SIMON KUCHER
Unlocking better growth

Global Automotive Study 2025

Background and goals of this study

The automotive landscape in 2025 is defined by a striking duality: while consumer interest remains robust, rising financial discipline and intensified competition are reshaping industry dynamics.

In contrast to the 2024 report, which reflected post-pandemic optimism and recovery, this year's analysis marks a decisive pivot. Empowered, better-informed customers are increasingly dictating terms, forcing OEMs to adapt quickly and decisively.

In this environment, buyers are rethinking how they buy, what they value, and who they trust. Customers are more selective, informed, and segmented - requiring brands to balance price, perceived value, and credibility across increasingly diverse regional and generational landscapes. Success no longer comes from reach alone, but from relevance, clarity, and strategic focus.

This year's Global Automotive Study reflects the views of **6,780 car buyers across 20 markets** - revealing how customers think, choose, and where the industry must adapt.

Key questions addressed in the report include:

1. **How have confidence, expectations, and deal decision drivers evolved globally?**
2. **What defines value in a price-sensitive but experience-driven market?**
3. **How should EV strategies and brand narratives adapt to diverging customer segments?**
4. **Where does AI support the sales journey, and where is human interaction still key?**
5. **How should brands respond to China's rise, tariffs, and the used EV trust gaps?**

By leveraging the insights from this study, we hope that automotive businesses can optimize their strategies and stay ahead of the competition.

On the following slides, we hope to provide you with valuable insights and food for thought.
Enjoy reading!

Dr. Martin Gehring
Global Head of Automotive

Matthias Riemer
Partner

A note to our readers

This report covers a lot of ground. We cover **key trends, regional-specific results, and how businesses must react** to stay in the fast lane. However, there's still more to discover.

Get in touch to discuss results in a **one-to-one meeting** with a member of our team.

Let us help you drive your business forward.

Source: Simon-Kucher

Car buyer empowerment:

Tough market conditions combined with clear customer expectations require active sales

With extended ownership, customers evaluate their next car purchase more carefully

1

- **45% of consumers** report that their **purchasing power will decrease**, indicating decreasing customer confidence
- **Many buyers are postponing purchases** - 42% plan to keep their current vehicle longer
- However, **78%** of global buyers are **excited about new vehicles and brands** – especially in Asia (85%) and South America
- **Customers are in a stronger position**, facing a wide range of choices and aggressive pricing – if forced to choose another model, **21% would switch brands**; just **15% would stay with the brand** but choose another model

Insights refer to Chapter 01/03

Pricing is #1 purchasing driver - receiving a good deal is more important than ever

2

- **Price remains the #1 decision driver across all markets**, shortly followed by reliability or brand
- In **Western markets**, price importance is up to **15% higher** than in some Asian markets, where value-related criteria like innovation or brand play a stronger role
- Most customer see **various options when buying a new car**. However, if they don't get a good deal on one of their preferred options, they will **keep their current car longer. 60% do not consider an older used car** (> 3 years) as their next vehicle

Insights refer to Chapter 01

96% of EV drivers stay loyal to EVs – but markets expect coexisting technologies

3

- **96%** of current **EV drivers** will consider an EV again – **up from 92% in 2024**
- **66% globally** believe **EVs are the future**, though **growth has stabilized -** EV consideration mostly stable, settling at **Asia up to 85%**, Europe **46–79%**
- **One-size-fits-all EV strategies underperform** – Strong differences by age and premium vs. volume segments demand **targeted strategies**
- **Used EV demand is growing**, but **59% have concerns** over battery life, history, and poor resale which needs to be addressed via guarantees

Insights refer to Chapter 02

While Chinese brands gain traction, trust gaps remain - for now

4

- **43% would consider buying a Chinese car brand** (+4pp YoY), especially Gen Z and Millennials
- **Leading names: BYD, NIO, Xiaomi, Chery** – but brand familiarity drops sharply beyond these
- **Key concerns** of Chinese OEMs are **vehicle quality, service availability, and overall vehicle safety**
- **Chinese** OEMs **impress** with **adaptability, tech offerings,** and **aggressive pricing**

Insights refer to Chapter 03

Brand fatigue: From trail-blazer to controversy - about 40% of EV buyers would not buy a Tesla

5

- **58%** of respondents who are **considering an EV** would also **consider Tesla**
- **Tesla's appeal weakens in identity-sensitive markets** (Nordics, Germany) despite strong tech image - **China, UAE, and U.S. show higher Tesla acceptance**
- **Rejection reasons** are not strongly product-related, but centered on **leadership controversies** and **brand misalignment with personal values**
- In contrast, support for Tesla is highest in markets where **product performance and innovation** outweigh social/political concerns

Insights refer to Chapter 03

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780; EV: Electric vehicle; RV: Recreational vehicle

Car buyer empowerment:

Tough market conditions combined with clear customer expectations require active sales

Charging remains a hurdle for 74% of EV considerers, while trust also limits data sharing 6

- **At least 1 of 3 EV considerers report public charging issues**, mostly speed and availability
- **52% are aware of Vehicle-to-X tech**, yet 1 in 2 don't trust energy providers to access their battery
- **69% would share vehicle data**, but only **59% are comfortable sharing personal driving behavior**
- **Data-related trust gaps are largest in Western markets**, while Asian buyers show more openness to innovation

Insights refer to Chapter 04/05

AI drives early-stage decisions, but dealerships still seal the deal 7

- **54% of respondents rate AI positively** in the car buying journey, especially for tasks like trade-in valuation and financing
- **82% still prefer to complete the final transaction at a dealership**, showing trust remains anchored in personal interaction
- AI best supports decision-making in **early-stage online steps**, like model comparison or customizing configurations
- **OEMs should improve existing sales processes**, not disrupt them unnecessarily

Insights refer to Chapter 06

Predictability and transparency in service define the new loyalty standard 8

- **71% of customers see value in predictive maintenance** – reliability and issue prevention are top priorities
- **64% prefer bundled, pre-paid service plans**, highlighting the importance of cost transparency and long-term planning
- **Self-service parts platforms empower customers** – especially for **price comparisons and specification research**
- **Transparency and ease-of-use have become the new gold standard** – replacing status-driven service with practicality and trust

Insights refer to Chapter 07

73% see tariffs clearly driving prices – strategic pressure rises for OEMs 9

- **73% of respondents believe that tariffs increase car prices for all buyers** – not just imports
- Tariffs are seen as a **direct consumer burden**, influencing both **price perception** and **brand choice**
- Many consumers view **tariffs as a constraint on brand competition** and expect fewer brands to survive long term
- Countries with **strong domestic automotive industries** are generally **less critical of tariffs** than markets dependent on imports

Insights refer to Chapter 08

RV buyers want low cost, comfort and transparency – not just mobility 10

- **85 % of RV owners experienced unexpected maintenance costs**, especially related to HVAC and electrical systems
- **Cost, reliability, and interior comfort** rank as the **top 3 purchase drivers** for RV buyers
- RV resale value is **strongly influenced by condition and equipment**, not just brand or model
- **Trust and transparency gaps** persist in the RV market, especially around lifetime costs and service planning

Insights refer to Chapter 09

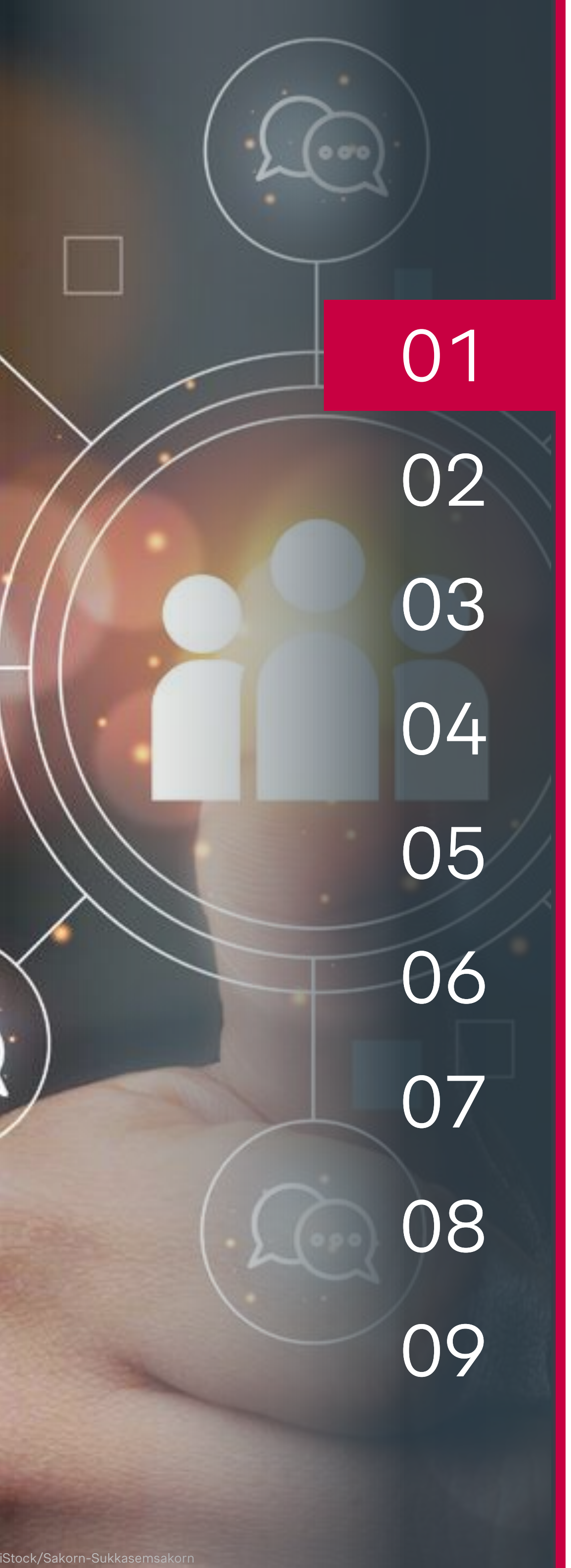
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780; EV: Electric vehicle; RV: Recreational vehicle

Winning Moves 2025

1	**Reframe value**	Make price-benefit transparency the lead message across segments	View ch. 1 & 7
2	**EV-confidence bundles**	Pair EV offer with charging credits, battery-health warranty, and residual-value guarantee	View ch. 2
3	**Offer modular EV options**	Bridge the charging gap and win hesitant first-time adopters with Range Extender (REX)	View ch. 2
4	**Second-life programs**	Capture value in the growing pre-owned EV and RV segments	View ch. 2
5	**Localize brand narratives**	Tailor positioning to address tariff, quality, and trust sensitivities by market	View ch. 2 & 8
6	**Strengthen residual value**	Especially for RVs and EVs, drive purchase confidence with resale predictability	View ch. 2 & 9
7	**Invest in V2X education**	Build public understanding of grid integration benefits and use cases	View ch. 4 & 5
8	**Data trust**	Provide transparency and control in connected-car data usage	View ch. 5
9	**AI + Human "Sales Symphony"**	Let AI start the journey, but empower dealers to close with credibility	View ch. 6
10	**Lifetime service subscriptions**	Move from repair to "never-fail" with predictive maintenance & prepaid care packs	View ch. 6 & 7

Which move will define *your* next model cycle?

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers)



iStock/Sakorn-Sukkasemsakorn

Agenda

Key Questions

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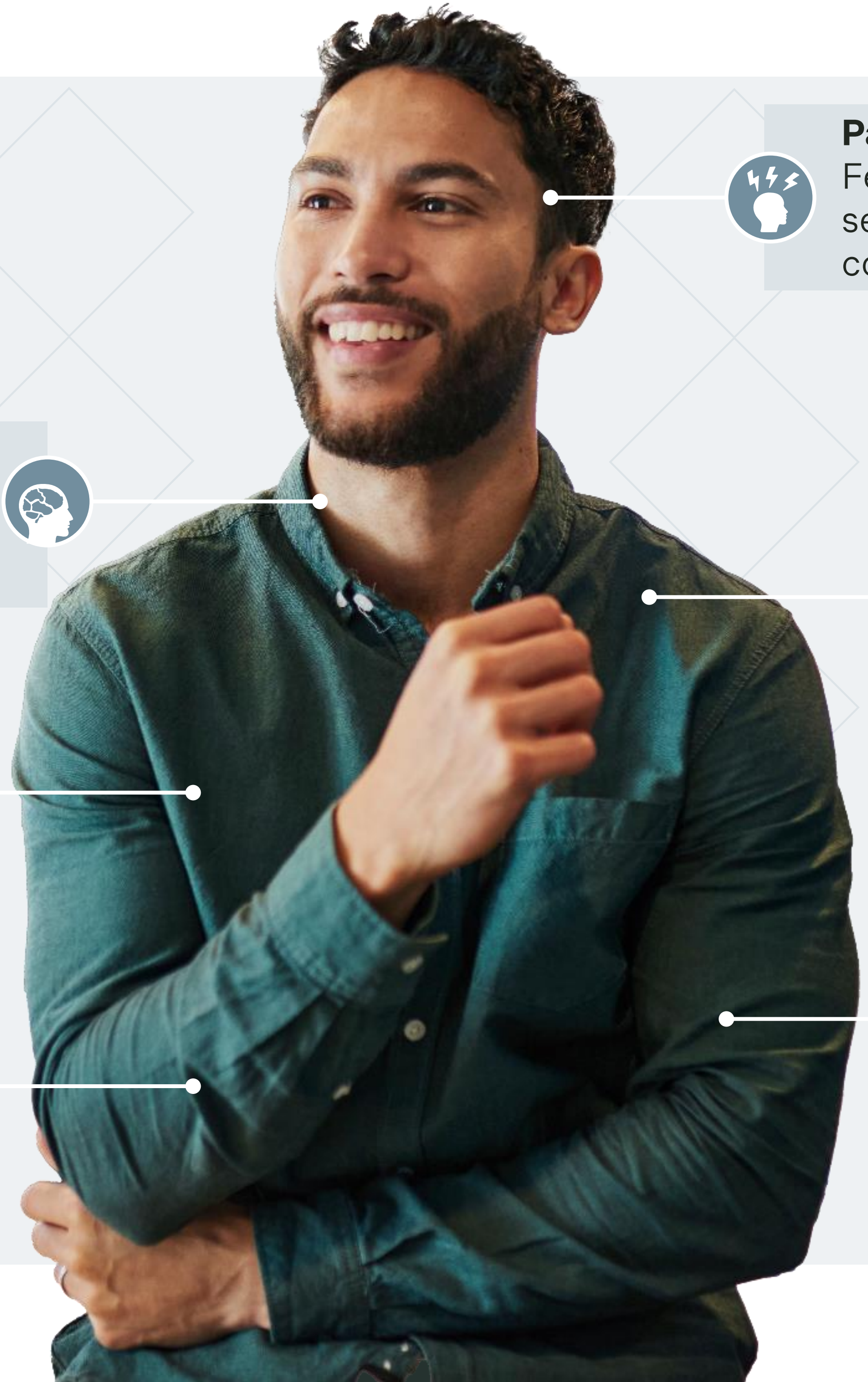
Value-Seeker 2025 | The Tech-Curious, Price-Anchored Auto Consumer



Pain points
Fears EV charging gaps, hidden service costs, and data privacy concerns

Holding period
Extends vehicle holding period in response to economic pressure and uncertainty

Channel behavior
Starts digitally with configurators/AI, but needs "human stamp" at the dealership

Purchase triggers
Demands transparent pricing and demonstrable total cost advantages

Risk perceptions
Questions brands impacted by tariffs or perceived product quality gaps

Loyalty drivers
Rewards brands offering bundled services and honest data practices

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers)

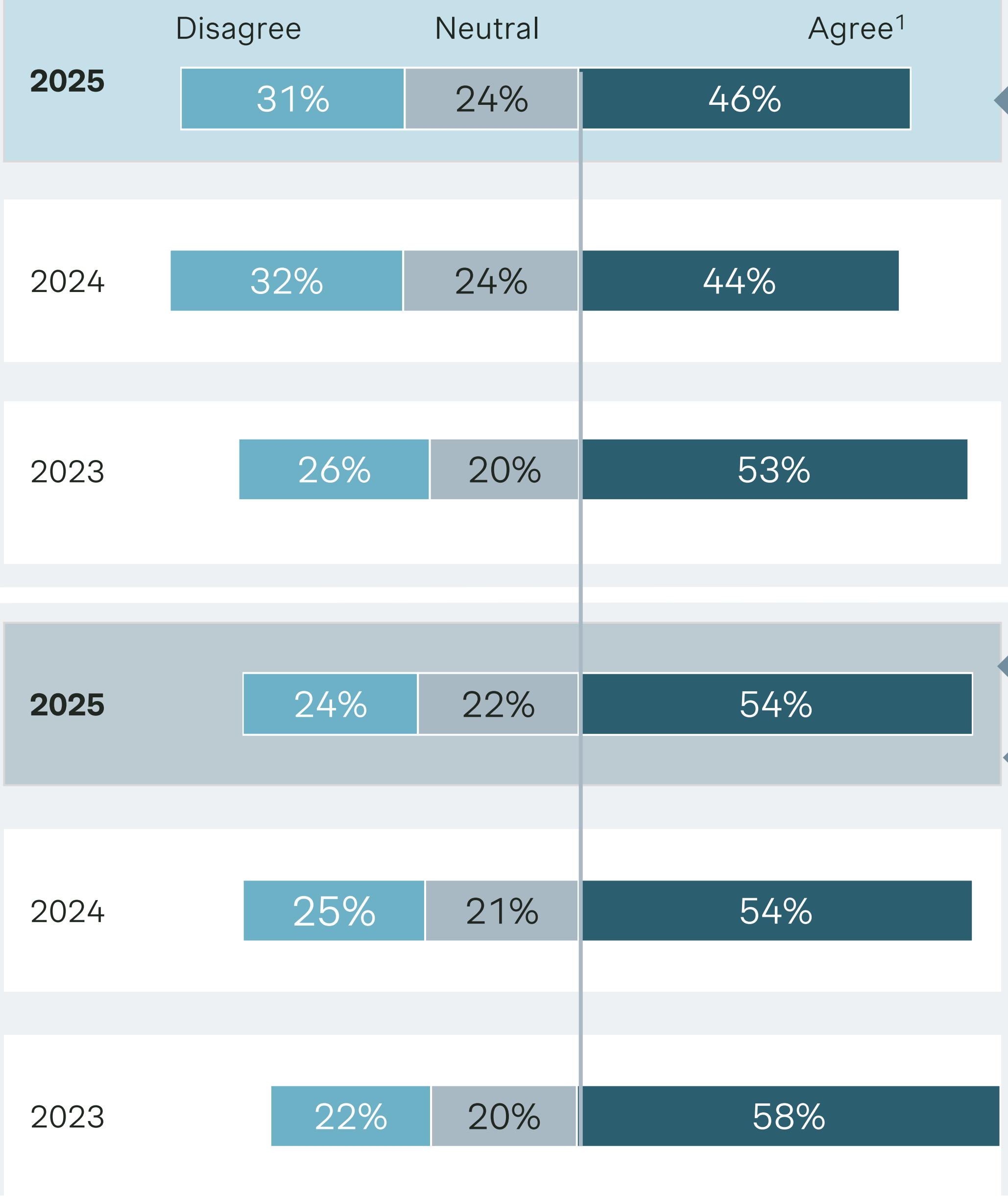
Despite expecting weaker purchasing power, consumer confidence stays high as customer grow more conscious of their decision power

iStock/Tassii

"My purchasing power will decrease"

Influenced by macro trends like Inflation

"I will keep my current vehicle longer"



Year-on-year, **+2 pp more consumers expect weaker purchasing power**, yet confidence stays high as consumers grow more conscious of their decision power

