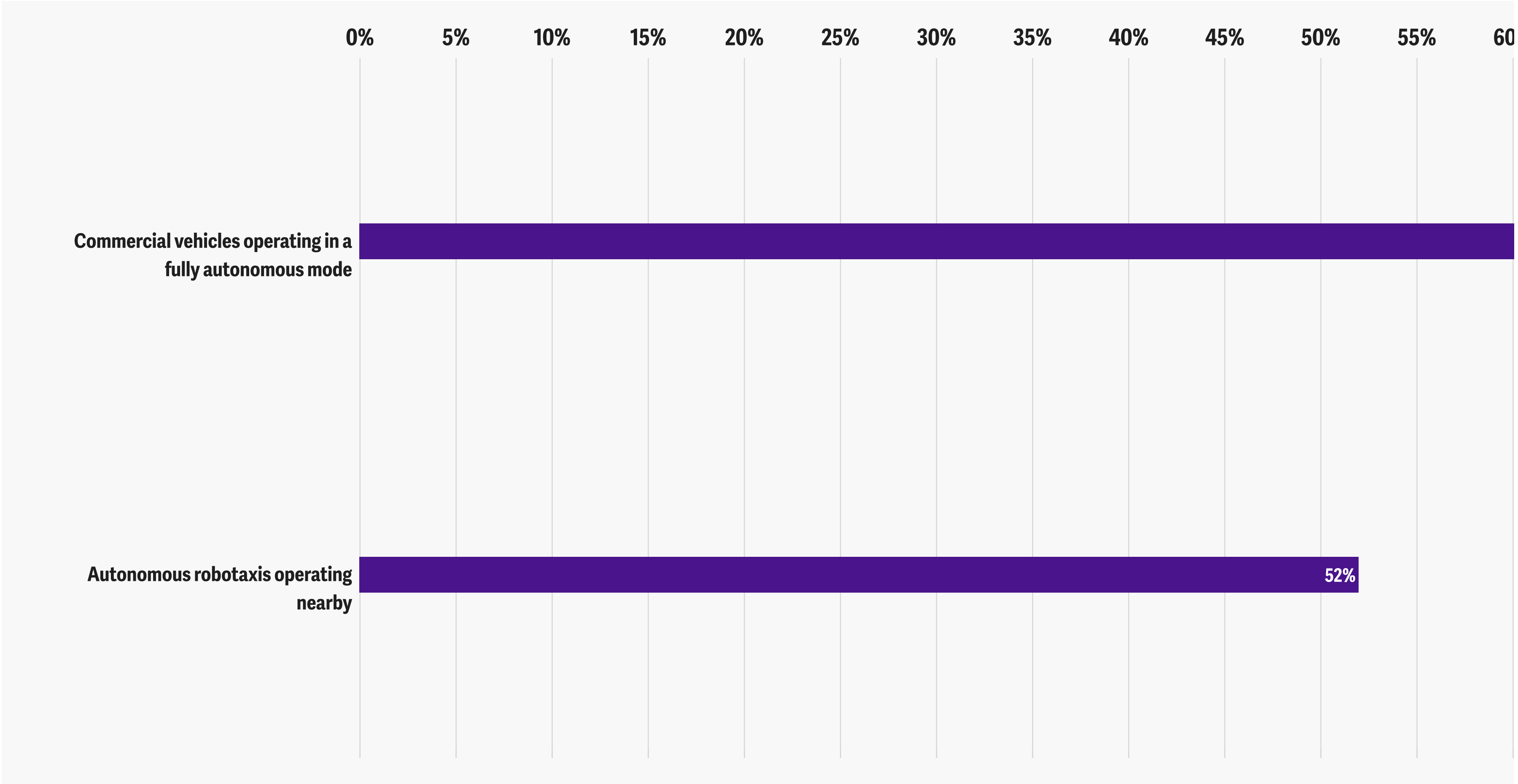

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

Consumers surveyed in both India and the United Kingdom are more concerned with the idea of an autonomous vehicle fleet when compared to those in Germany, Japan, or China.

Importance of vehicle connectivity with smartphone (percentage of somewhat or very important)

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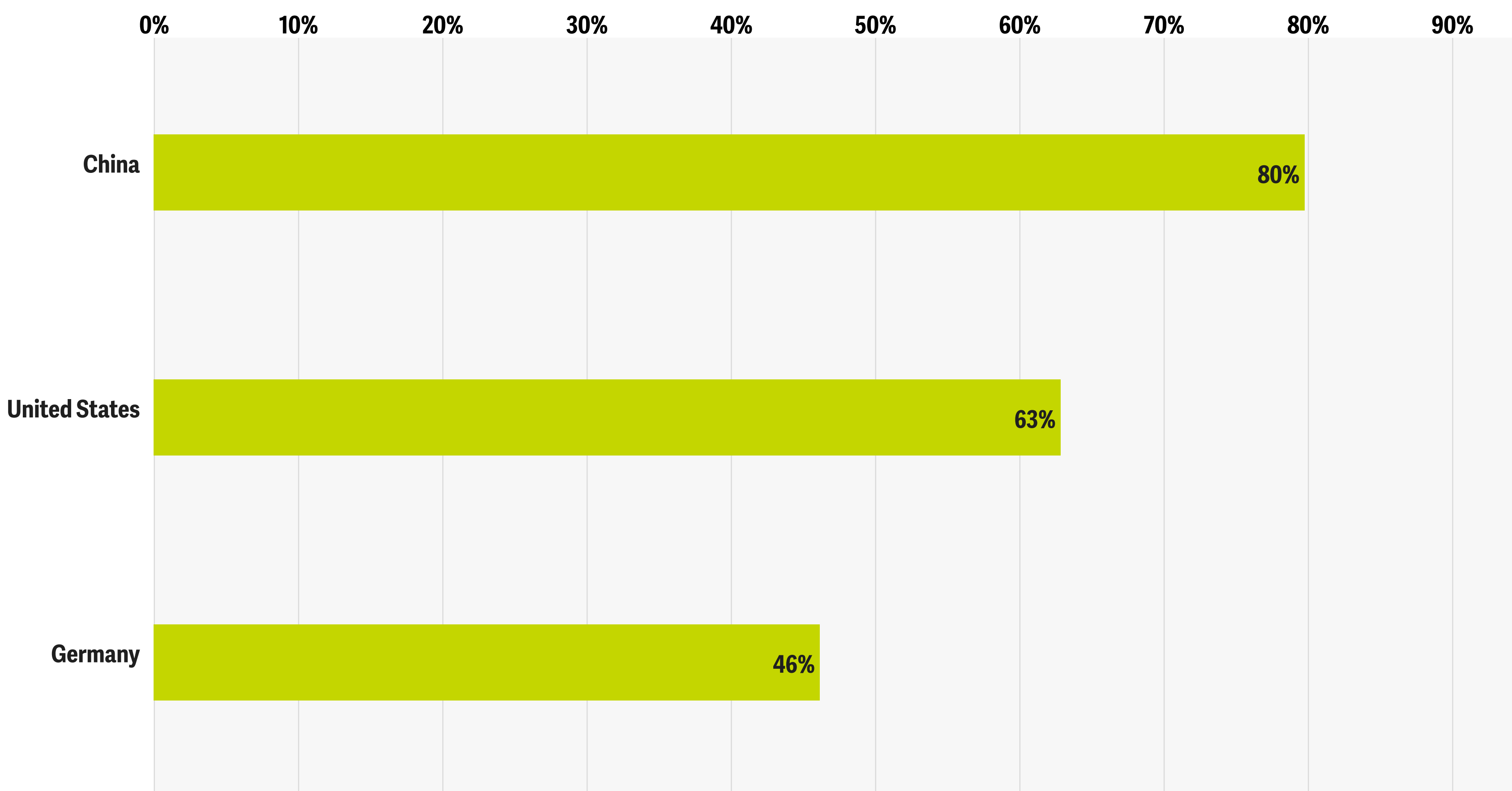