Expectation to **keep** a current **vehicle longer is stable**

Highest agreement in **Canada**, **US** and **Australia**

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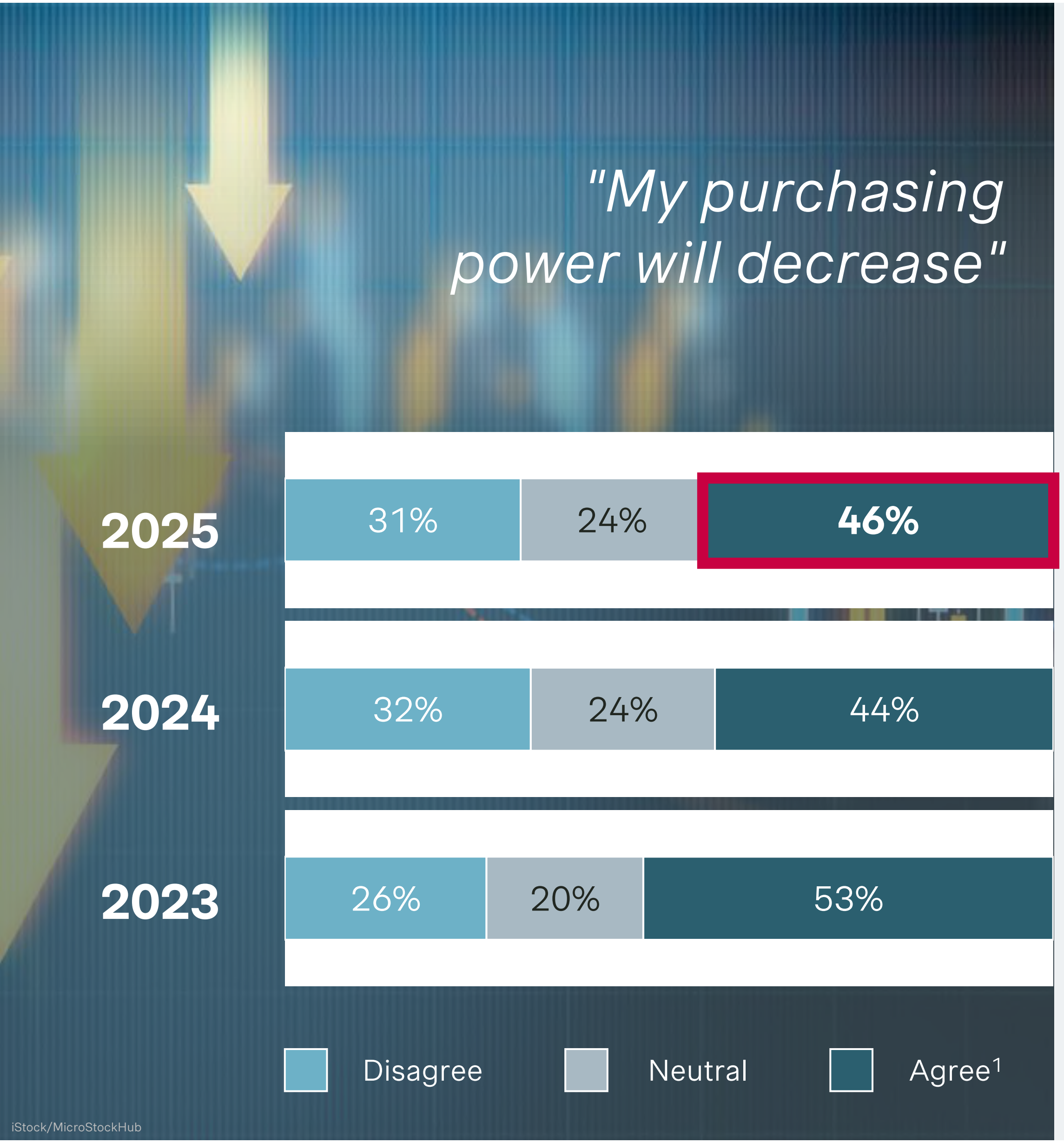
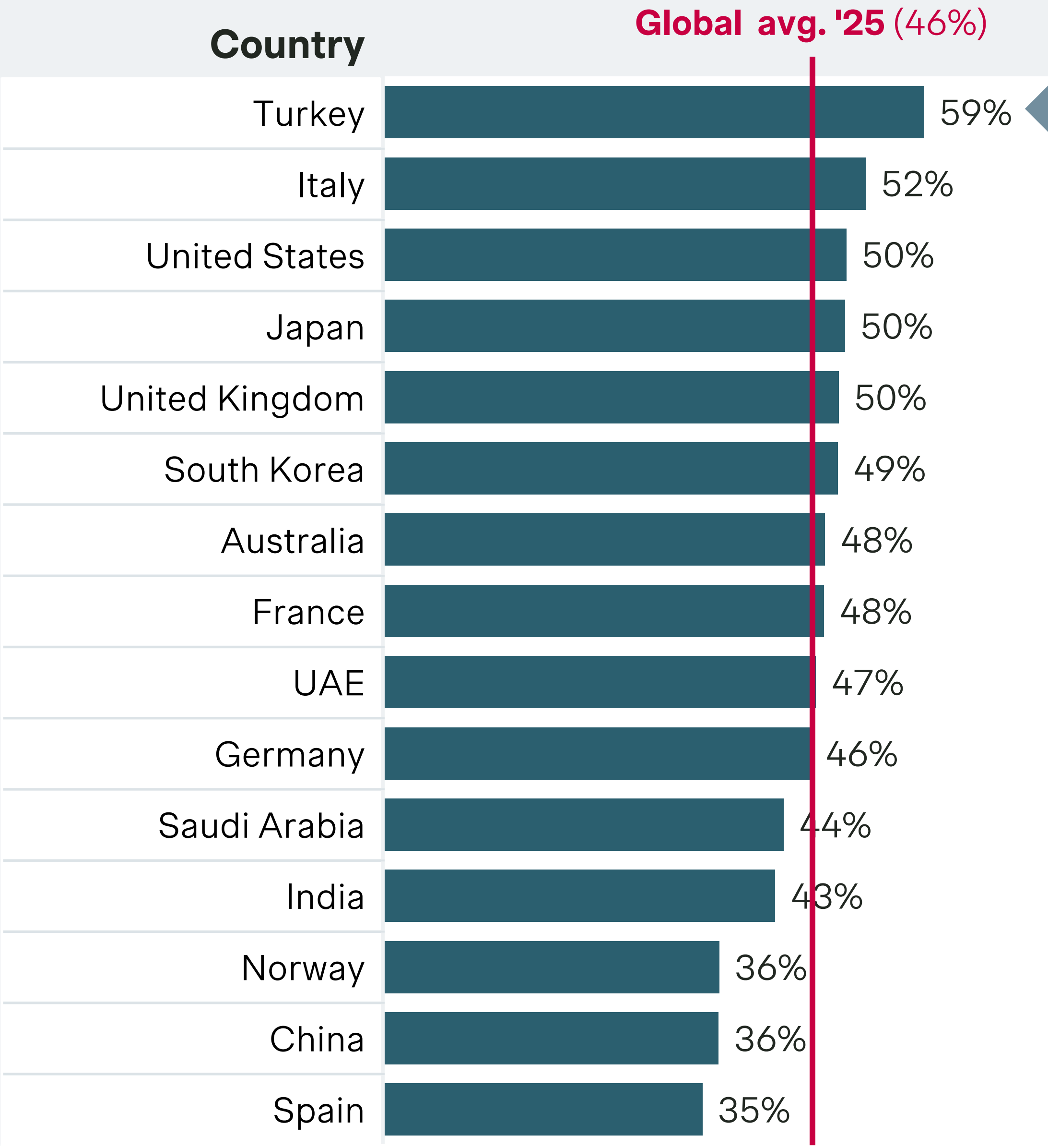
1) Agreement defined as 5, 6 or 7 on a 7-point scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 5,747 (overall sample size per question might vary, e.g., due to preselected answers); Q: The overall economic situation often impacts consumer sentiment and the automotive industry. With this in mind, how do you evaluate the following statements regarding your next vehicle purchase?

The expectation that purchasing power will decrease varies significantly between countries, ranging from 59% in Turkey to 35% in Spain

"My purchasing power will decrease"





Turkey has the highest fear of decreasing purchasing power

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1) Agreement defined as 5, 6 or 7 on a 7-point scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 5,747 (overall sample size per question might vary, e.g., due to preselected answers); Q: The overall economic situation often impacts consumer sentiment and the automotive industry. With this in mind, how do you evaluate the following statements regarding your next vehicle purchase?

Most consumers consider various options before buying; if they don't find a good deal on one of their preferred options, they will keep their current car longer

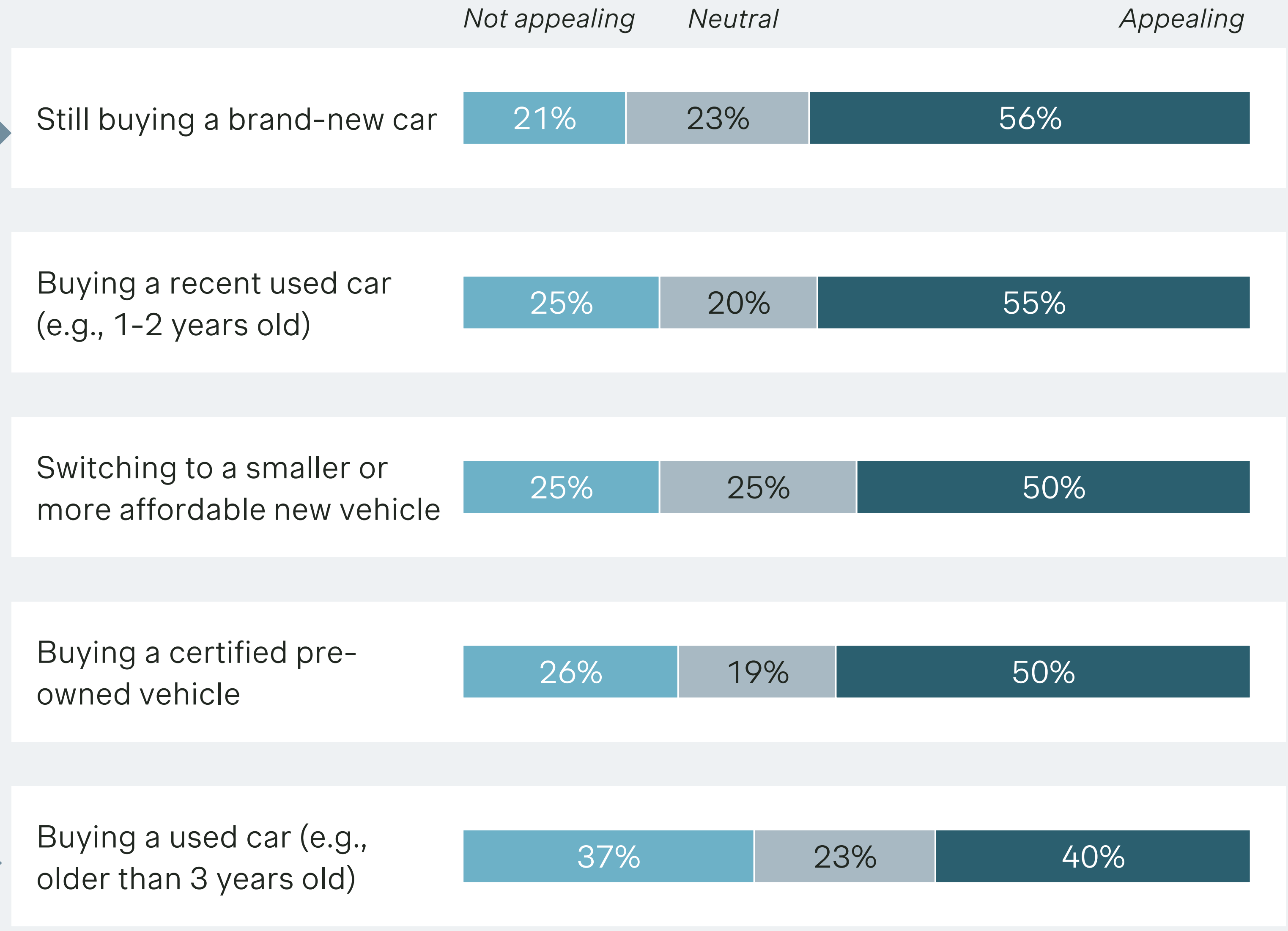
Prices for new cars rise significantly and/or discounts go down

Significant customer movement expected, e.g., depending on the best offer

What will consumers do apart from extending their ownership period?

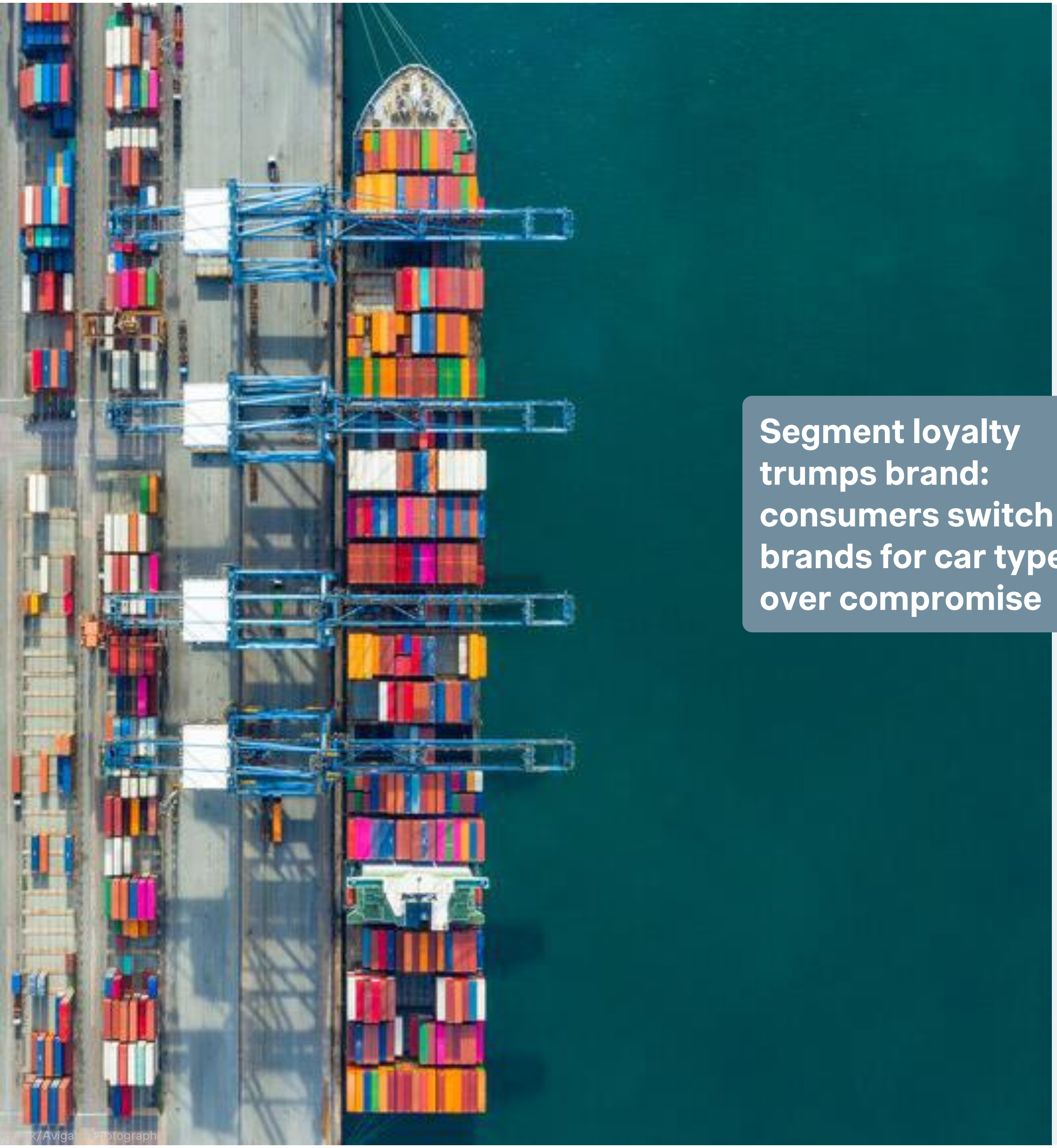
60% of consumers would **not consider buying an older used car** as their next car

iStock/Drazen-Zigic



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Imagine that prices for new cars rise significantly, or discounts become much less attractive. How would that affect your interest in the following alternatives?

In case of long delivery times, majority of customers would prefer staying with the same brand and model before taking any other action



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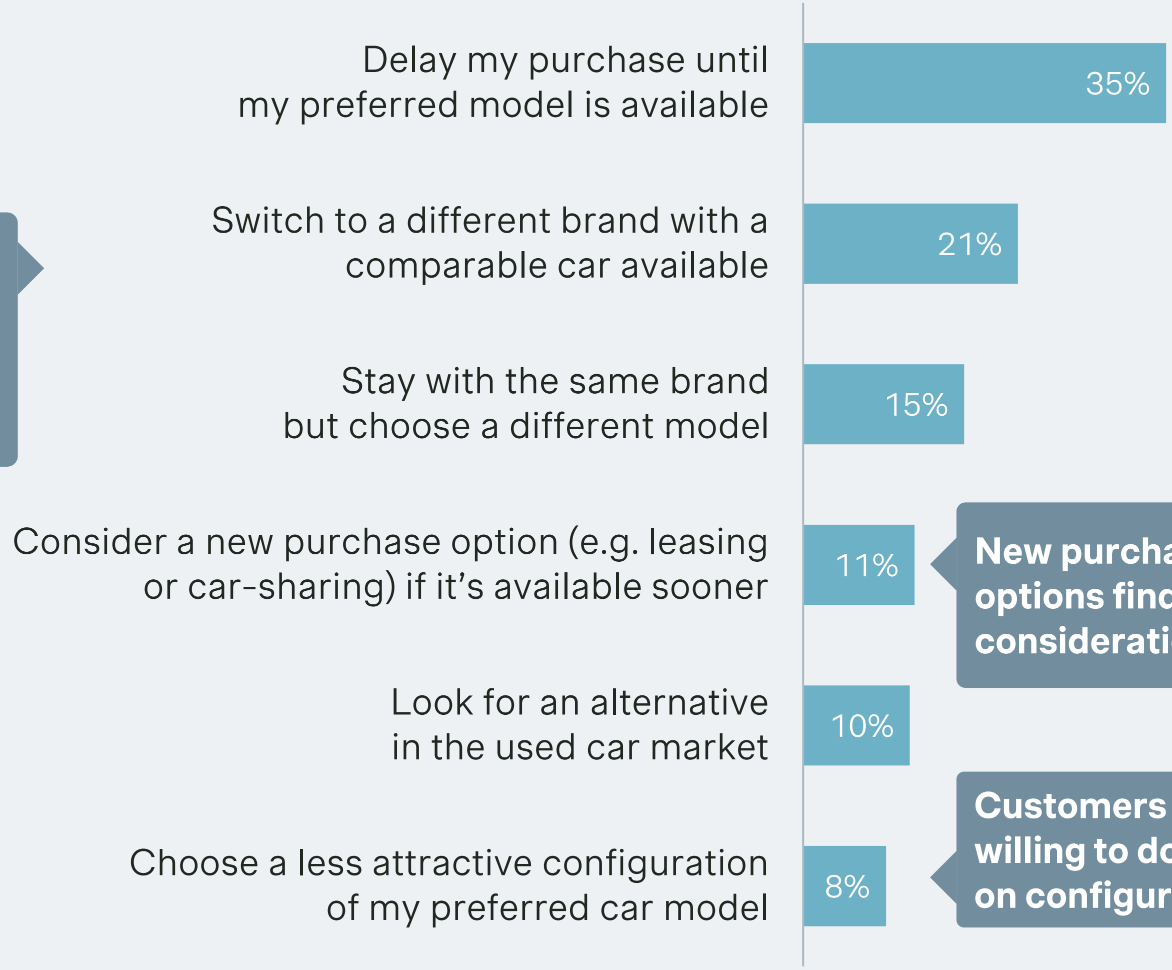
Segment loyalty trumps brand: consumers switch brands for car type over compromise

Customer response to limited or significantly delayed preferred vehicle availability



Consumers are willing to wait for the configured product before taking other actions

New purchase options find very little consideration

Customers are not willing to downgrade on configurations

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Imagine that your preferred car is currently unavailable or has a very long delivery time. How would you most likely respond in this situation?

Raising excitement in Europe (+5 pp), North America (+11 pp) and Oceania (+5 pp) compared to last year

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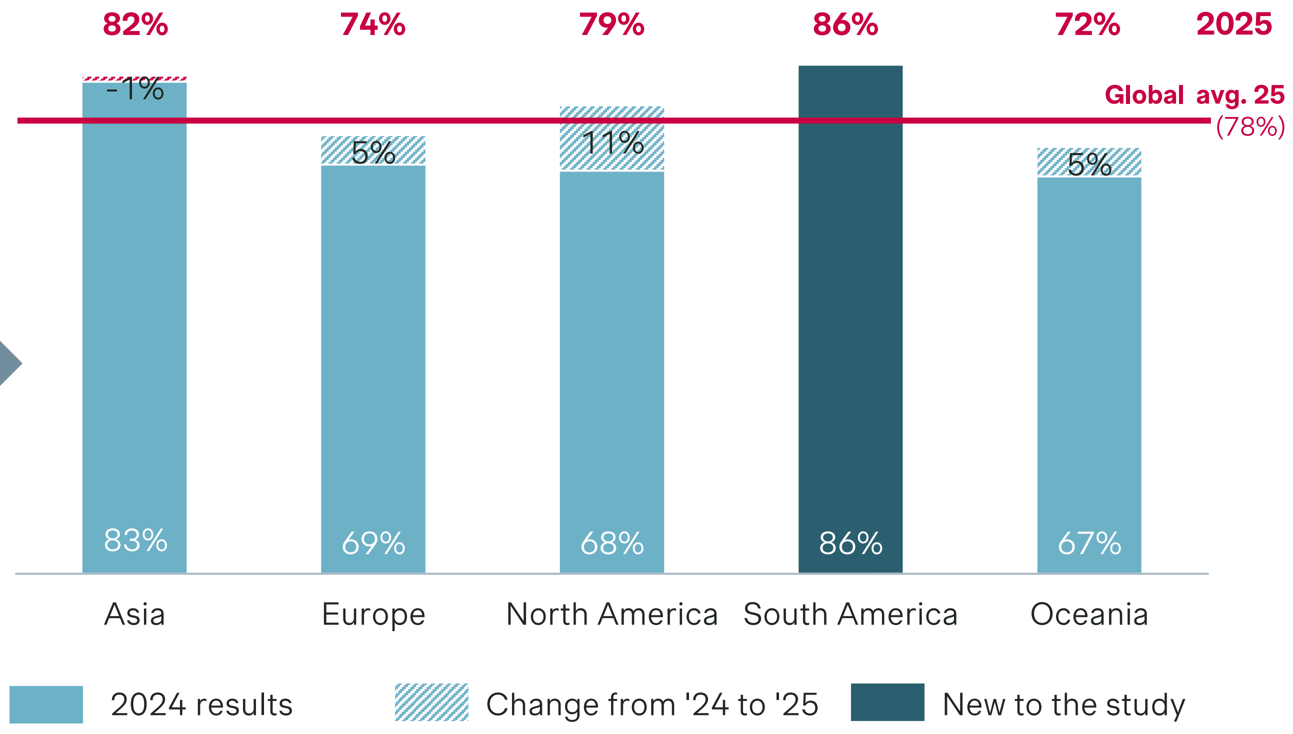
Enthusiasm for future development and innovation in vehicles and brands is high…

….especially among Asian & South American customers

Share of respondents who are excited[1] across markets



[1] Excitement defined as 5, 6 or 7 on a 7-point scale;
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Talking about brands, how much do you agree with the following statements? - I am excited to see what the future has to offer in terms of new cars and brands.