Importance: Somewhat important & Very important

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

At a time when some car manufacturers are attempting to introduce their own connected service ecosystems, surveyed consumers in some global markets still believe their next vehicle should retain the ability to connect with their smartphone.

Most trusted entity for managing connected vehicle data

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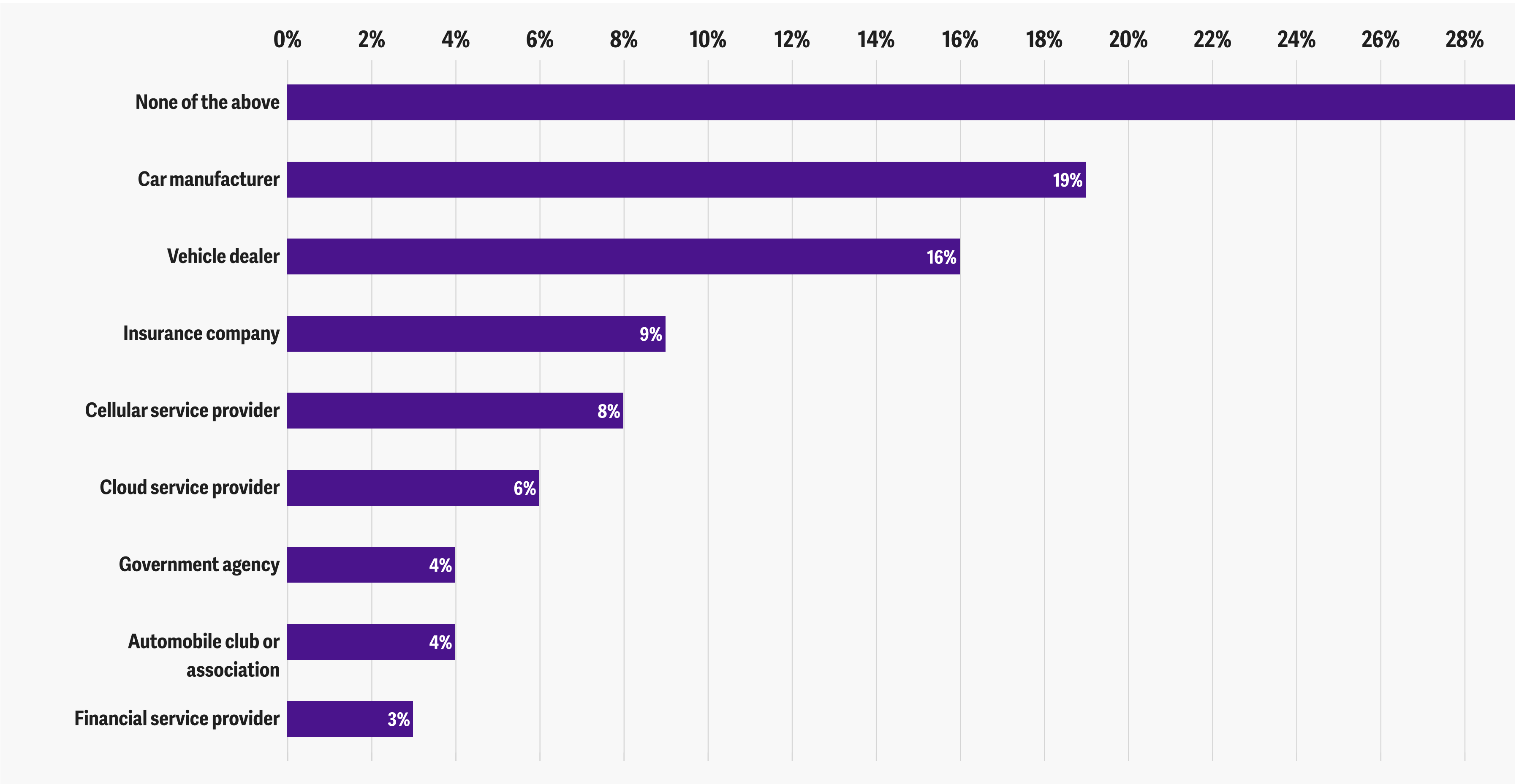

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

In most markets surveyed, consumers trust car manufacturers the most when it comes to managing connected vehicle data. At the same time, most consumers surveyed in Germany, the United Kingdom, and the United States do not trust any of the listed entities, which could represent a challenge for companies looking to monetize connected services.