A personal car remains very relevant for 2/3 of respondents, who see it as a way of self-treatment and reward

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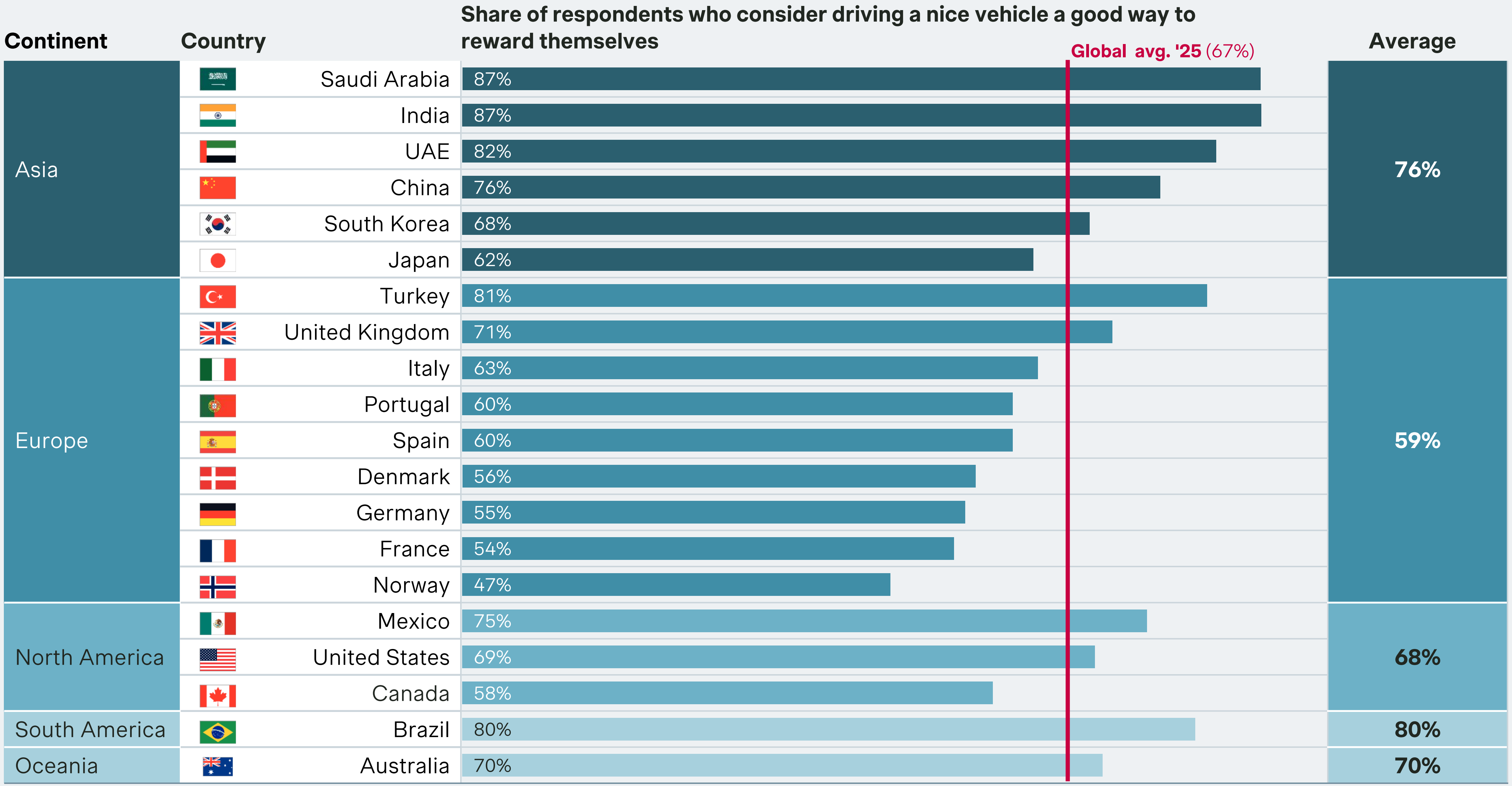
Evaluation of statements[1] regarding purchasing and owning vehicles by country



Continent	Country	Share of respondents who consider driving a nice vehicle a good way to reward themselves	Average
Asia	Saudi Arabia	87%	76%
	India	87%	
	UAE	82%	
	China	76%	
	South Korea	68%	
	Japan	62%	
Europe	Turkey	81%	59%
	United Kingdom	71%	
	Italy	63%	
	Portugal	60%	
	Spain	60%	
	Denmark	56%	
	Germany	55%	
	France	54%	
	Norway	47%	
North America	Mexico	75%	68%
	United States	69%	
	Canada	58%	
South America	Brazil	80%	80%
Oceania	Australia	70%	70%

Asian consumers still consider a car as a status symbol

Within Europe, Turkey is the country that holds highest value in car ownership

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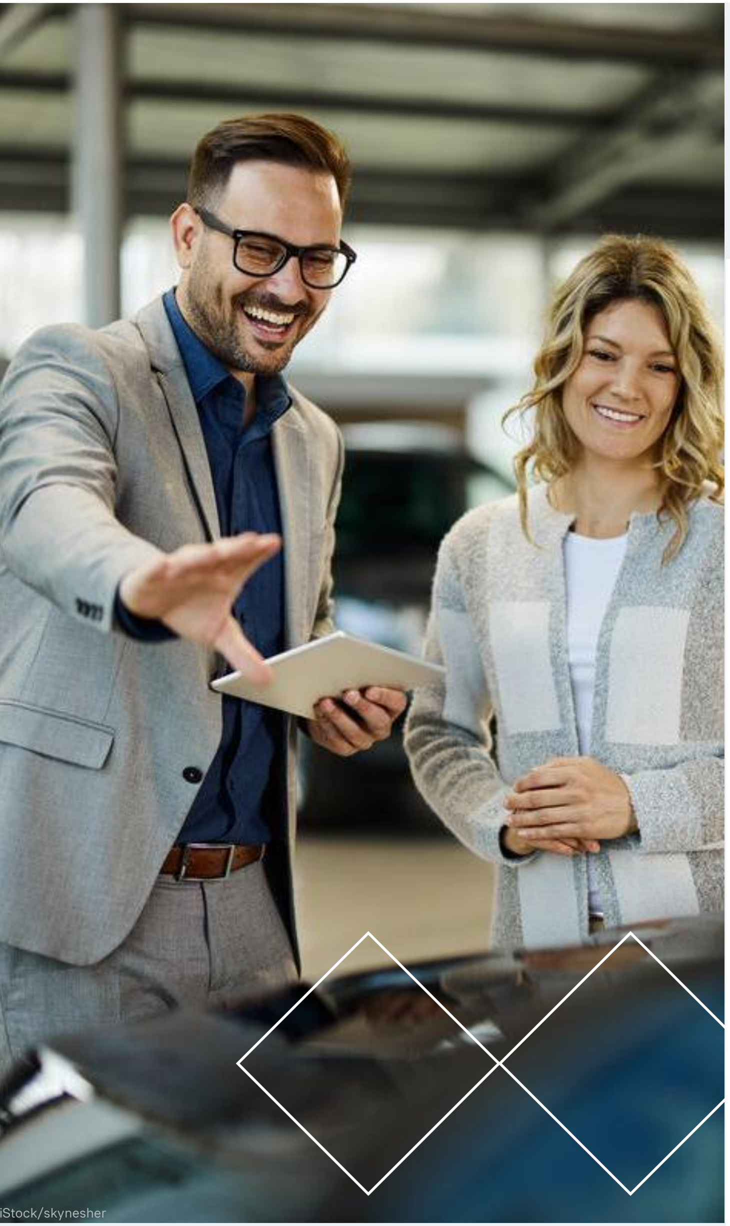
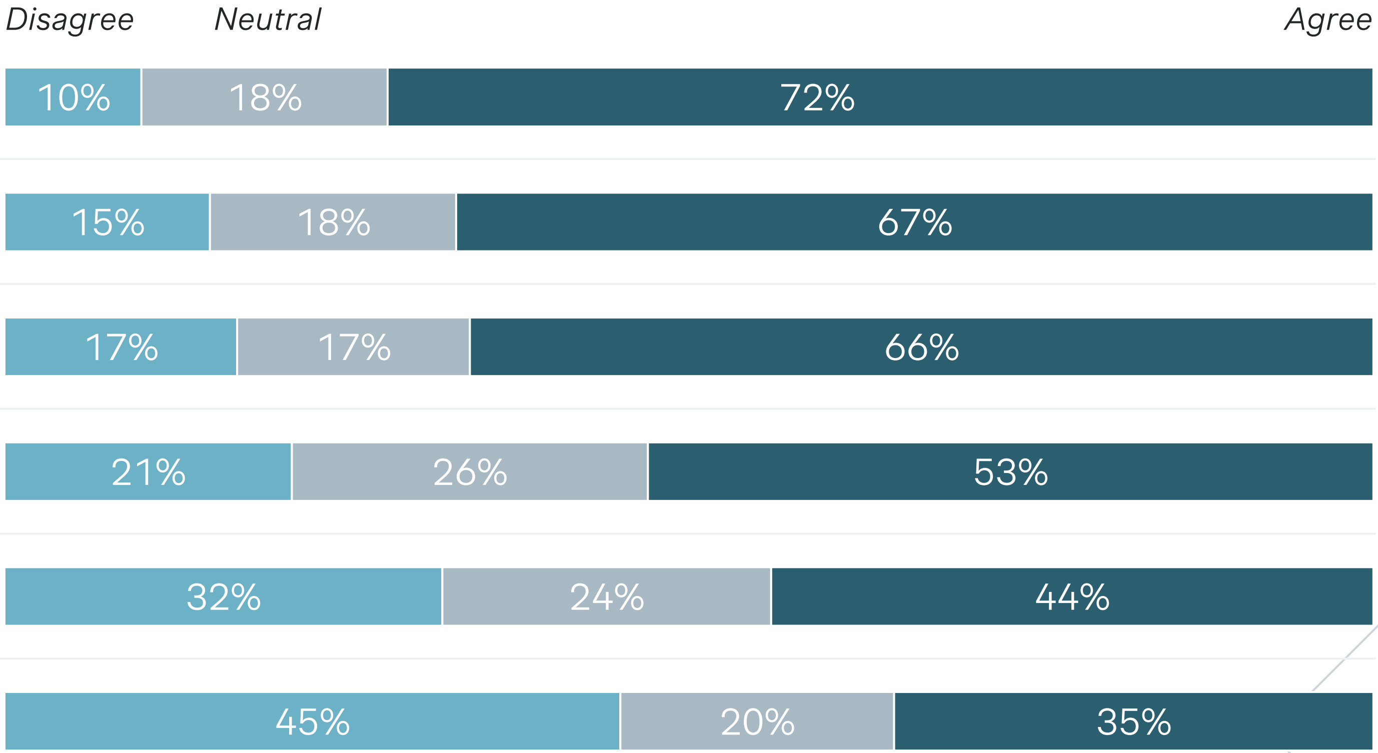
1) Agreement defined as 5, 6 or 7 on a 7-point scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: At the same time consumer behavior for purchasing and owning vehicles often changes over time. When thinking of your own behavior and expectations, to what degree would you agree with the following statements? - Driving a nice vehicle is a good way to reward myself; - My inclination to own a car has reduced

For two-thirds of the global automotive buyers, EVs are the future



Consumer behavior and expectations

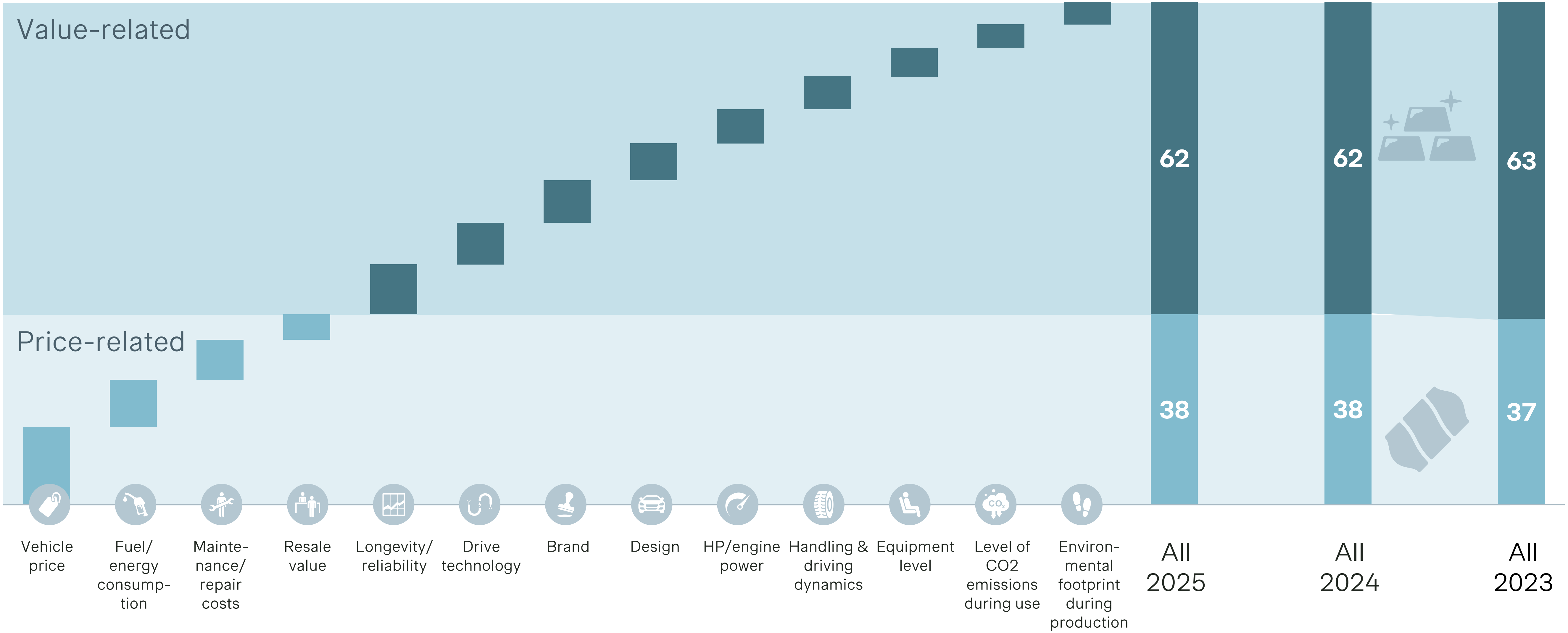


	Disagree	*Neutral*	*Agree*
Safety is more important than design and brand	10%	18%	72%
Driving a nice vehicle is a personal reward	15%	18%	67%
EVs are the future	17%	17%	66%
Non-premium car quality closes in on premium	21%	26%	53%
Shared mobility is more cost-effective	32%	24%	44%
Car ownership loses appeal	45%	20%	35%

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When thinking of your own behavior and expectations, to what degree would you agree with the following statements? Please rate from "1 = Strongly disagree" to "7 = Strongly agree".

Value-related considerations remain just as influential in purchase decisions as they were a year ago

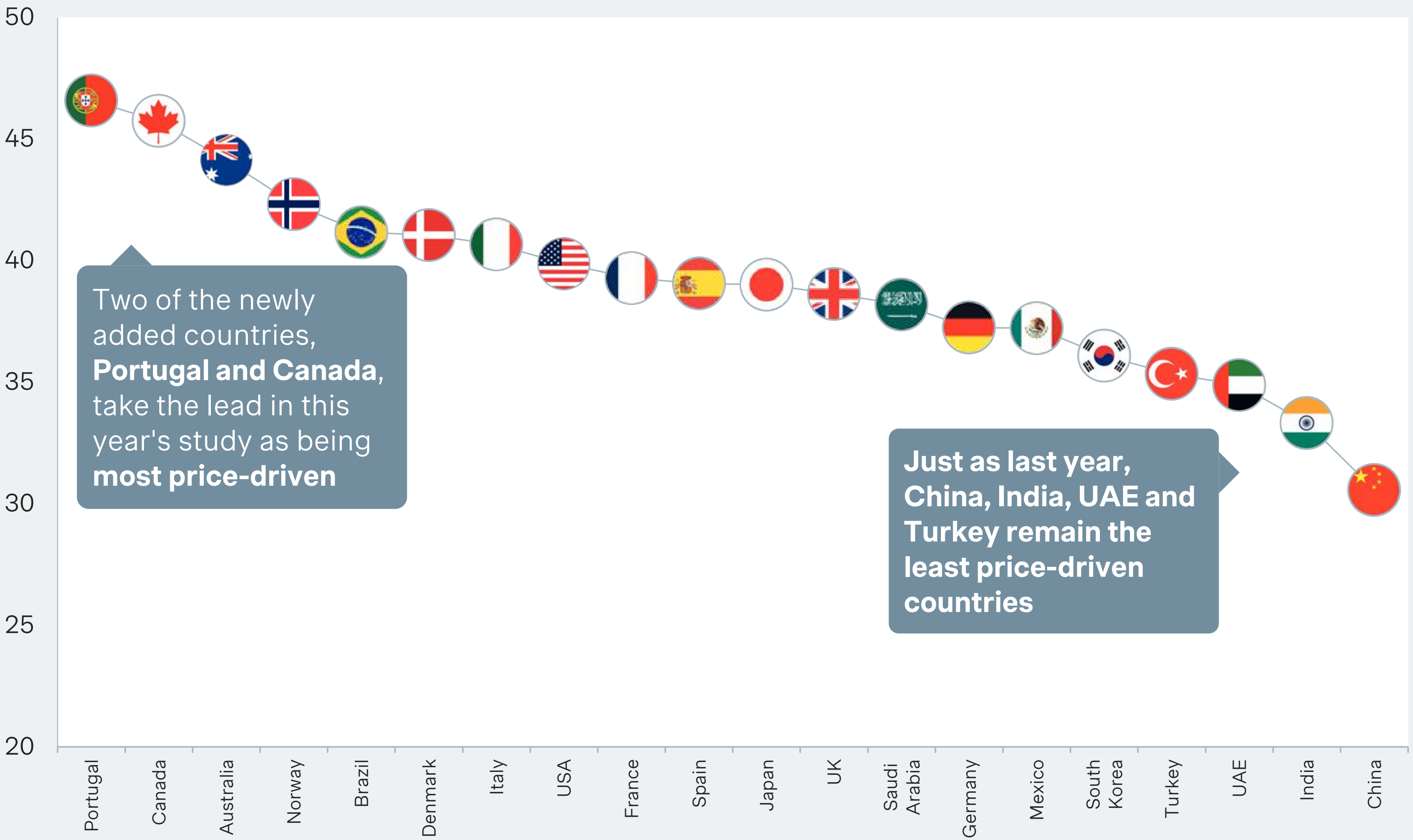
Importance of purchase drivers



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about getting a car, how important is each of the following purchase drivers? Please distribute 100 points across the items. A higher number reflects a higher importance.

Western consumers still value price more than those in most Asian countries

Importance of price-related criteria[1] among all purchase drivers



Two of the newly added countries, **Portugal and Canada**, take the lead in this year's study as being **most price-driven**

Just as last year, China, India, UAE and Turkey remain the least price-driven countries

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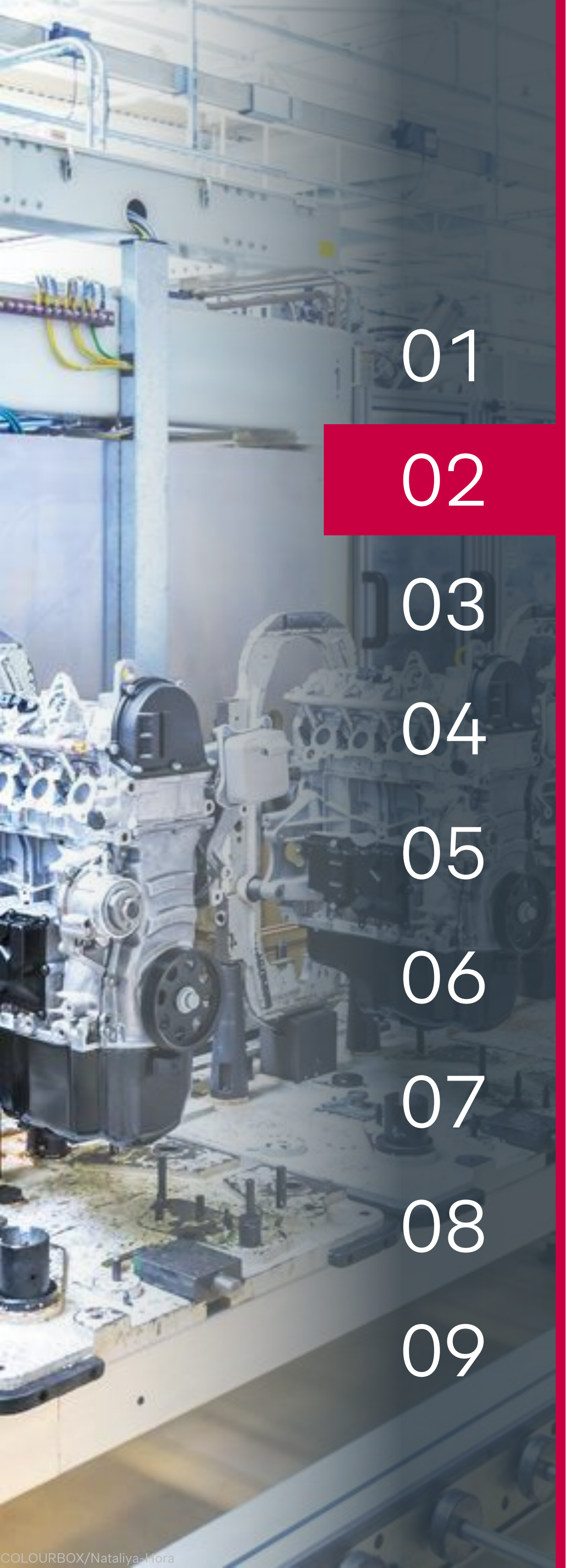
1) Aggregation of vehicle price, maintenance costs, resale value and fuel consumption; Note: The Option to distribute points to "Running costs" was added in the 2025 Study.