Willingness (percentage of somewhat or very willing) to pay extra for connected vehicle services

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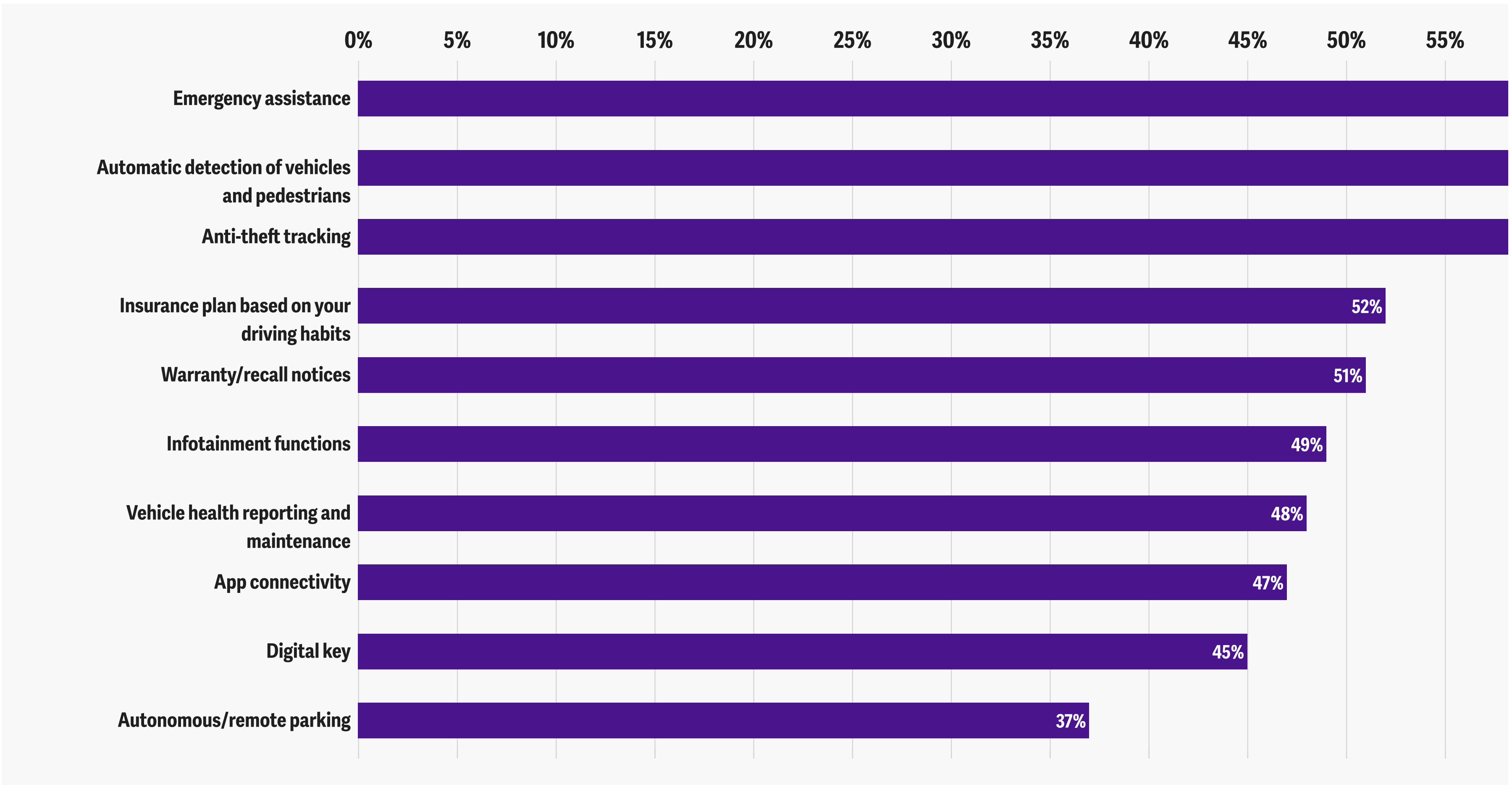

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Country:
United States

Age: All

Gender: All

KEY TAKEAWAYS

Though it could mean sharing personal identifiable information with manufacturers or other third parties, a greater percentage of consumers surveyed in developing markets are interested in connected vehicle features.

Addition of artificial intelligence to vehicle systems

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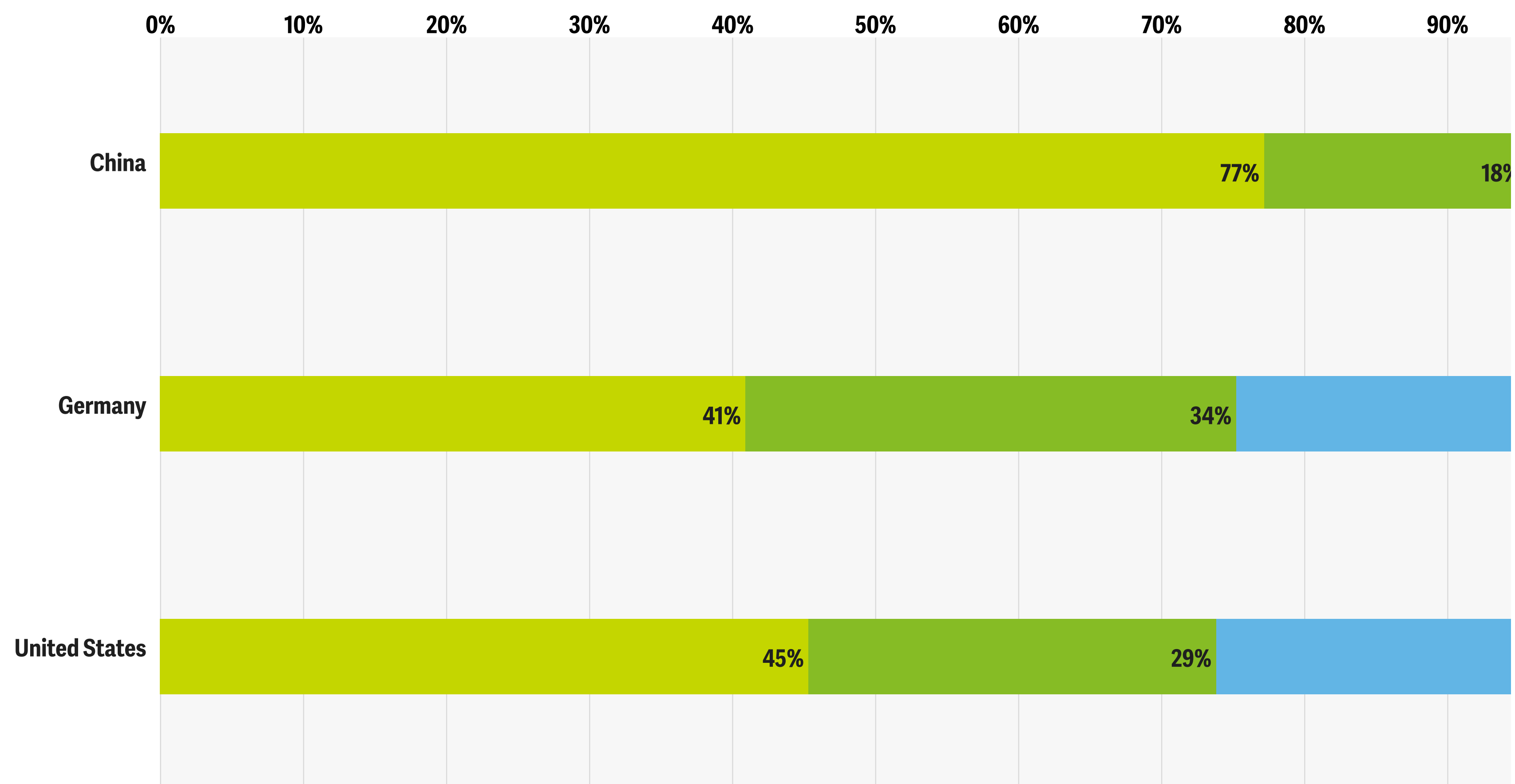