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about getting a car, how important is each of the following purchase drivers?


COLOURBOX/Nataliya-Hora

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66% of respondents believe that EVs are the future, especially younger generations are driving the shift towards electric mobility

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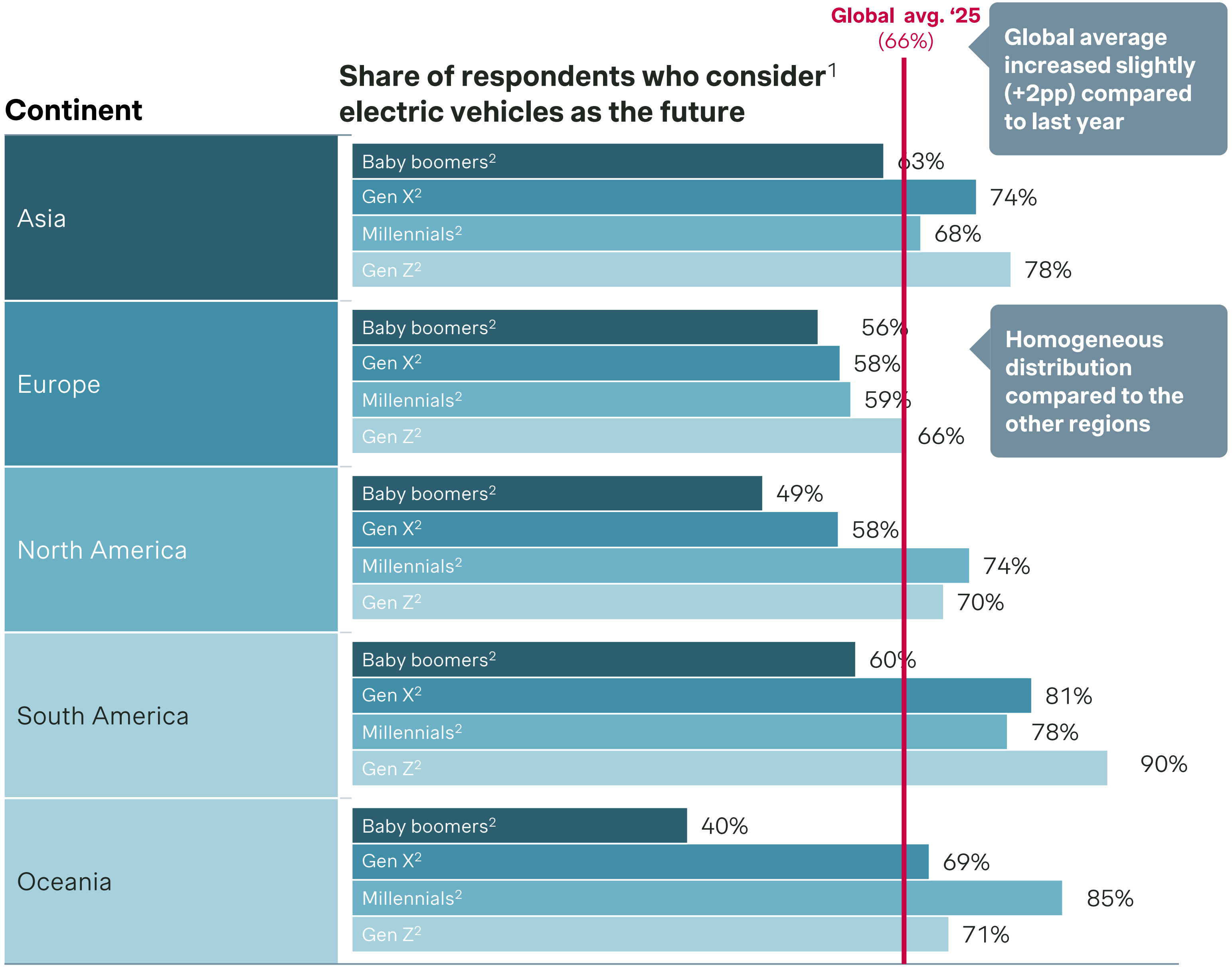


Share of respondents who consider[1] electric vehicles as the future

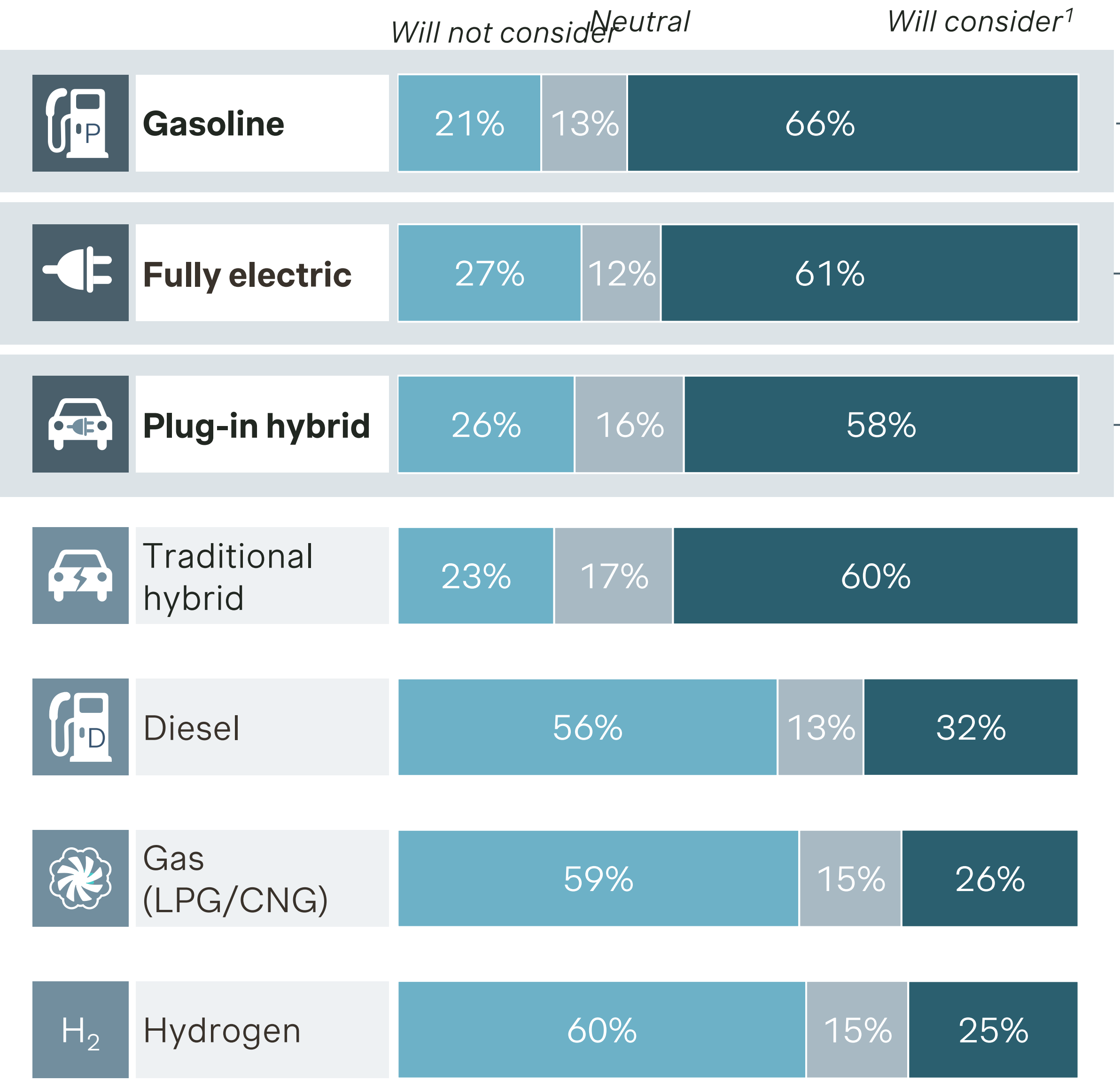
Global average increased slightly (+2pp) compared to last year

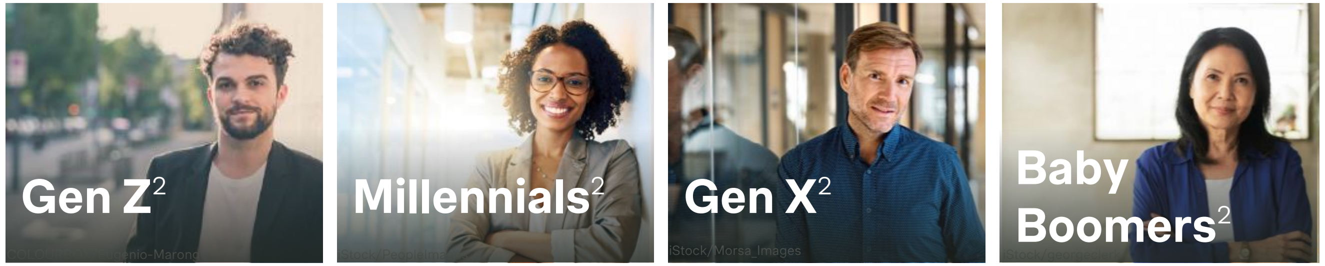
Homogeneous distribution compared to the other regions

1) Consideration defined as 5, 6 or 7 on a 7-point scale; 2) Gen Z = 18-28 years, Millennials = 29-44 years, Gen X = 45-60 years, Baby Boomers = 61+ years; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When thinking of your own behavior and expectations, to what degree would you agree with the following statements? - Electric vehicles are the future

Consideration for electric vehicles is stable with exceptions for young and older generations

Engine type consideration





Avg. consideration 66%

2025	**70%** ▲	**66%** ▼	**64%** ▲	**63%** ▲
2024	69%	68%	58%	60%

Avg. consideration 61%

2025	**61%** ▼	**68%** ▼	**58%** ▼	**48%** ▲
2024	69%	71%	58%	42%

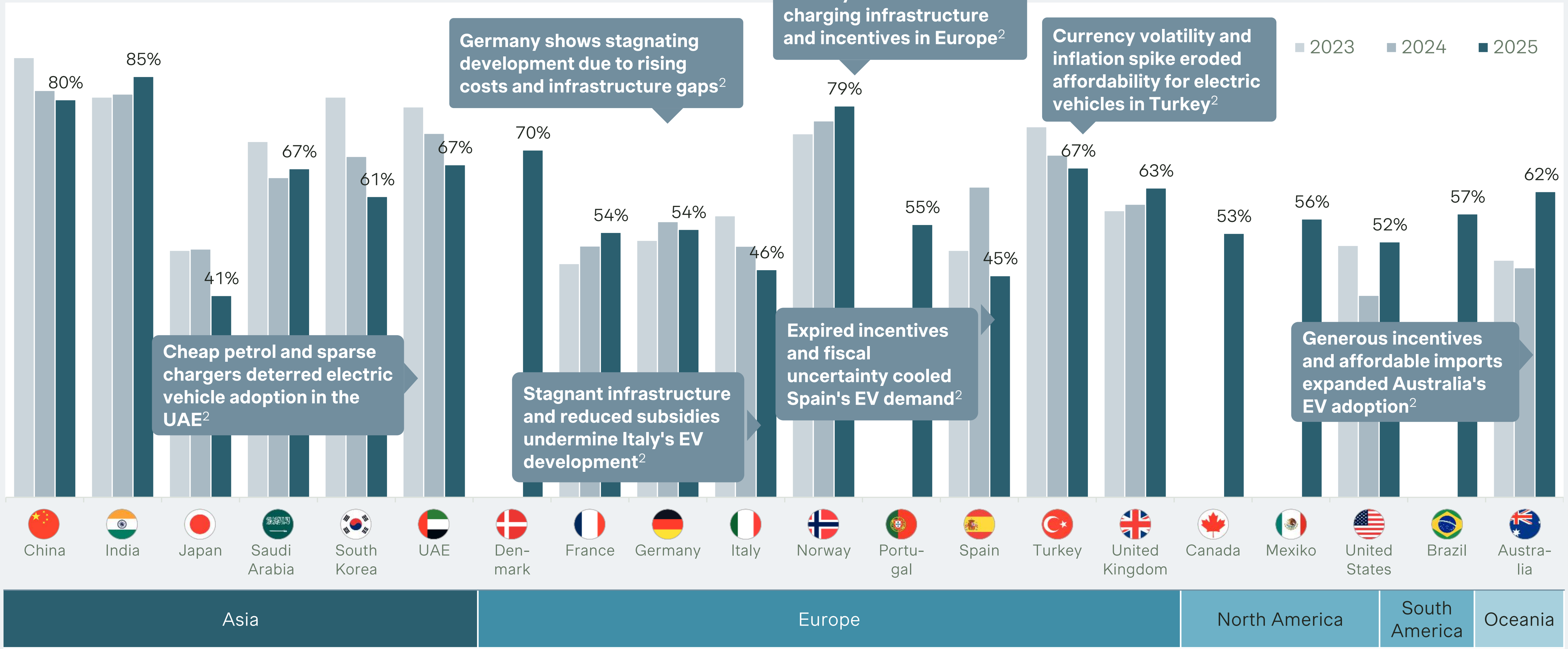
Avg. consideration 58%

2025	**59%** ▼	**63%** ▼	**59%** ▲	**51%** ▲
2024	61%	68%	58%	44%

1) Consideration defined as 5, 6, or 7 on a 1-7 scale, non-consideration defined as 1, 2, or 3 on a 1-7 scale; 2) Gen Z = 18-28 years, Millennials = 29-44 years, Gen X = 45-60 years, Baby Boomers = 61+ years;
Source: Simon-Kucher Global Automotive Study, June 2025; n = n = 5,747 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about purchasing or leasing a new vehicle, which engine type will you consider?

EV consideration remains strong across many regions, with an initial decline visible in some key markets (e.g., China, South Korea, Japan, Germany)

EV consideration[1] by country



Cheap petrol and sparse chargers deterred electric vehicle adoption in the UAE[2]

Germany shows stagnating development due to rising costs and infrastructure gaps[2]

Stagnant infrastructure and reduced subsidies undermine Italy's EV development[2]

Norway has the best charging infrastructure and incentives in Europe[2]

Expired incentives and fiscal uncertainty cooled Spain's EV demand[2]

Currency volatility and inflation spike eroded affordability for electric vehicles in Turkey[2]

Generous incentives and affordable imports expanded Australia's EV adoption[2]

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1) Consideration defined as 5, 6, or 7 on a 1-7 scale;
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about purchasing or leasing a new vehicle, which engine type will you consider? -> EV; 2: Simon-Kucher Market Expertise

EV considerations are misaligned with current EV infrastructure, calling for an ecosystem change

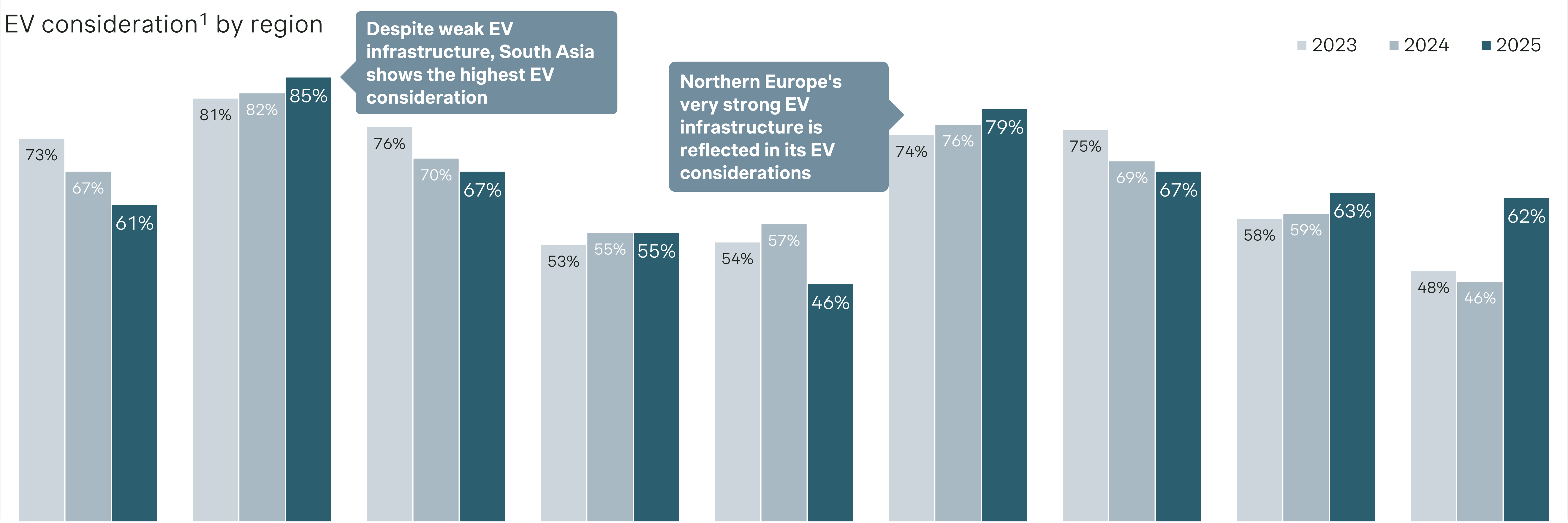
Based on prior-year study markets

EV infrastructure[2] by region

Based on external research[3]

East Asia	South Asia	Middle East	Central Europe	Southern Europe	Northern Europe	Eurasia	North America	Oceania
🟢	🔴	🔴	🟢	🟡	🟢🟢	🔴	🟡	🟡

EV consideration[1] by region



Despite weak EV infrastructure, South Asia shows the highest EV consideration

Northern Europe's very strong EV infrastructure is reflected in its EV considerations

1) Consideration defined as 5, 6, or 7 on a 1-7 scale considering the countries averages; 2) 🟢🟢 = very good, 🟢 = good, 🟡 = average, 🔴 = weak, 🔴🔴 = very weak
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); 3: IEA (2024), Global EV Outlook 2024; Q: When you think about purchasing or leasing a new vehicle, which engine type will you consider?