Opinion on AI in vehicle systems:
- Beneficial
- Neutral
- Not beneficial

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

More than three-quarters of consumers surveyed in India and China believe the addition of artificial intelligence to vehicle systems is beneficial. On the other hand, a quarter of consumers surveyed in Germany, the United States, and the United Kingdom remain skeptical about the technology.

Mobility as a service (MaaS)

A relatively high frequency of vehicle use persists in many markets, but many younger consumers surveyed are interested in MaaS over ownership.

Frequency of driving personal vehicles

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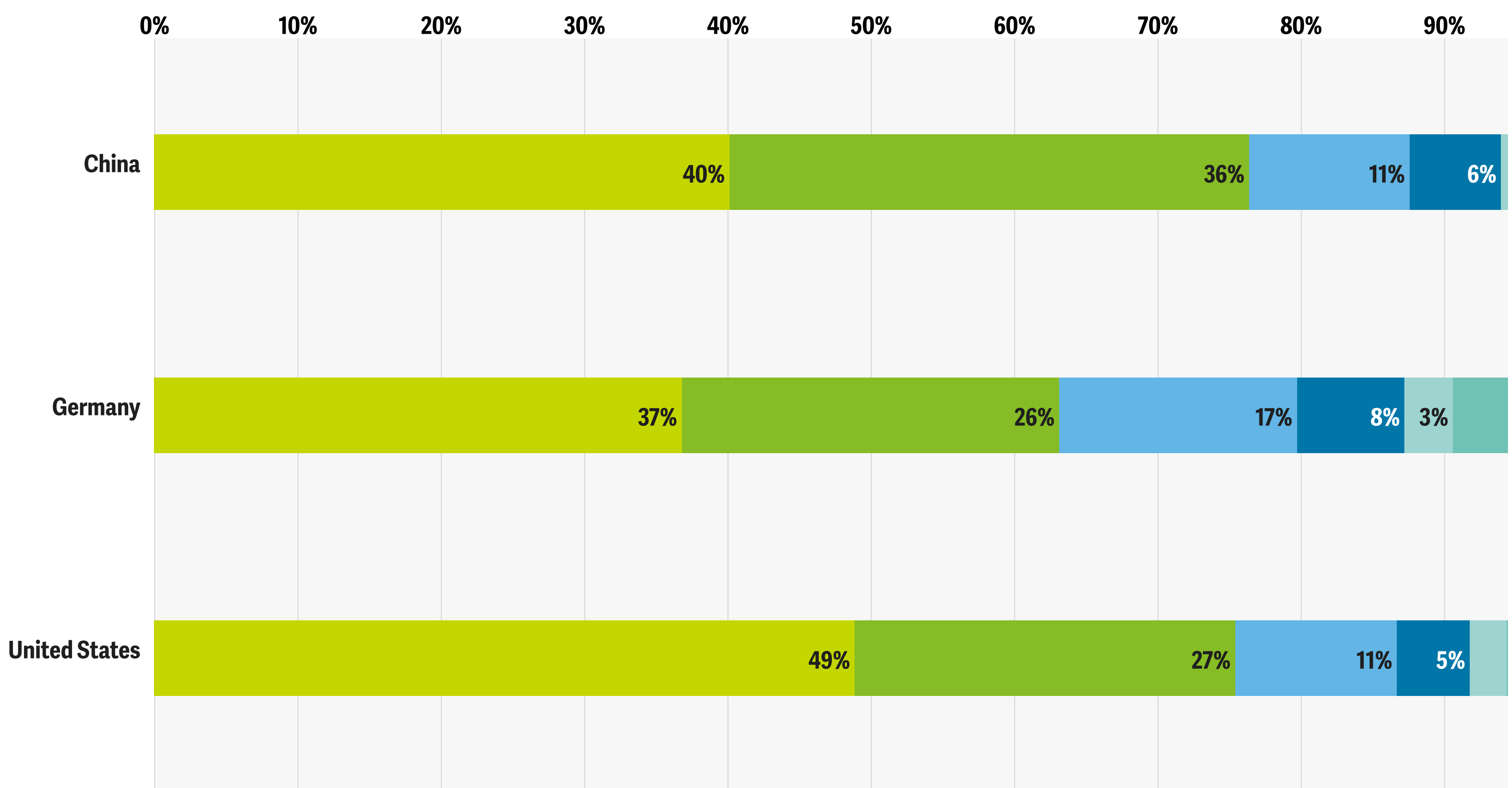

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Frequency:
- Everyday
- 3-4 times per week
- 1-2 times per week
- 2-3 times per month
- Once a month
- Once every few months

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Half of consumers surveyed in India, Southeast Asia, and the United States say they drive their vehicle every day—roughly twice the number of consumers in Japan and South Korea who say the same, perhaps reflecting a difference in the quality and/or availability of mass transit across markets.