Premium drivers show significantly higher consideration for electric and plug-in hybrid engines, despite overall engine preferences being similar across segments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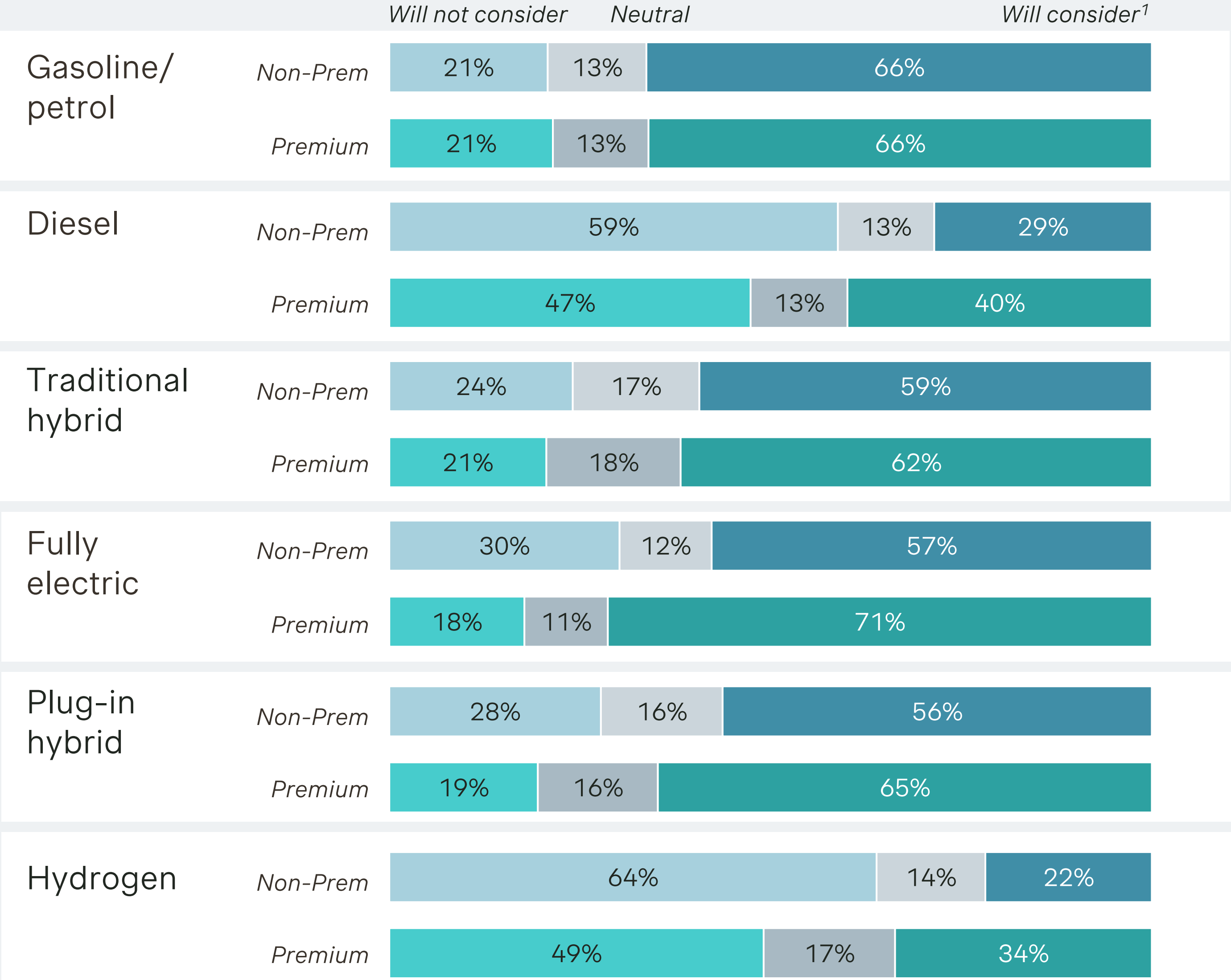
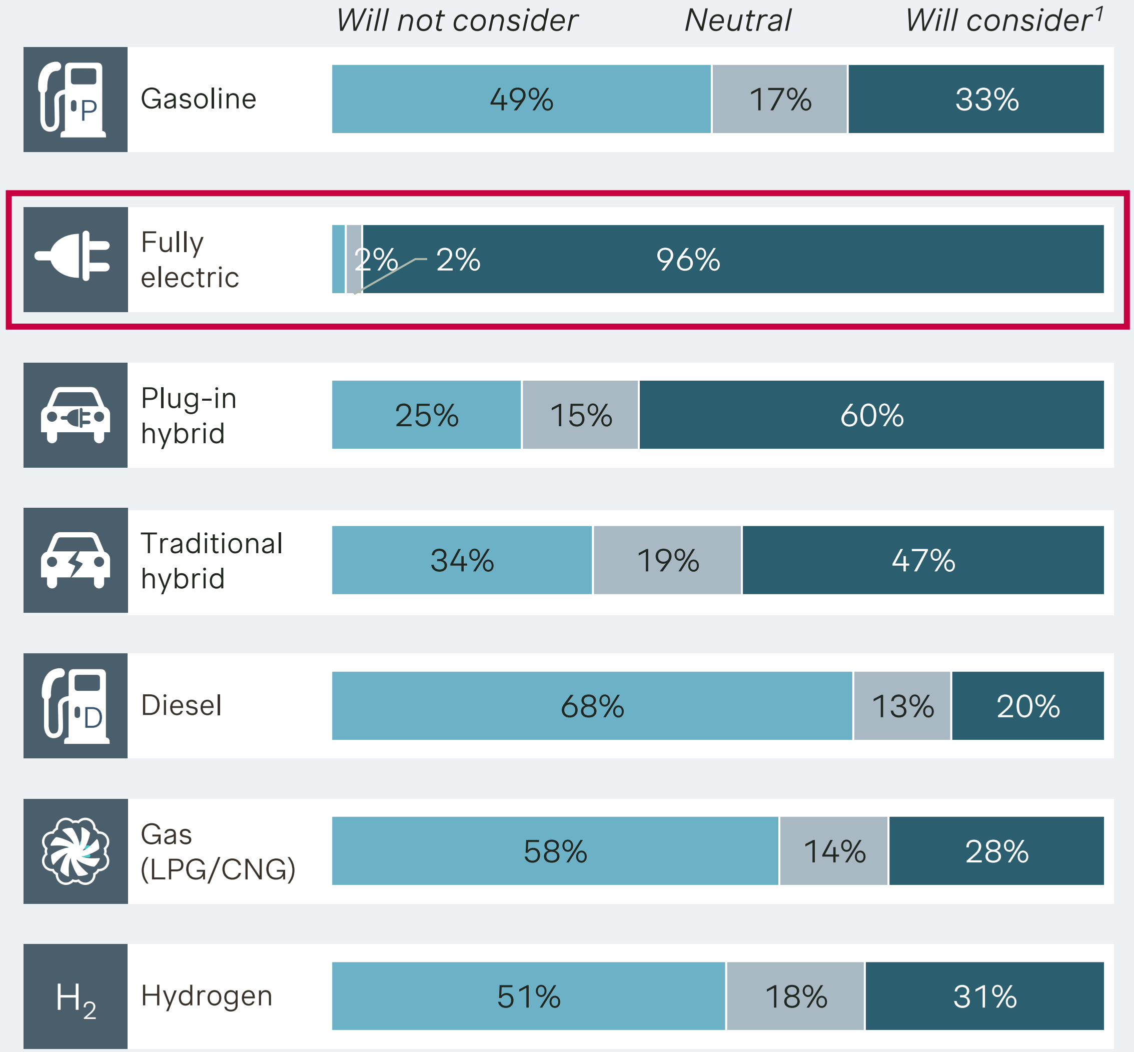
Engine type consideration among current premium & non-premium drivers



1) Consideration defined as 5, 6, or 7 on a 1-7 scale;
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about purchasing or leasing a new vehicle, which engine type will you consider?

Loyalty among current EV drivers towards fully electric engines increases from last years' 92% to even 96%

Engine type consideration among current EV drivers



96% of current **EV owners** are **likely to purchase** an **EV again**

Steady plug-in hybrid considerations

Significant drop (-12 pp) of consumer considering traditional hybrid compared to last year

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1) Consideration defined as 5, 6, or 7 on a 1-7 scale, non-consideration defined as 1, 2, or 3 on a 1-7 scale;

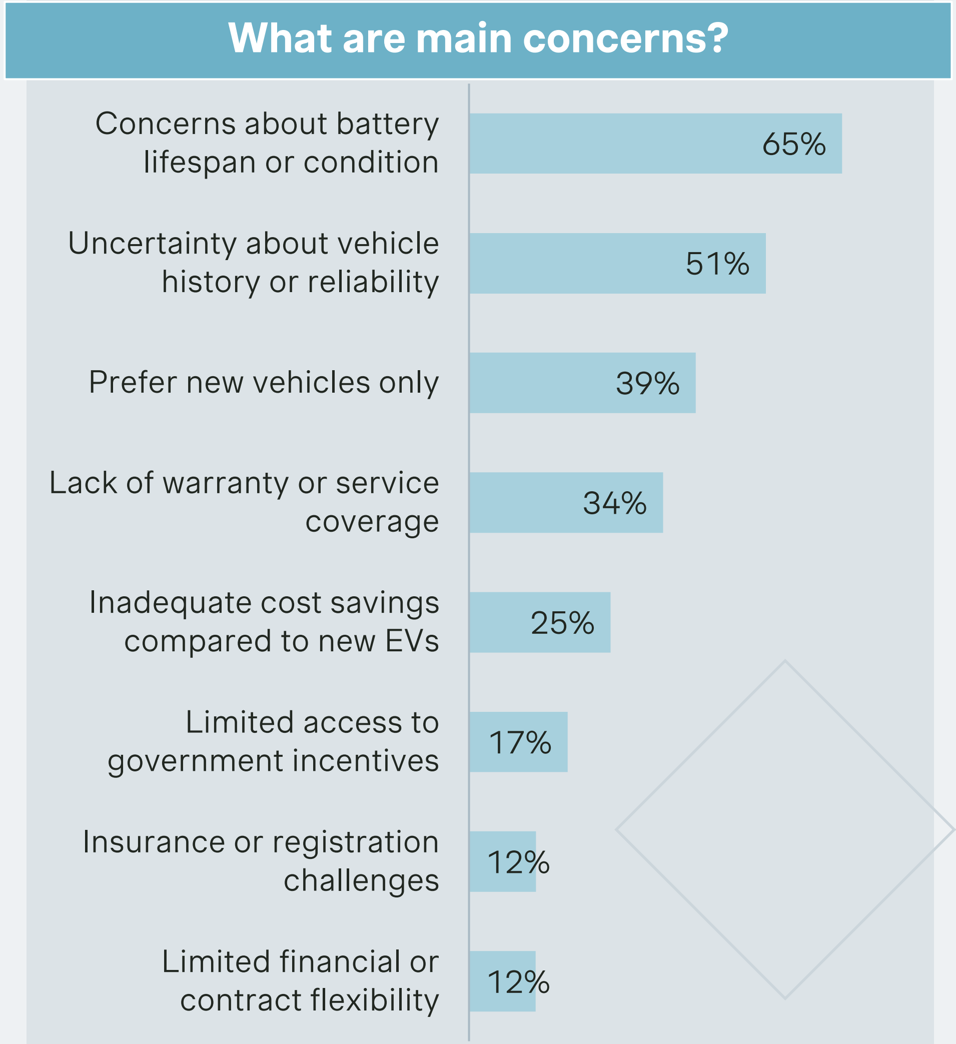
Source: Simon-Kucher Global Automotive Study, June 2025; n = 433 (overall sample size per question might vary, e.g., due to preselected answers); Q: When you think about purchasing or leasing a new vehicle, which engine type will you consider?

Majority of customers would consider leasing or buying a used EV - interest is driven by cost savings and risk mitigation, barriers are trust and durability (battery life, etc.)

Used EV purchase or lease consideration[1]

Used EV purchase consideration

Used EV leasing consideration



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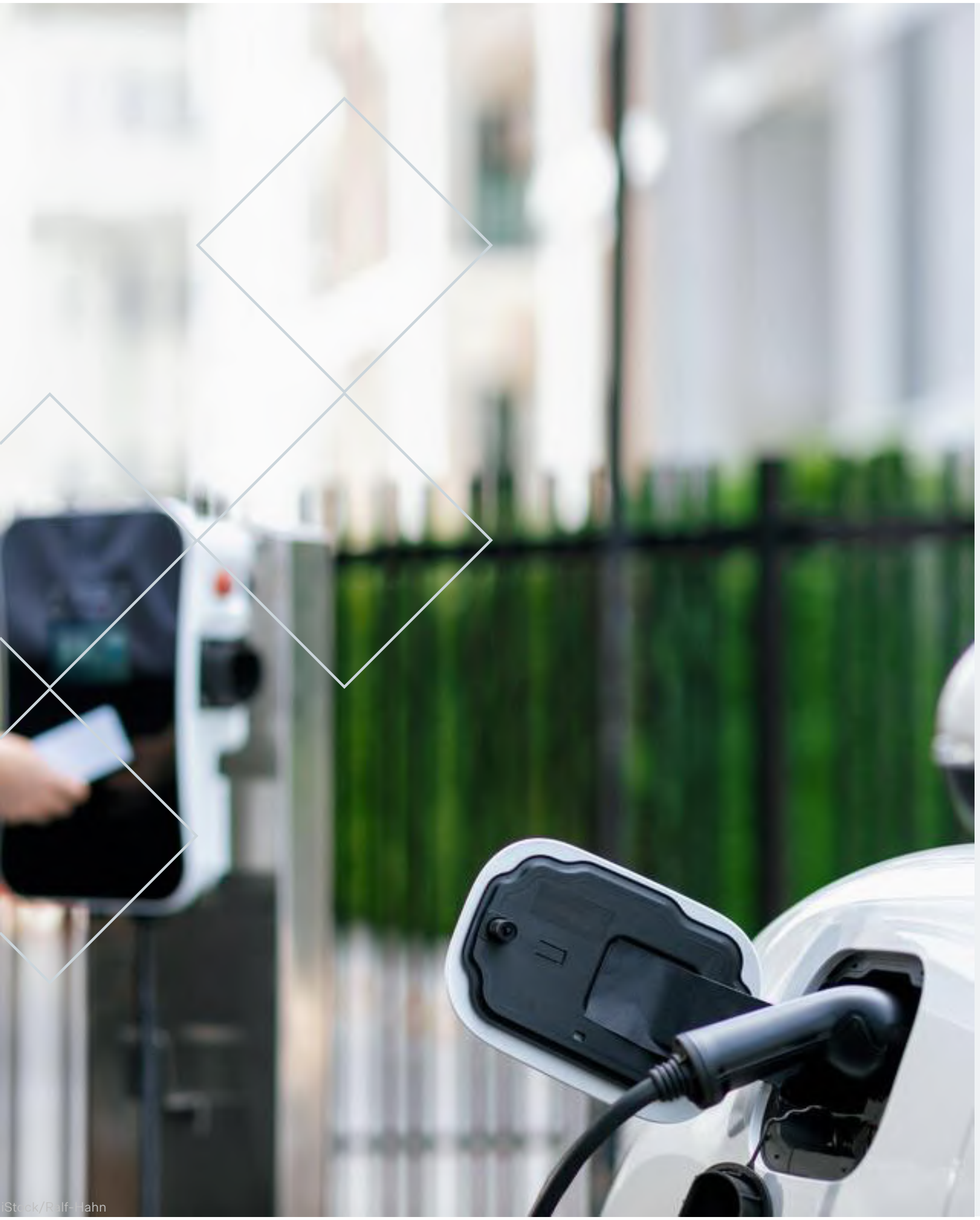
1) Consideration defined as 5-7 on a scale of 1-7; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: What makes the option of leasing or purchasing a used electric vehicle interesting to you? - Please distribute 100 points across the options. A higher number reflects a higher interest. Q: You stated that you would not consider leasing or purchasing a used electric vehicle. What are your main concerns? -Please select all that apply.

Used EVs are gaining traction – but preferences for leasing vs. buying differ widely by market, with India having the highest leasing and UAE the highest buying consideration



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Used EV considerations

	Would lease	Would buy
Australia	41%	52%
Brazil	41%	42%
Canada	30%	36%
China	43%	47%
Denmark	38%	49%
France	42%	47%
Germany	37%	40%
India	54%	47%
Italy	34%	36%
Japan	33%	34%
Mexico	44%	49%
Norway	**31%**	**40%**
Portugal	26%	40%
Saudi Arabia	52%	47%
South Korea	37%	42%
Spain	26%	32%
Turkey	35%	52%
UAE	49%	53%
United Kingdom	44%	47%
United States	37%	43%

Case Study Norway:

Although Norway has the world's most mature EV market, consumers remain hesitant to consider purchasing one.[1]

Battery-health anxiety: Rapid upgrades in range and charging speed make early-generation BEVs appear unattractive

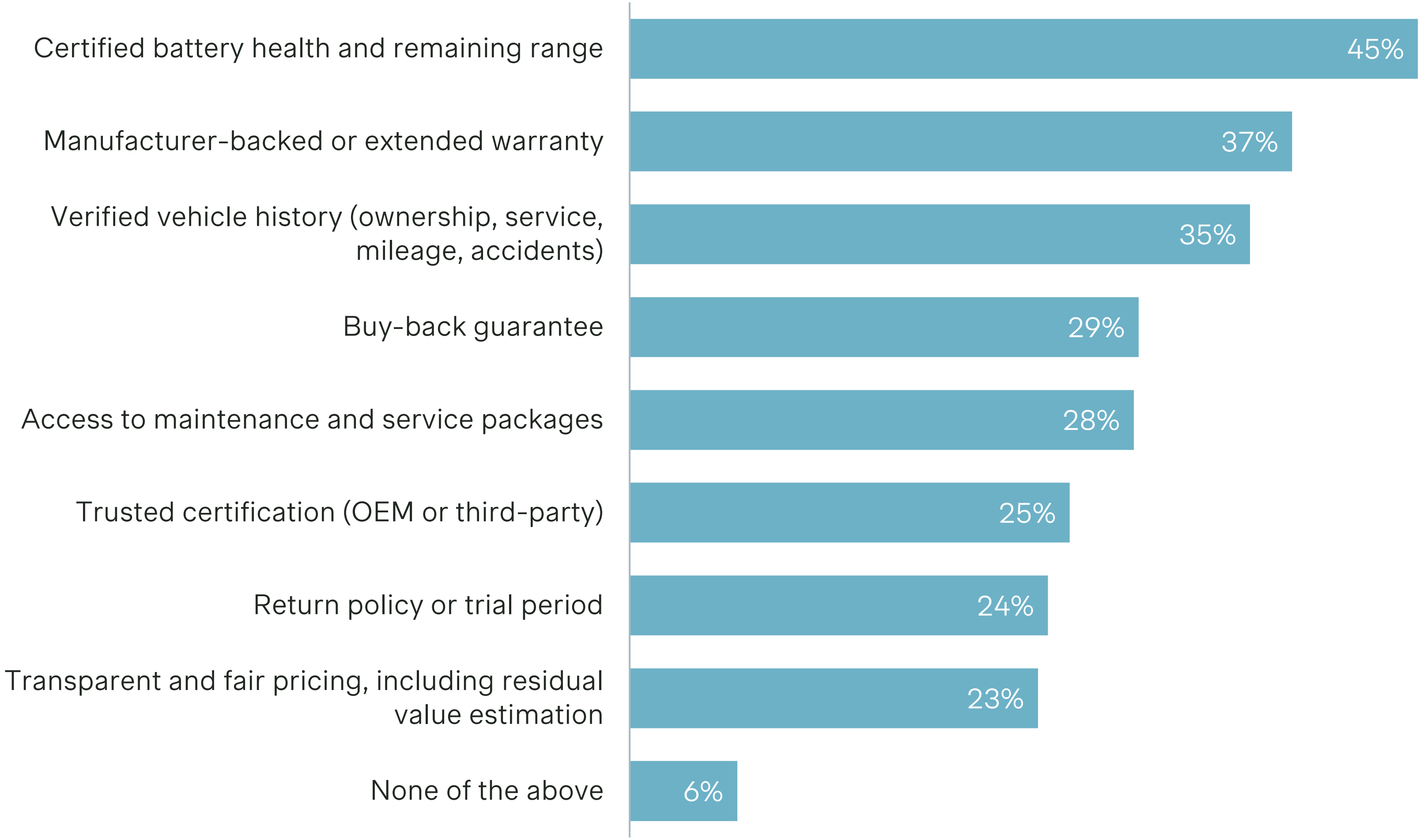
Trust gaps in used EVs: Limited transparency on vehicle history and battery condition hinders buyer confidence

Service void risk: Sparse warranty and aftersales coverage deters mainstream adoption in the second-hand market

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: How attractive is it for you to buy or lease a used electric vehicle (EV)?; 1: Simon-Kucher Expert Knowledge

Winning over used EV buyers starts with trust-building features offered by OEMs/their dealers - consumers demand transparency, assurance, and flexibility

The following guarantees or features would be considered essential when used EVs are being evaluated



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: When thinking about purchasing or leasing a used electric vehicle (EV), which of the following guarantees or features would be essential to you?

iStock/atakan

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Agenda

Key Questions

1. How have confidence, expectations, and deal decision drivers evolved globally?
2. ✓ **What defines value in a price-sensitive but experience-driven market?**
3. How should EV strategies and brand narratives adapt to diverging customer segments?
4. Where does AI support the sales journey, and where is human interaction still key?
5. ✓ **How should brands respond to China's rise, tariffs, and the used EV trust gaps?**

Brand loyalty is eroding as openness to new players rises, despite skepticism towards Chinese brands

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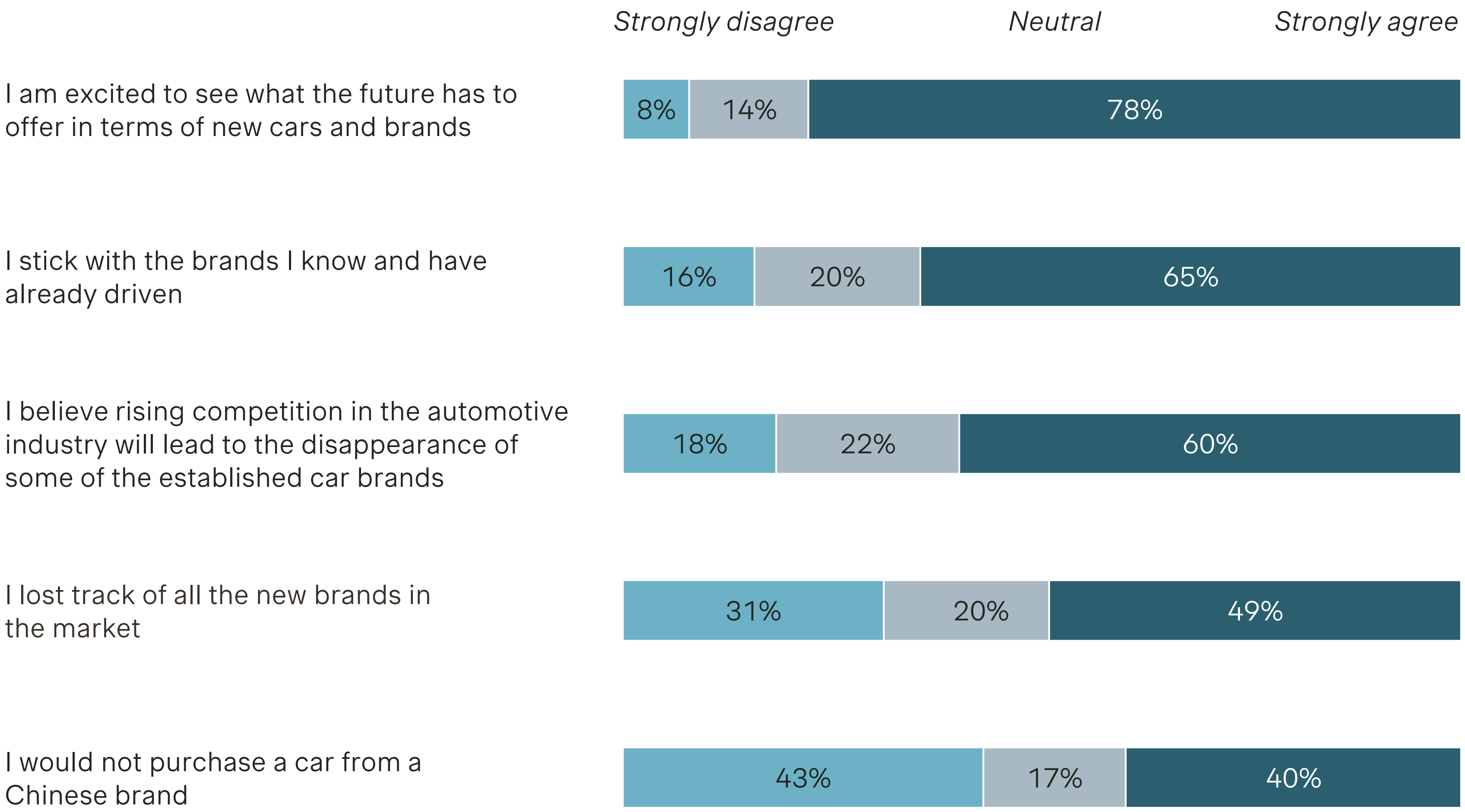
Brand considerations



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Talking about brands, how much do you agree with the following statements?