Willingness to give vehicle ownership for a MaaS solution (percentage of somewhat willing or willing or very willing)

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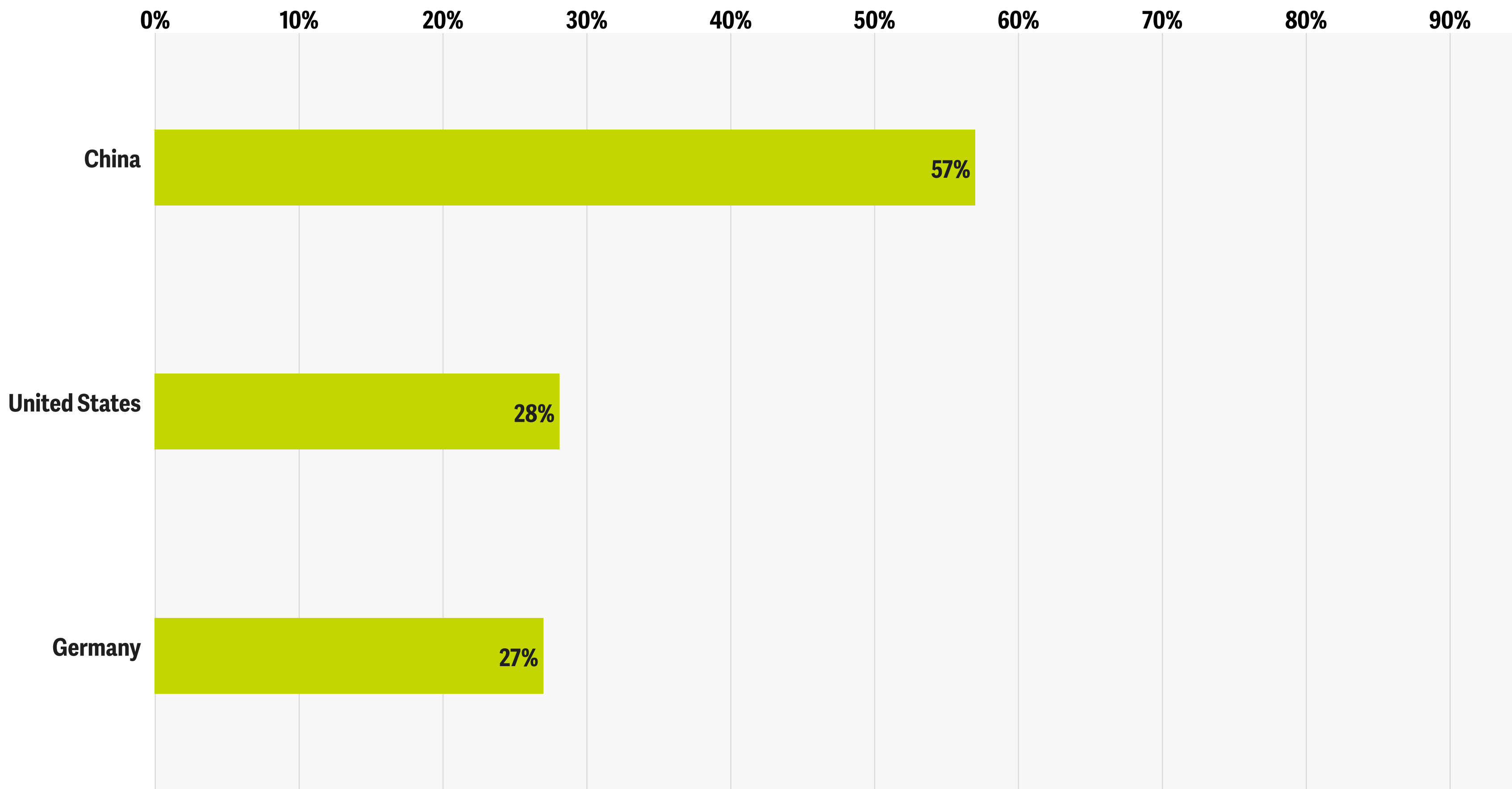

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Willingness: Somewhat willing, Willing, Very willing

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Even though consumers surveyed in India drive a lot, many younger consumers there would be willing to give up vehicle ownership in favor of a MaaS solution. In contrast, only 1 in 3 younger consumers in Germany would be willing to do the same.

MaaS versus private vehicle ownership for current mobility needs

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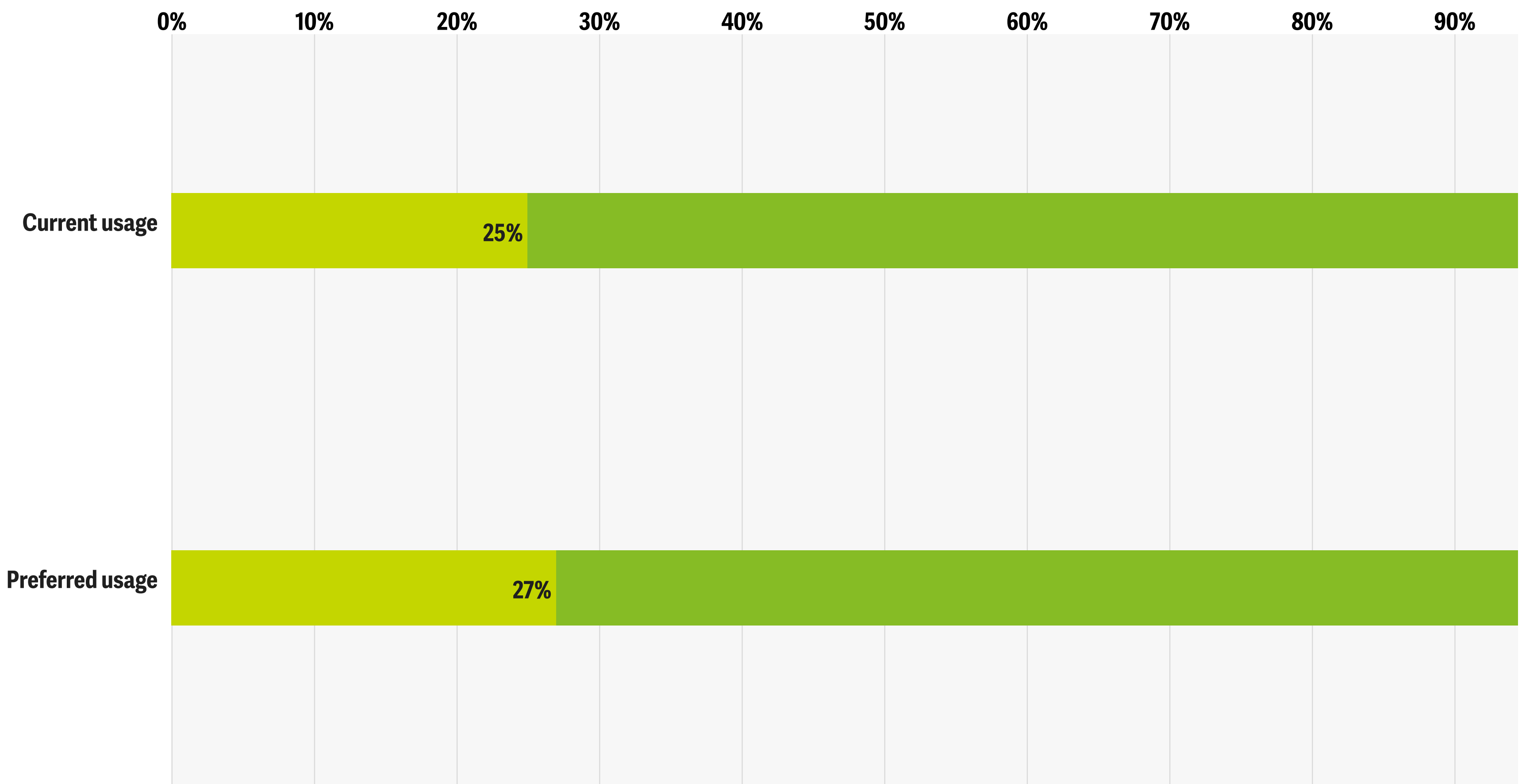

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Mobility-as-a-Service solution

Privately owned vehicle

Mobility/ownership type:

Countries: United States

Age: All

Gender: All

KEY TAKEAWAYS

Consumers surveyed across global markets currently use a combination of personal vehicles and MaaS solutions to satisfy their transportation requirements.

MaaS versus private vehicle ownership for future (in five years) mobility needs

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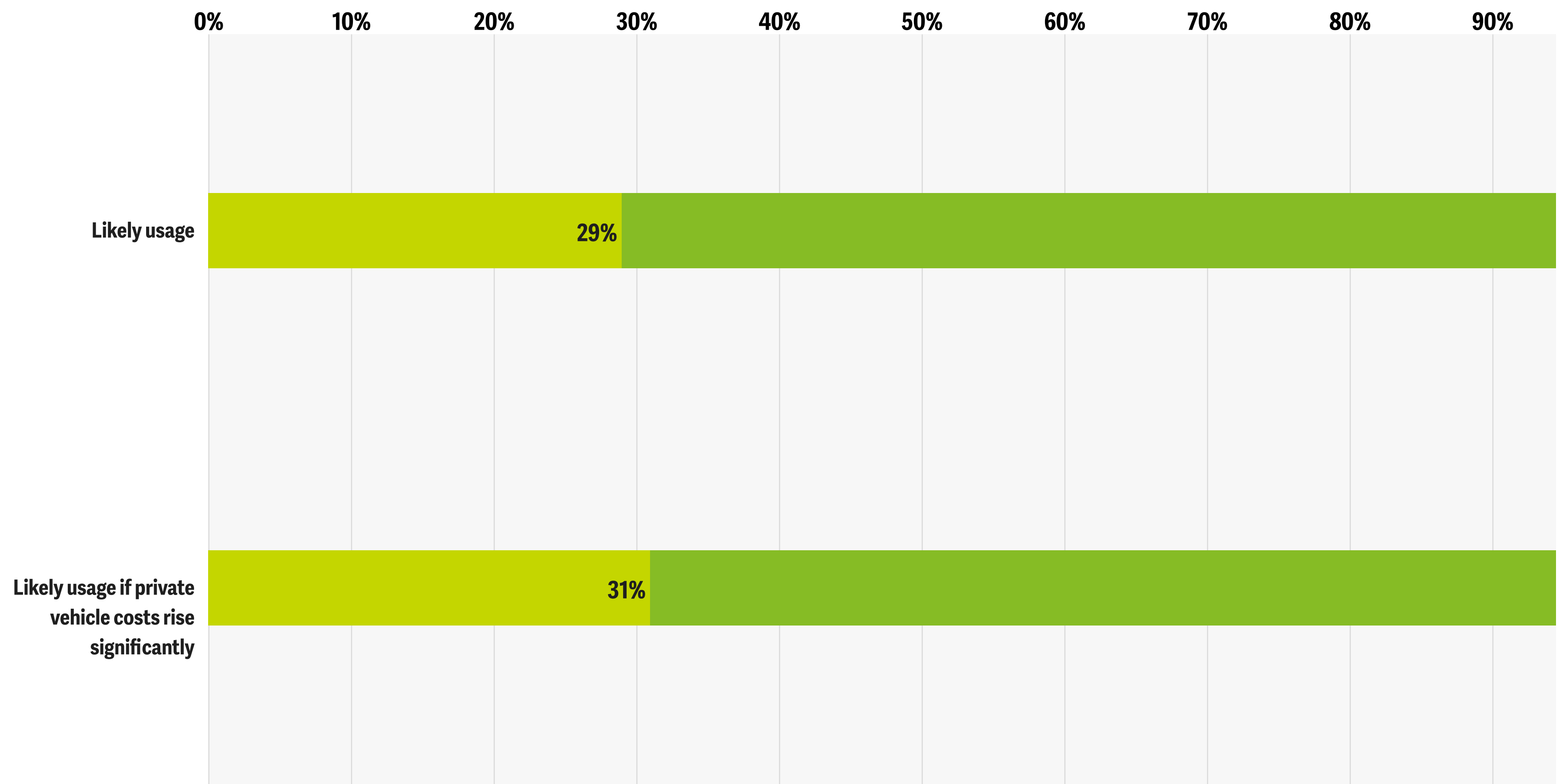

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Mobility-as-a-Service solution

Privately owned vehicle

Mobility/ownership type:

Countries: United States

Age: All

Gender: All

KEY TAKEAWAYS

Consumers surveyed across global markets expect their use of personal vehicles to decline somewhat in favor of MaaS solutions in five years.