In the non-premium segment, Japanese brands dominate most of the markets' top considerations

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Brand consideration[1] by country, non-premium segment only

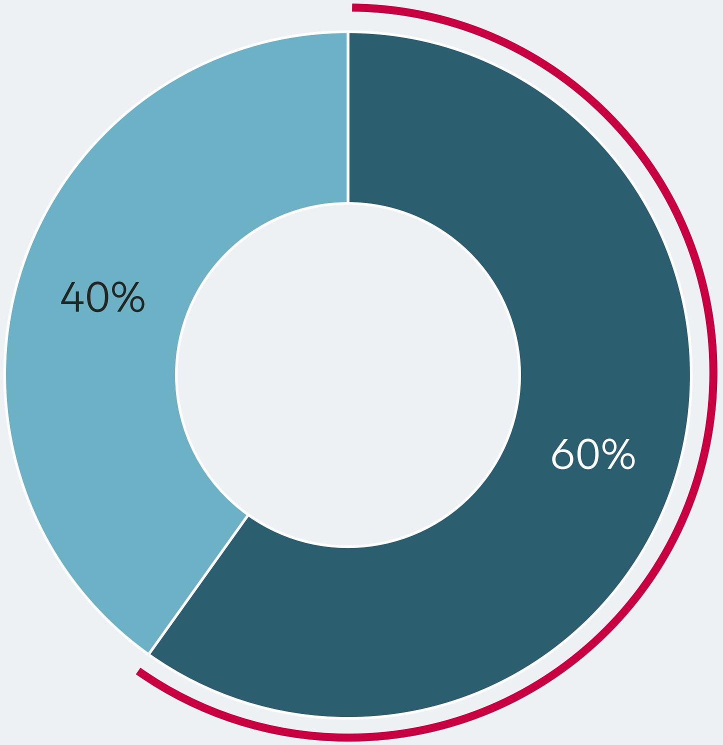
Continent	Country	#1 brand	#2 brand	#3 brand
Asia	China 🇨🇳	BYD 🇨🇳	Ford/Changan 🇺🇸	VW/SAIC 🇩🇪
	India 🇮🇳	Hyundai 🇰🇷	Mahindra 🇮🇳	Tata 🇮🇳
	Japan 🇯🇵	Toyota 🇯🇵	Honda 🇯🇵	Nissan 🇯🇵
	Saudi Arabia 🇸🇦	Toyota 🇯🇵	Ford 🇺🇸	Hyundai 🇰🇷
	South Korea 🇰🇷	Hyundai 🇰🇷	Kia 🇰🇷	Chevrolet 🇺🇸
	UAE 🇦🇪	Toyota 🇯🇵	Nissan 🇯🇵	Ford 🇺🇸
Europe	Denmark 🇩🇰	Toyota 🇯🇵	VW 🇩🇪	Skoda 🇨🇿
	France 🇫🇷	Peugeot 🇫🇷	Renault 🇫🇷	Toyota 🇯🇵
	Germany 🇩🇪	VW 🇩🇪	Skoda 🇨🇿	Ford 🇺🇸
	Italy 🇮🇹	Fiat 🇮🇹	Toyota 🇯🇵	Ford 🇺🇸
	Norway 🇳🇴	Toyota 🇯🇵	VW 🇩🇪	Hyundai 🇰🇷
	Portugal 🇵🇹	Toyota 🇯🇵	Peugeot 🇫🇷	Renault 🇫🇷
	Spain 🇪🇸	Toyota 🇯🇵	Ford 🇺🇸	Kia 🇰🇷
	Turkey 🇹🇷	Toyota 🇯🇵	Honda 🇯🇵	Ford 🇺🇸
	United Kingdom 🇬🇧	Ford 🇺🇸	Hyundai 🇰🇷	Toyota 🇯🇵
North America	United States 🇺🇸	Toyota 🇯🇵	Ford 🇺🇸	Chevrolet 🇺🇸
	Mexico 🇲🇽	Toyota 🇯🇵	Honda 🇯🇵	Ford 🇺🇸
	Canada 🇨🇦	Toyota 🇯🇵	Nissan 🇯🇵	Chevrolet 🇺🇸
South America	Brazil 🇧🇷	Chevrolet 🇺🇸	Toyota 🇯🇵	Honda 🇯🇵
Oceania	Australia 🇦🇺	Toyota 🇯🇵	Hyundai 🇰🇷	Mazda 🇯🇵

Non-premium brands: Aion, Buick, BYD, Byton, CEER, Changan, Chery, Chevrolet, Chrysler, Citroen, Cupra, Dacia, Daihatsu, Dodge, DS Automoblies, Fiat, Ford, GAC Aion, Geely, GM, GMC, Haval, Honda, Hongqi, Hyundai, Isuzu, JAC, Jeep, Kia, Lada, Lancia, Leap, Mahindra, Mazda, MG, Mitsubishi, Nissan, Opel, Peugeot, RAM, Renault, Seat, Skoda, Smart, Ssang Yong, Subaru, Suzuki, Tata, TOGG, Toyota, Vauxhaul, VinFast, VW, Wuling, Xpen;

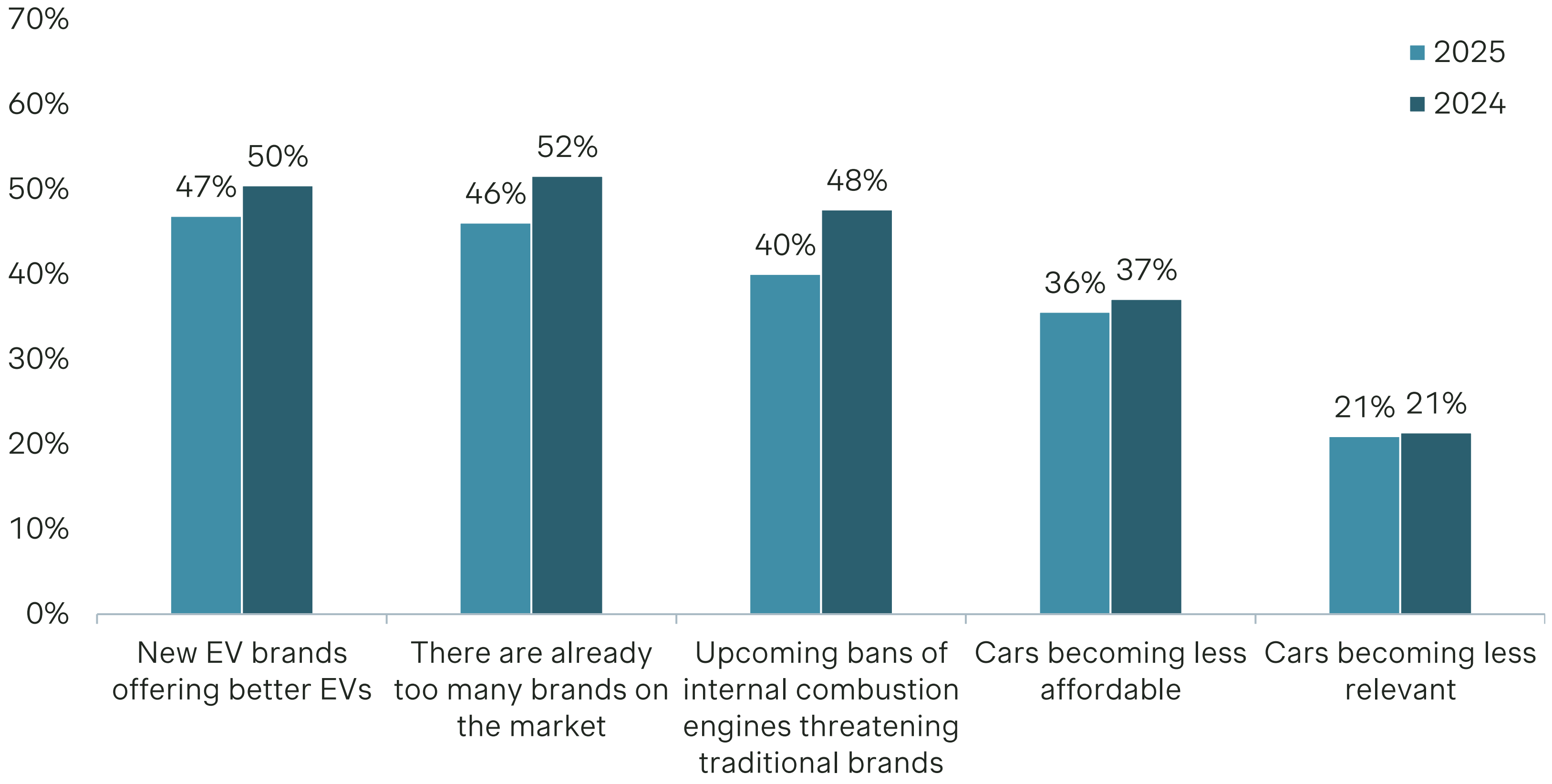
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: From which brand will you probably buy your next vehicle?

Competition from new EV brands remains a key threat, yet pressure from new EV disruptors slightly eases vs. 2024, suggesting an improved outlook for traditional brands

Established car brands will disappear due to competition[1]



Factors that contribute to this statement (multiple choice)



The risk of OEMs being pushed out of the market is gaining significance

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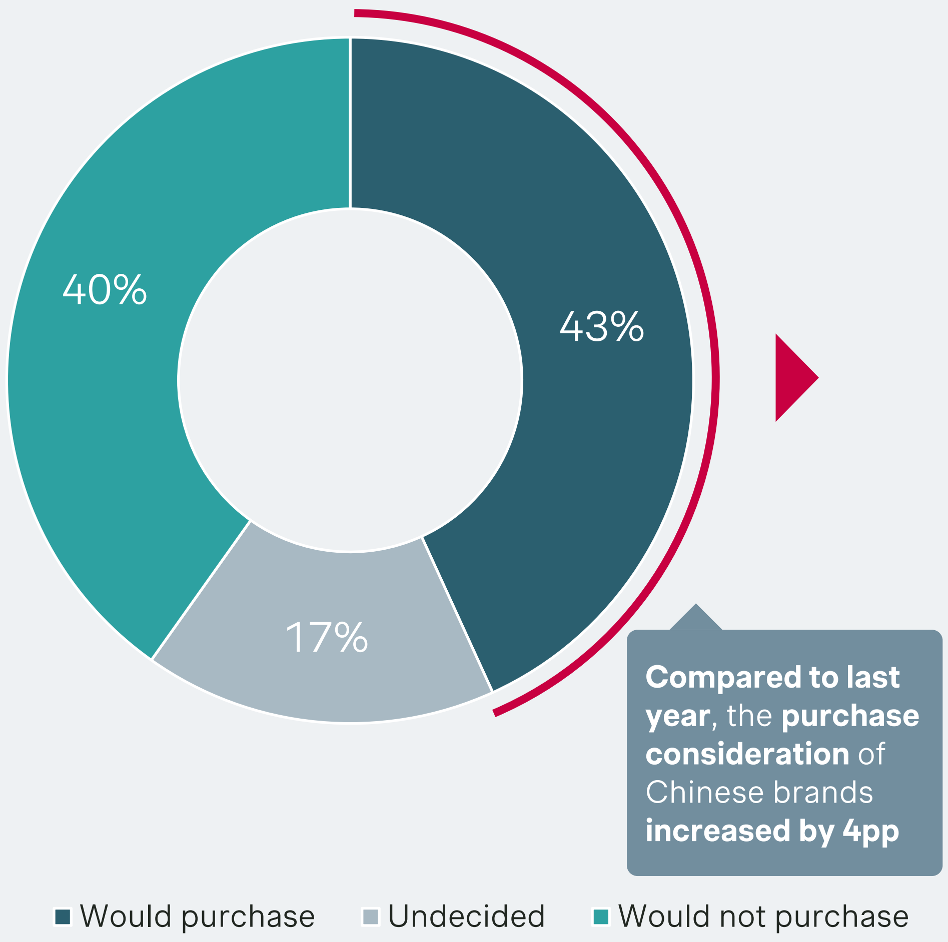
1) Agreement defined as 5, 6, or 7 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780(overall sample size per question might vary, e.g., due to preselected answers); Q: You indicated that you believe one or some of the established car brands might disappear in the near future. - What factors contribute to this statement?

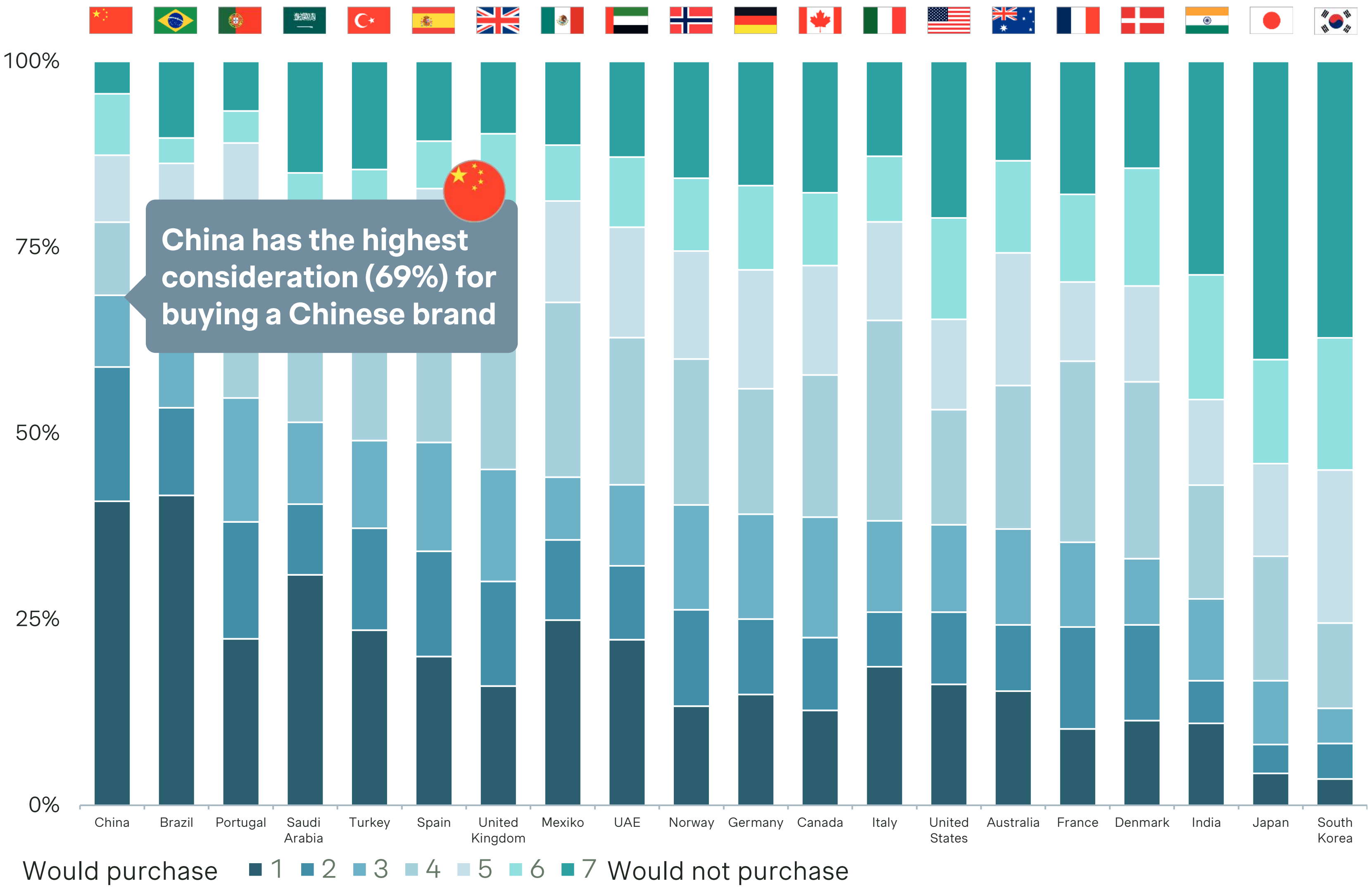
Purchase consideration for Chinese brands rises slightly, with an average consideration rate of 43% and the highest acceptance observed among Chinese respondents

Consideration[1] of Chinese brands



Compared to last year, the **purchase consideration** of Chinese brands **increased by 4pp**

Consideration[1] by country



China has the highest consideration (69%) for buying a Chinese brand

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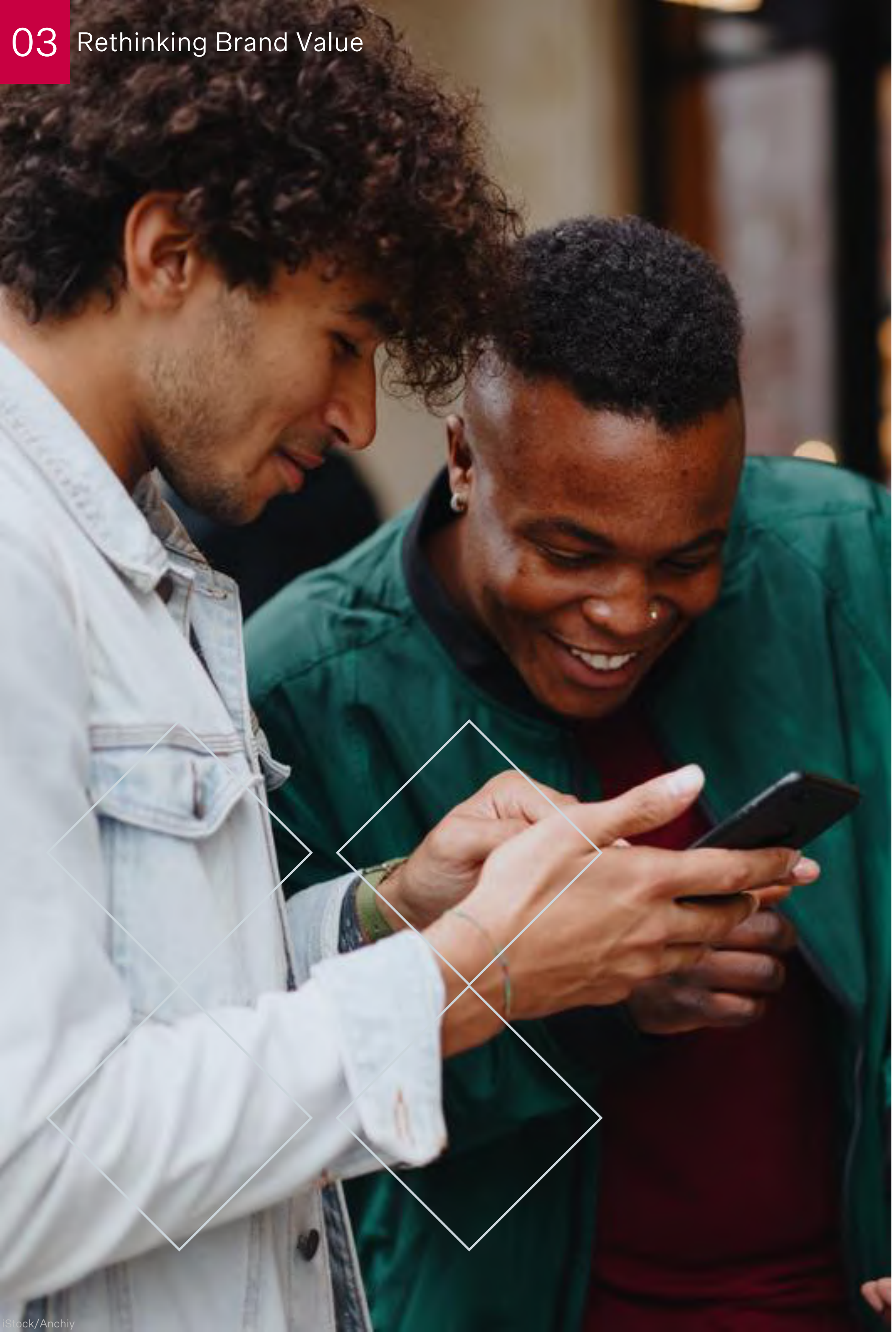
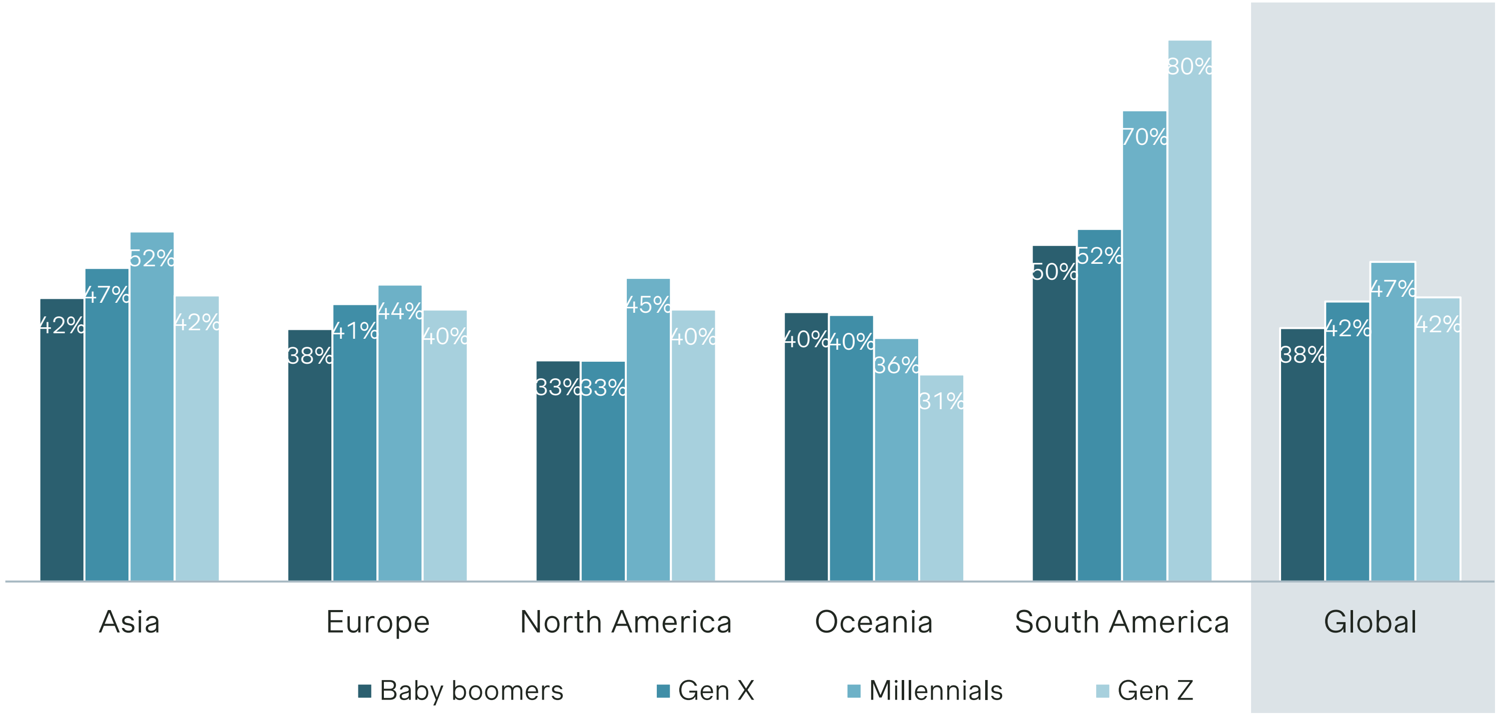
[1] Would purchase defined as 1, 2, and 3 on a 1-7 scale, undecided defined as 4 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Talking about brands, how much do you agree with the following statements? - I would not purchase a car from a Chinese brand.



iStock/Anchiy

Openness to Chinese brands varies by region, but is higher among younger generations in South America

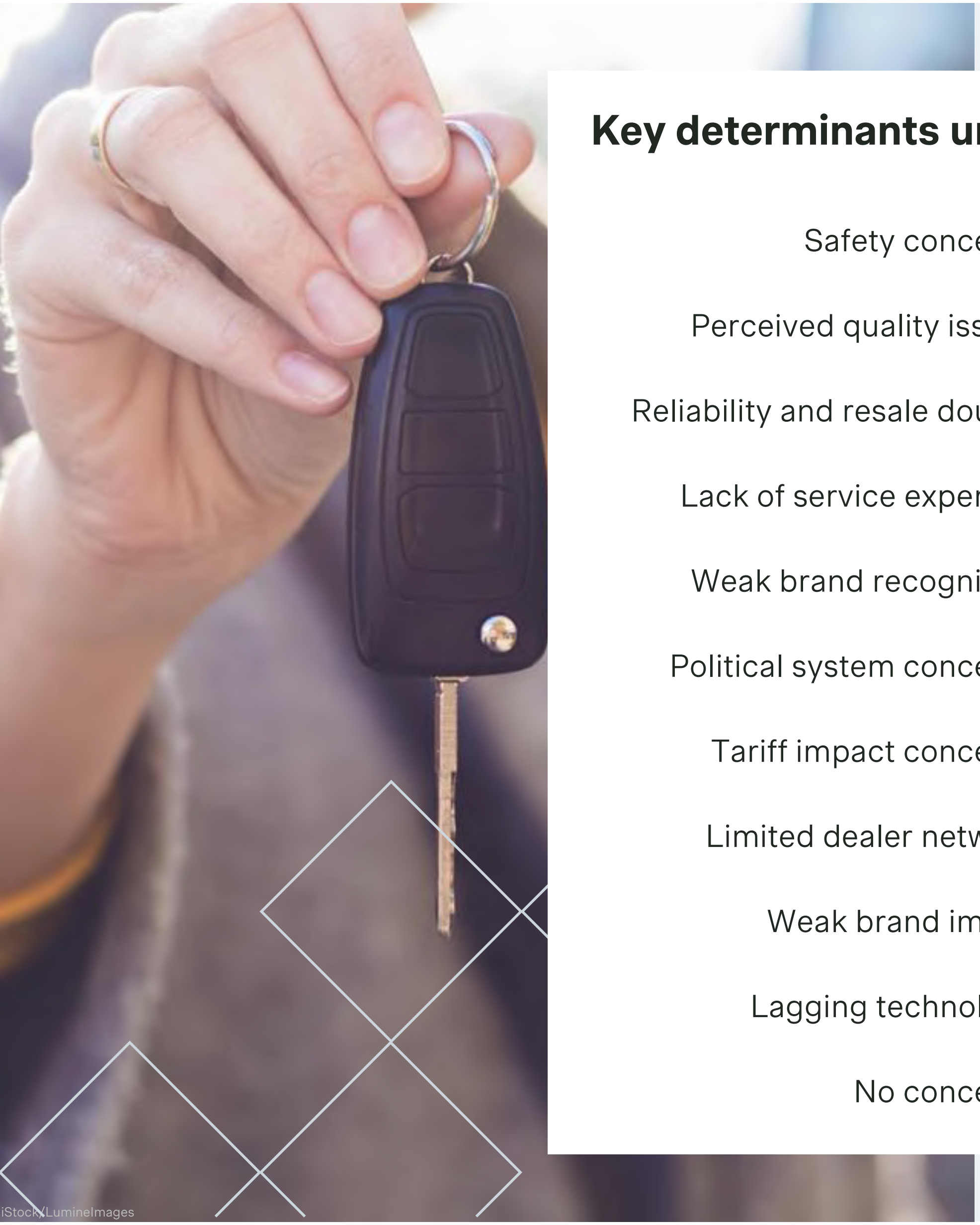
Consideration[1] of Chinese brands by market and generation[2]



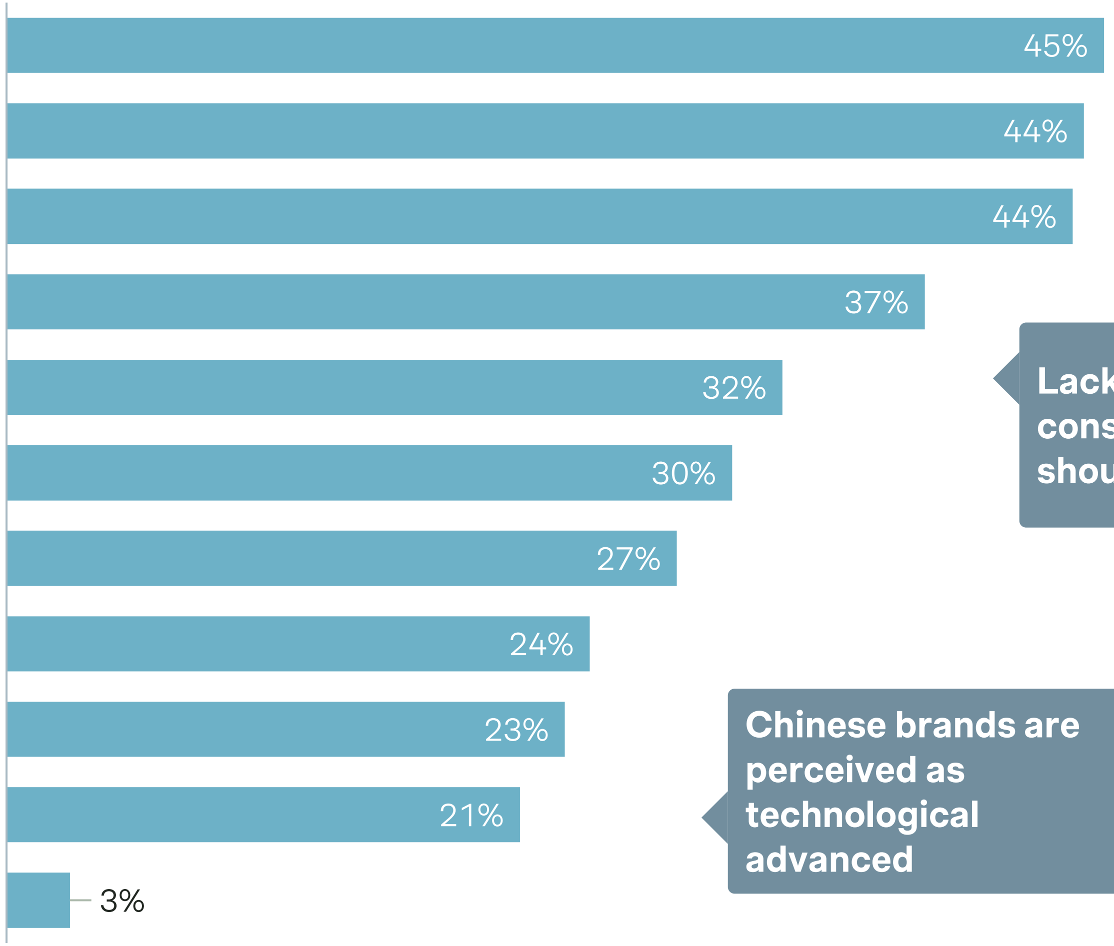
Millennials are **most open towards Chinese brands** compared to older generations

1) Consideration defined as 1, 2, 3 on a 1-7 scale; 2) Gen Z = 18-28 years, Millennials = 29-44 years, Gen X = 45-60 years, Baby Boomers = 61+ years; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Talking about brands, how much do you agree with the following statements? - I would not purchase a car from a Chinese brand

Concerns around safety, quality, and support slow down consideration for Chinese brands



Key determinants underlying the decision to refrain from purchasing a Chinese brand



Safety concerns	45%
Perceived quality issues	44%
Reliability and resale doubts	44%
Lack of service expertise	37%
Weak brand recognition	32%
Political system concerns	30%
Tariff impact concerns	27%
Limited dealer network	24%
Weak brand image	23%
Lagging technology	21%
No concerns	3%

Chinese brands face severe concerns regarding safety, quality, and service

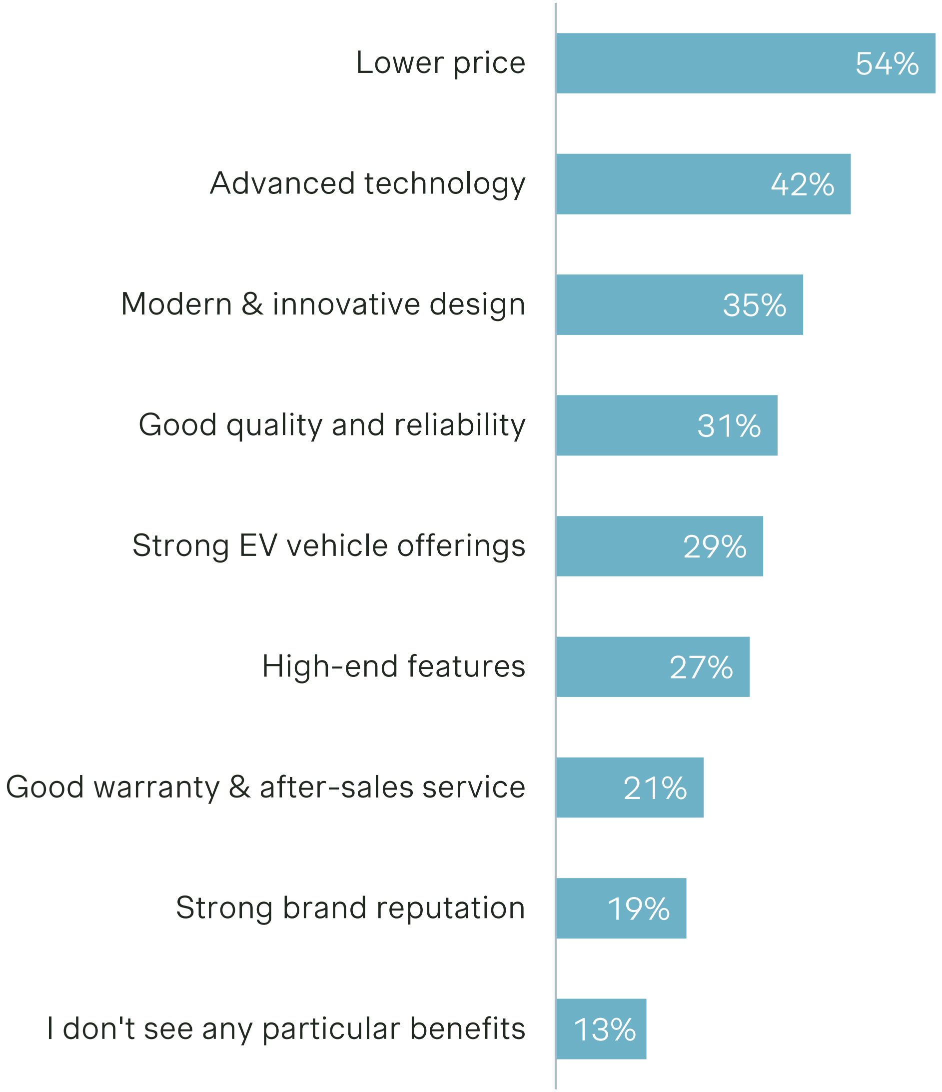
Lack of reputation and consumer knowledge should not be ignored

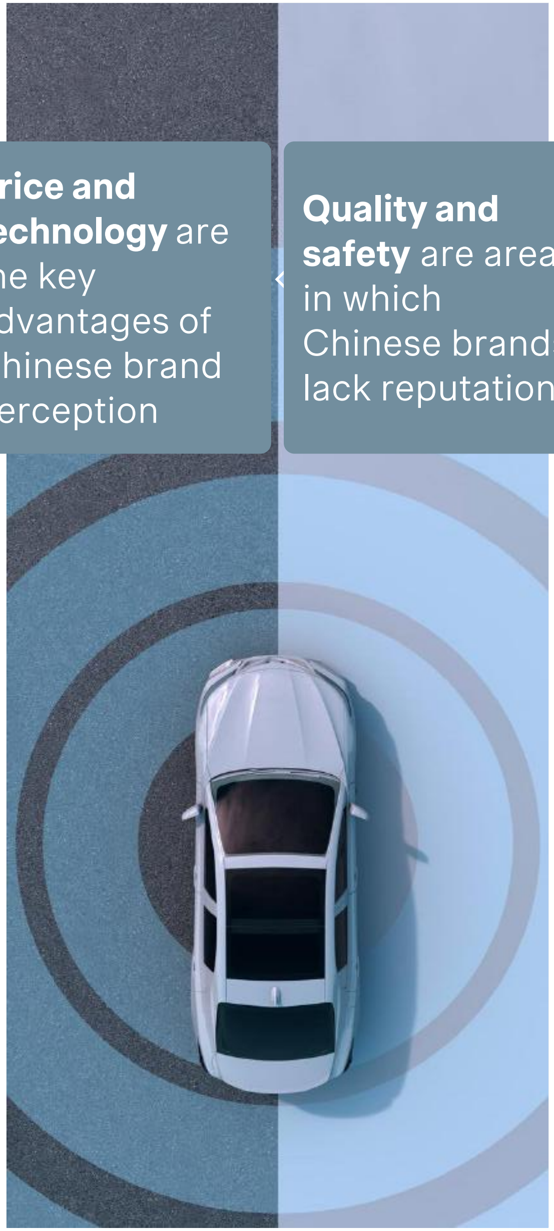
Chinese brands are perceived as technological advanced

Source: Simon-Kucher Global Automotive Study, June 2025; n = 2,679 (overall sample size per question might vary, e.g., due to preselected answers); Q: You indicated that you would not purchase a car from a Chinese brand. What factors contribute to this statement?

To win global buyers, Chinese brands must pair affordability with quality and service upgrades

Areas in which Chinese OEMs are already demonstrating strong performance

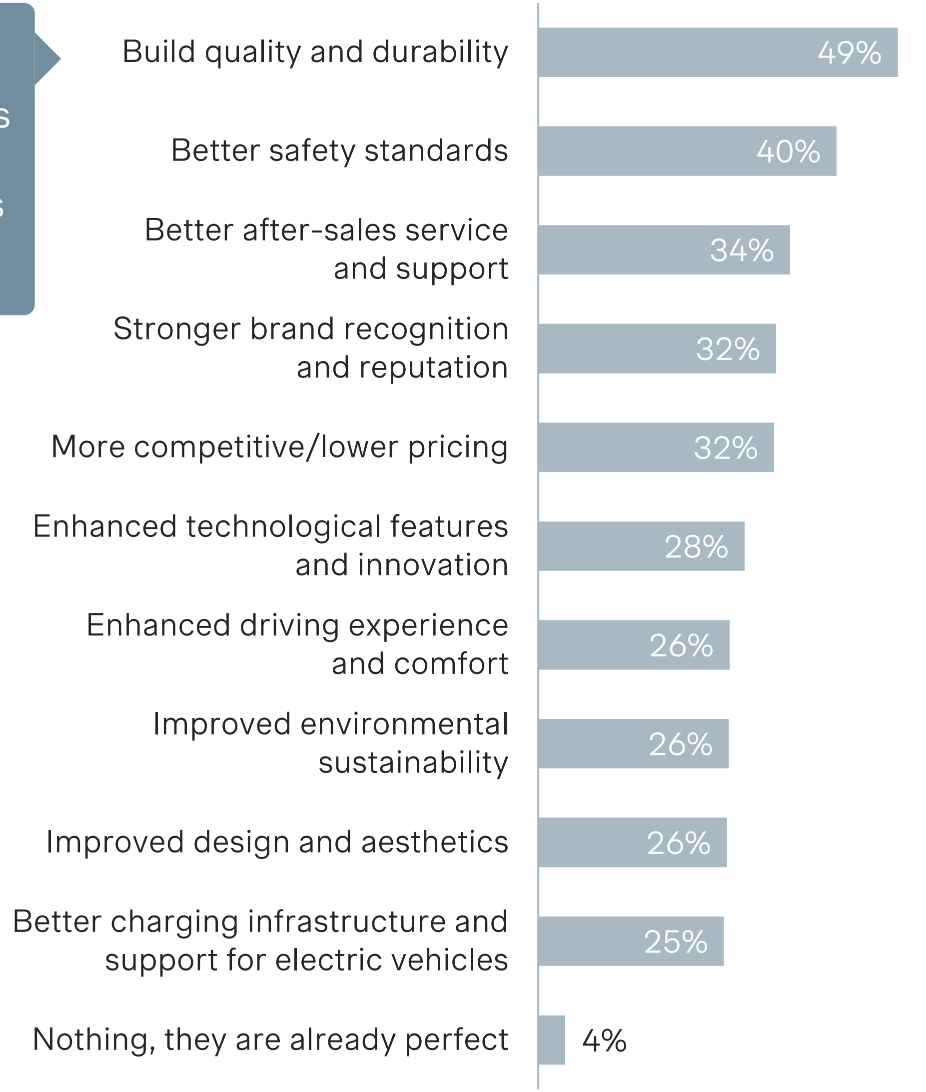




Price and technology are the key advantages of Chinese brand perception

Quality and safety are areas in which Chinese brands lack reputation

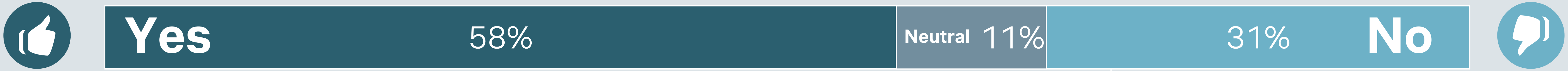
Areas in which Chinese OEMs are required to close perceived performance gaps



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Talking about brands, how much do you agree with the following statements? Q: Where do you see the biggest benefits of a car from a Chinese manufacturer? Q: What aspects could Chinese brands improve to be (even) more attractive to you?