Interested in giving up vehicle ownership for a vehicle subscription (percentage of somewhat or very interested)

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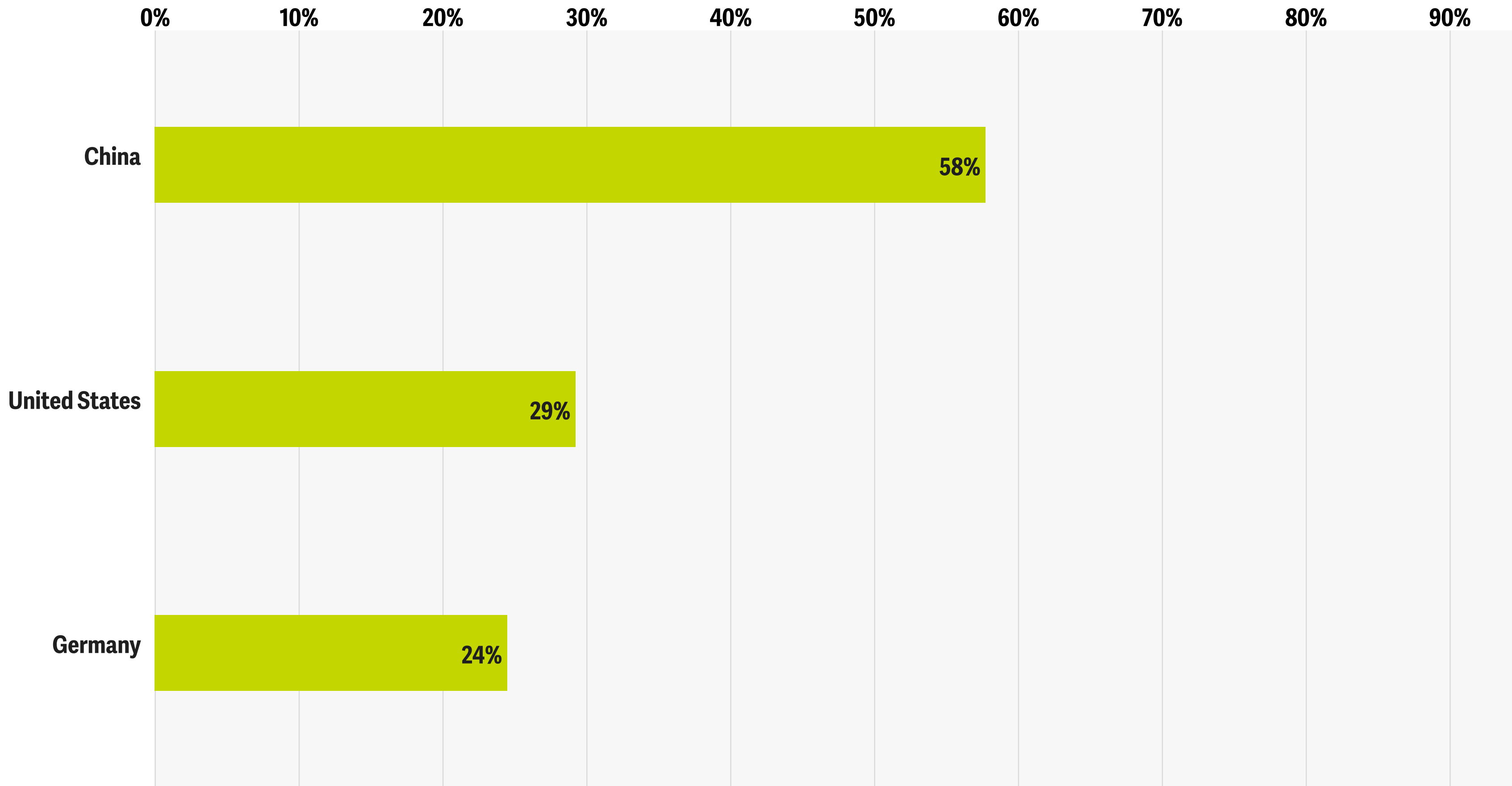

Level of interest in giving up vehicle ownership for a vehicle subscription: Somewhat interested & Very interested

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

A large number of younger consumers surveyed in some markets are at least somewhat interested in giving up vehicle ownership in favor of a subscription model, perhaps reflecting a backdrop of uncertain economic conditions causing concern for financial capacity.

Likelihood of keeping a private car longer (percentage of slightly likely or likely or very likely)

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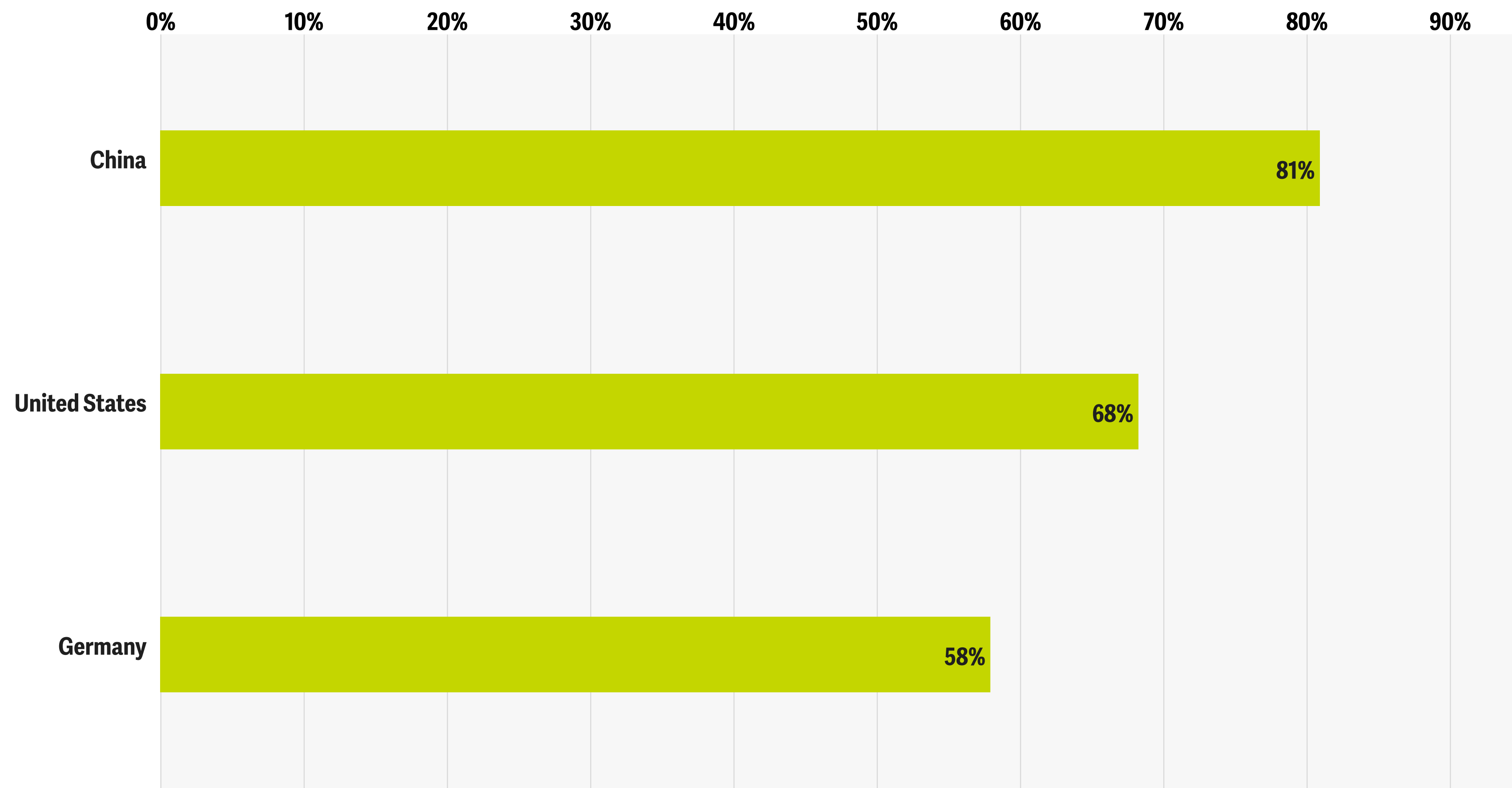

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Likelihood: Slightly likely, Likely, Very likely

Countries: China, Germany, United States

Age: All

Gender: All

KEY TAKEAWAYS

Many consumers prefer to keep their private vehicle for longer if technical updates can extend its lifespan and alternate transportation modes reduce their annual mileage.

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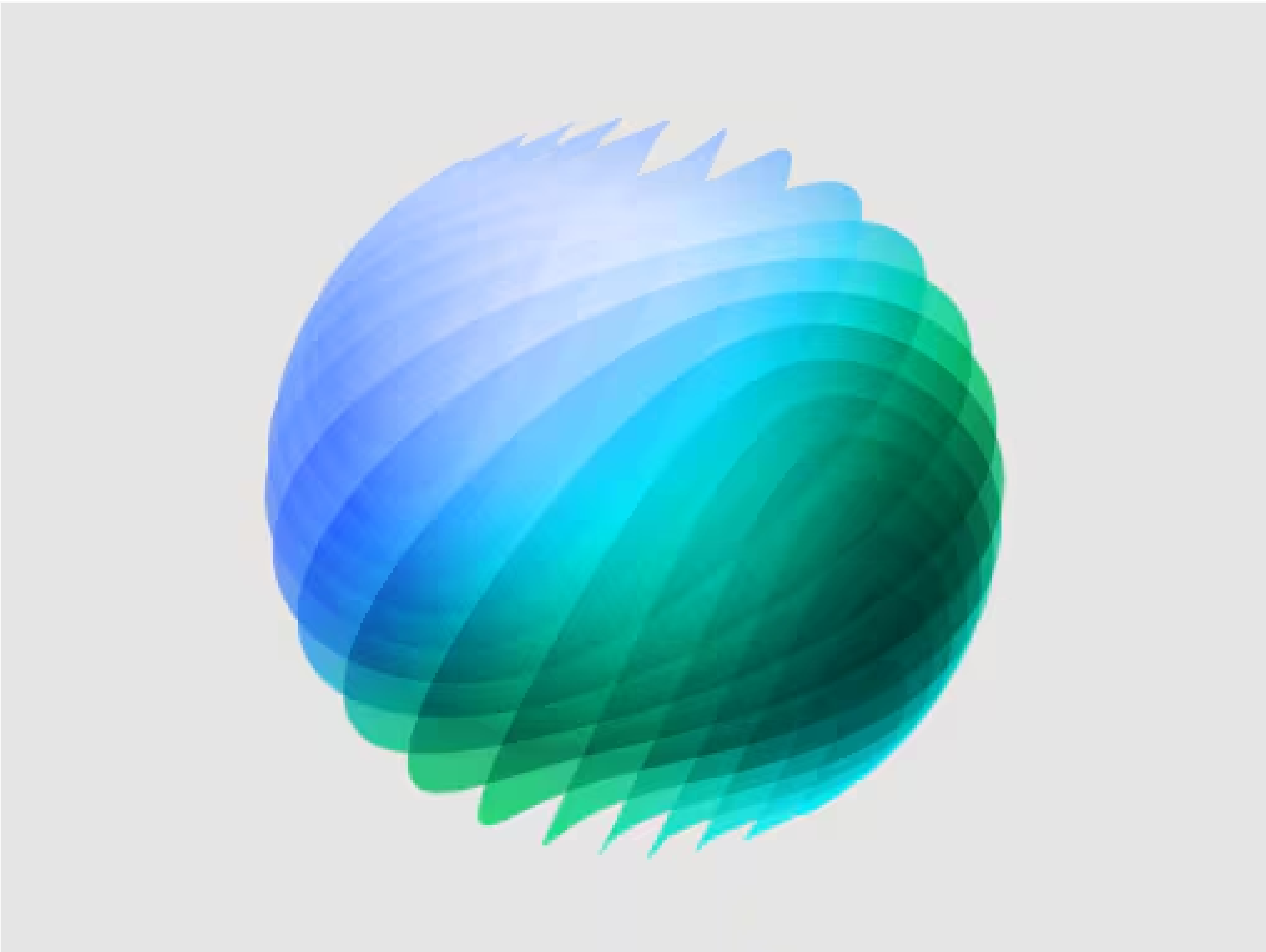

ConsumerSignals

ConsumerSignals provides a view into consumers' everyday finances and the spending strategies being used to navigate an unpredictable world.

INTERACTIVE

Climbing the electric vehicle transformation mountain

A convergence of concerns appears to hang over the automotive industry, which is already struggling to reinvent itself on a compressed timeline.

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Ryan Robinson
Automotive Research Leader