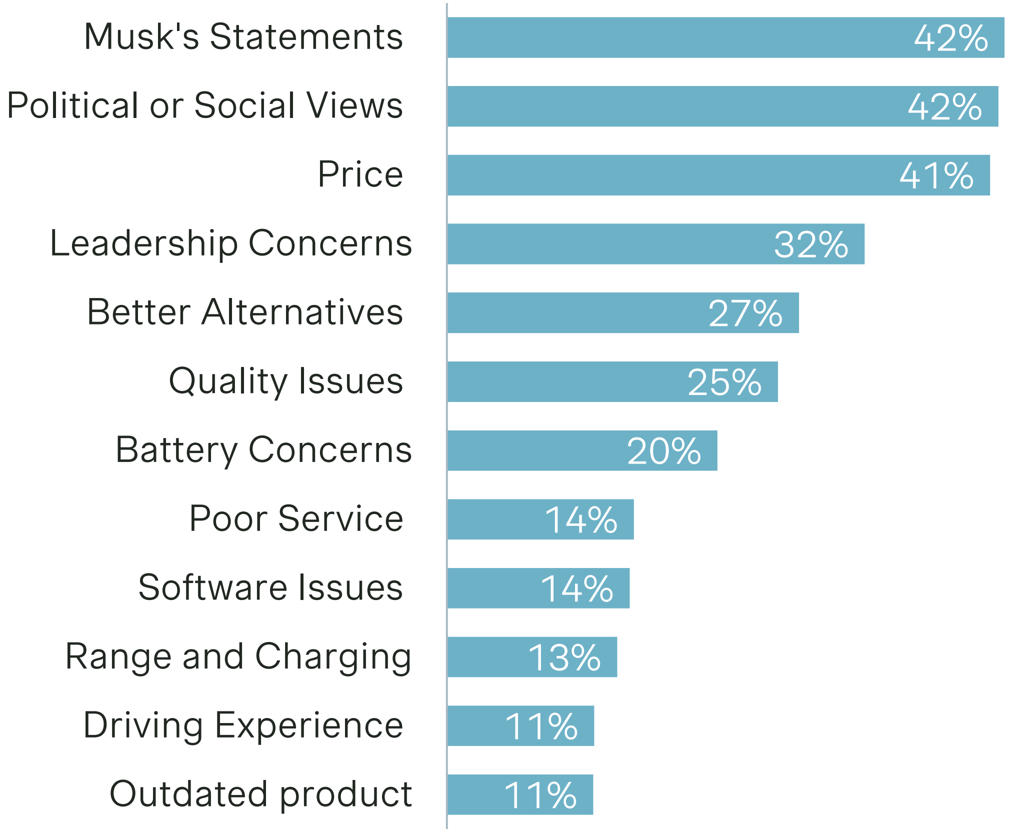
31% of customers that are considering buying an EV would not consider buying a Tesla

Tesla buying considerer[1]



Main reasons for consideration

Main reasons for not choosing a Tesla



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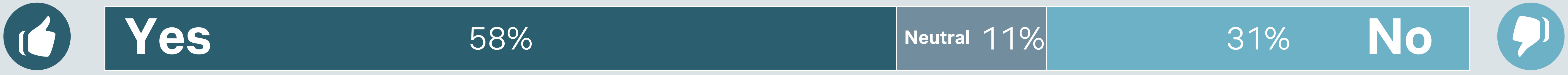
1) Considerer defined as 1-3 and Acceptors defined as 1-4 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,082 (overall sample size per question might vary, e.g., due to preselected answers); Q:You are considering an electric vehicle (EV) as your next car but are not considering a Tesla as your next vehicle. What are the main reasons you would not choose a Tesla? Q: You are considering an electric vehicle (EV) as your next car, and Tesla is among the brands you are considering. What are the main reasons you are considering a Tesla?

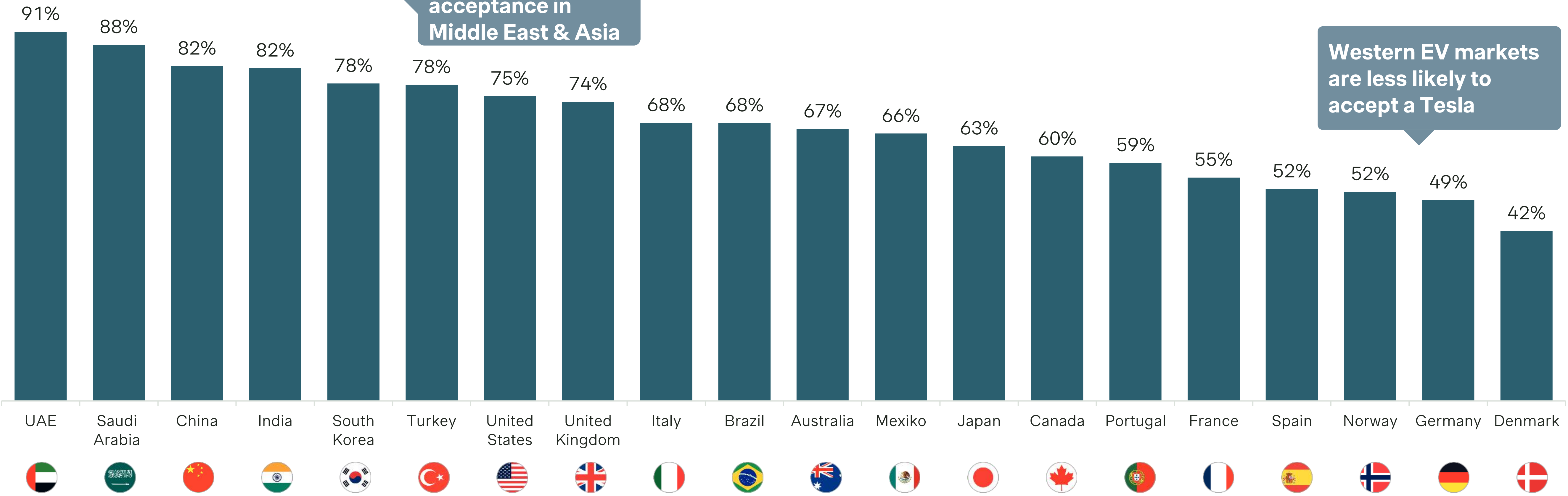
To sustain global momentum, Tesla must reinforce brand appeal in Western EV markets

Tesla buying considerer[1]



Especially high acceptance in Middle East & Asia

Western EV markets are less likely to accept a Tesla



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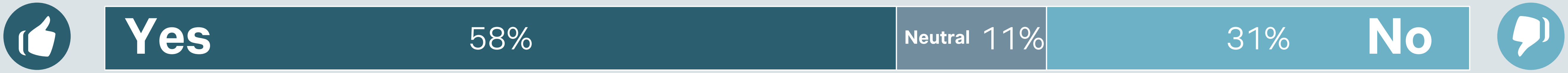
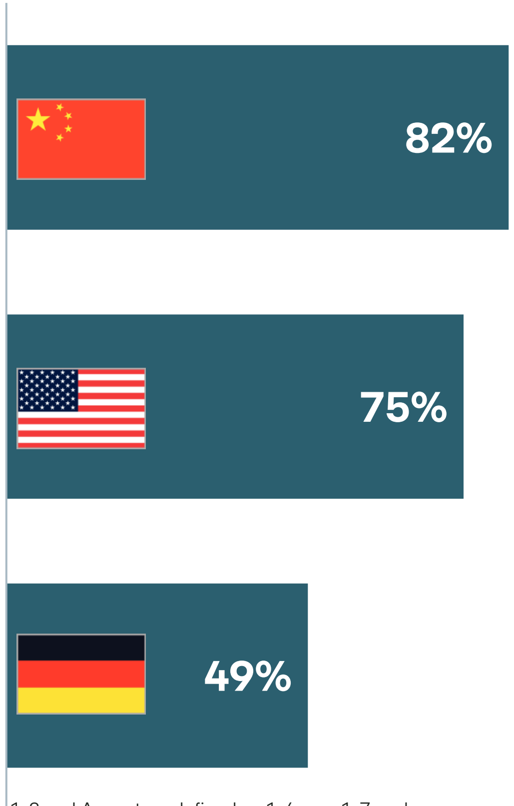
[1] Considerer defined as 1-3 and Acceptors defined as 1-4 on a 1-7 scale

Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,082 (overall sample size per question might vary, e.g., due to preselected answers); Q:You are considering an electric vehicle (EV) as your next car, but are not considering a Tesla as your next vehicle?

The level of consideration for Tesla differs across countries, as do the motivations for and against buying one

Tesla buying considerer[1]





		#1	#2	#3
China	**Yes**	Good quality	Range and charging	Innovative product
	No	Battery concerns	Better alternatives	Price
United States	**Yes**	Good quality	Innovative product	Leading brand
	No	Political or social views	Musk's controversial statements	Price
Germany	**Yes**	Good quality	Range and charging	Price
	No	Political or social views	Musk's controversial statements	Price

[1]) Considerer defined as 1-3 and Acceptors defined as 1-4 on a 1-7 scale

Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,082 (overall sample size per question might vary, e.g., due to preselected answers); Q:You are considering an electric vehicle (EV) as your next car, but are not considering a Tesla as your next vehicle. What are the main reasons you would not choose a Tesla? Q: You are considering an electric vehicle (EV) as your next car, and Tesla is among the brands you are considering. What are the main reasons you are considering a Tesla?

Reasons against buying a Tesla are often linked to leadership controversies with Tesla's CEO Elon Musk – not product or performance

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Continent	Country	#1 reason	#2 reason	#3 reason
Asia	China	Battery Concerns	Better Alternatives	Price
	India	Price	Better Alternatives	Musk's Statements
	Japan	Price	Musk's Statements	Battery Concerns
	Saudi Arabia	Price	Battery Concerns	Better Alternatives
	South Korea	Musk's Statements	Battery Concerns	Price
	UAE	Price	Better Alternatives	Quality Issues
Europe	Denmark	Political or Social Views	Musk's Statements	Leadership Concerns
	France	Musk's Statements	Price	Political or Social Views
	Germany	Political or Social Views	Musk's Statements	Price
	Italy	Price	Political or Social Views	Musk's Statements
	Norway	Political or Social Views	Musk's Statements	Leadership Concerns
	Portugal	Musk's Statements	Price	Political or Social Views
	Spain	Musk's Statements	Price	Leadership Concerns
	Turkey	Price	Better Alternatives	Musk's Statements
	United Kingdom	Political or Social Views	Musk's Statements	Price
North America	United States	Political or Social Views	Musk's Statements	Price
	Mexico	Price	Musk's Statements	Political or Social Views
	Canada	Price	Musk's Statements	Political or Social Views
South America	Brazil	Price	Political or Social Views	Musk's Statements
Oceania	Australia	Political or Social Views	Musk's Statements	Price

Technology Concerns   Price Sensitivity   Leadership Controversy

Price is a big reason against buying a Tesla in Asia

Leadership controversies are a major reason why consumer in North America and Europe are not buying a Tesla

COLOURBOX/ifeelstock

Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,082 (overall sample size per question might vary, e.g., due to preselected answers); Price Sensitivity: Price, Better Alternatives; Technology Concerns: Battery Concerns, Quality Issues; Leadership Controversy: Musk's Controversial Statements, Leadership Concerns (Musk); Value Misalignment: Political or Social Views

Reasons for buying a Tesla in different countries closely related to the product quality

Continent	Country	#1 reason	#2 reason	#3 reason
Asia	China	Good Quality	Range and Charging	Innovative product
	India	Good Quality	Innovative product	Battery Confidence
	Japan	Innovative product	Good Quality	Reliable Service
	Saudi Arabia	Good Quality	Leading Brand	Innovative product
	South Korea	Leading Brand	Good Quality	Innovative product
	UAE	Good Quality	Battery Confidence	Innovative product
Europe	Denmark	Driving Experience	Good Quality	Range and Charging
	France	Good Quality	Range and Charging	Price
	Germany	Good Quality	Range and Charging	Price
	Italy	Innovative product	Good Quality	Leading Brand
	Norway	Good Quality	Driving Experience	Battery Confidence
	Portugal	Good Quality	Innovative product	Range and Charging
	Spain	Good Quality	Range and Charging	Leading Brand
	Turkey	Good Quality	Leading Brand	Strong Software
	United Kingdom	Innovative product	Good Quality	Battery Confidence
North America	United States	Good Quality	Innovative product	Leading Brand
	Mexico	Good Quality	Innovative product	Leading Brand
	Canada	Good Quality	Innovative product	Battery Confidence
South America	Brazil	Reliable Service	Good Quality	Price
Oceania	Australia	Good Quality	Innovative product	Strong Software

Product Quality Innovation & Software Brand Strength Performance Price Perception

Performance topics are a main reason in Europe for buying a Tesla compared to other regions

Innovation & Software topics are ranked particularly high in North America

COLOURBOX/ifeelstock

Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,082 (overall sample size per question might vary, e.g., due to preselected answers); Product Quality: Good Quality, Reliable Service, Battery Confidence; Innovation & Software: Innovative Product, Strong Software; Brand Strength: Leading Brand; Performance: Driving Experience, Range and Charging; Price Perception: Price

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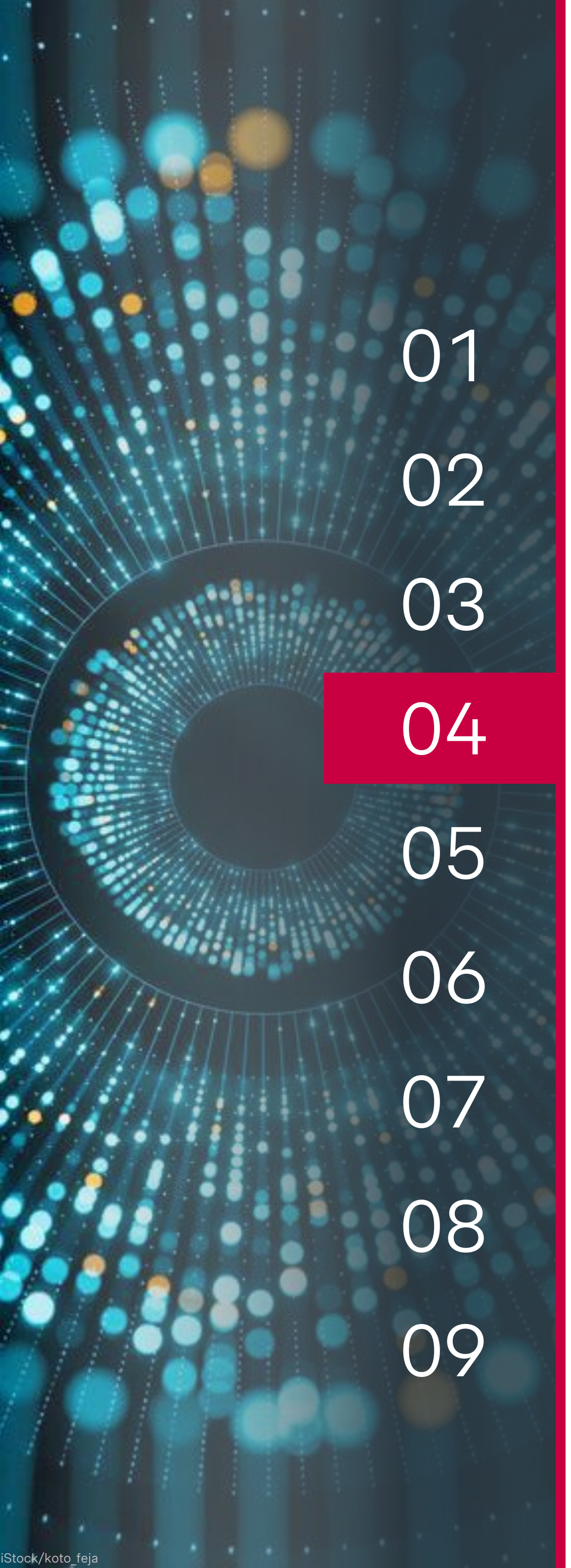
Agenda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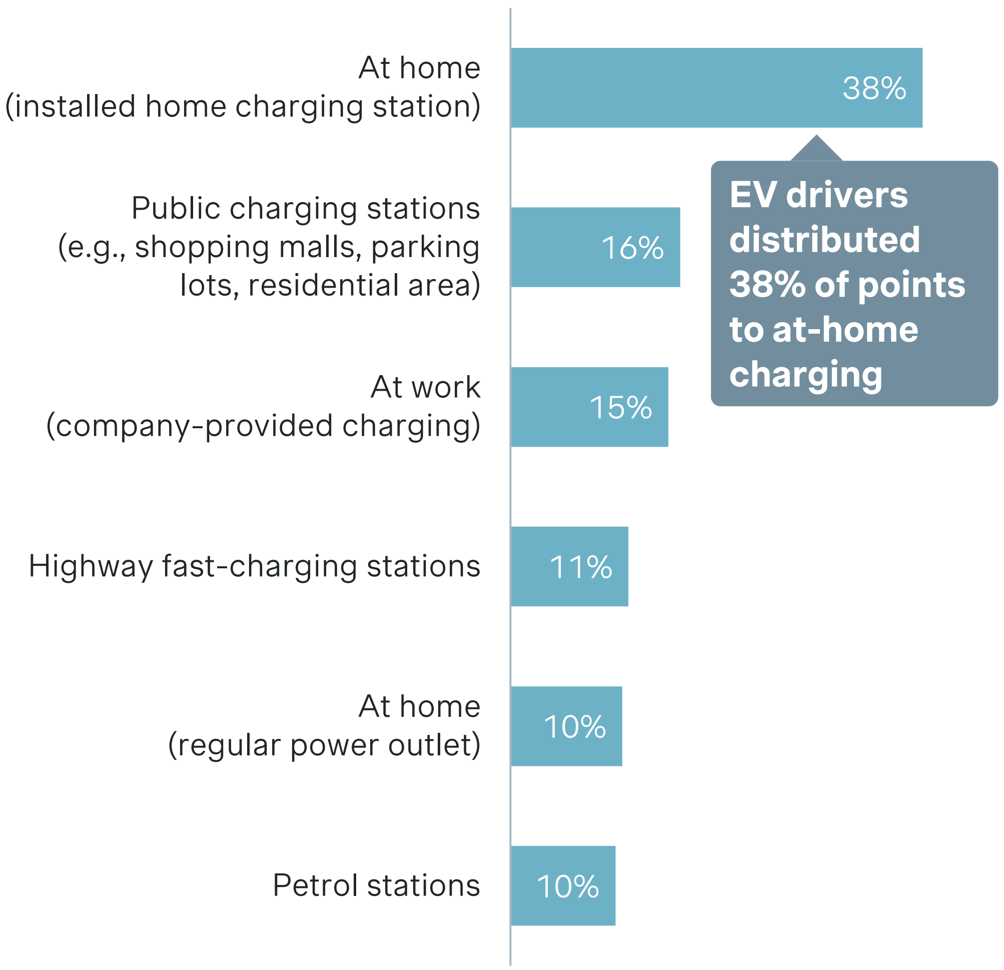
Key Questions

1. How have confidence, expectations, and deal decision drivers evolved globally?
2. ✓ **What defines value in a price-sensitive but experience-driven market?**
3. ✓ **How should EV strategies and brand narratives adapt to diverging customer segments?**
4. Where does AI support the sales journey, and where is human interaction still key?
5. How should brands respond to China's rise, tariffs, and the used EV trust gaps?

EV charging behavior and infrastructure availability: Home charging is key, but many rely on public options

Primary EV charging points for EV owners

(Respondents who currently drive an EV)



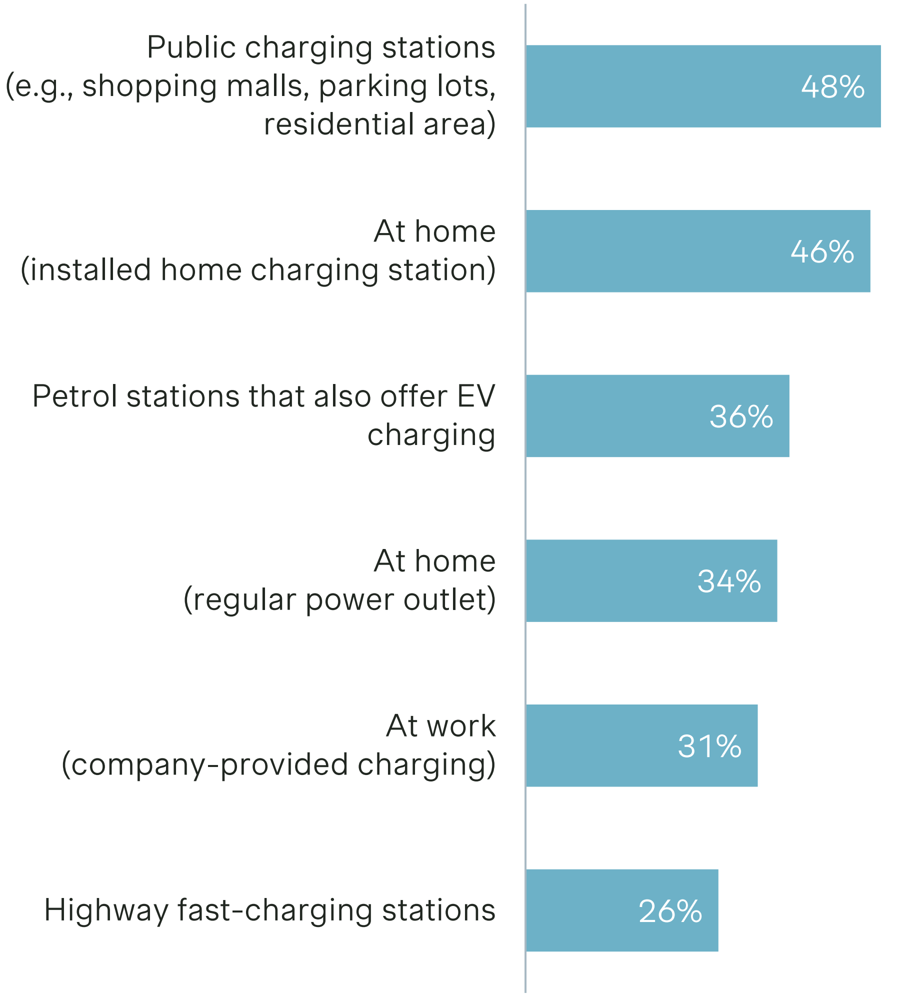
EV drivers distributed 38% of points to at-home charging

iStock/Phynart-Studio

Realistic availability of charging stations for EV considerers (multiselect)

Availability of charging points for EV considerers

(Respondents who are planning to drive an EV)



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 and n= 4,188 (overall sample size per question might vary, e.g., due to preselected answers); Q: Where do you primarily charge your electric vehicle? Please distribute 100 points across the items. A higher number reflects a higher importance.; Q: Which of the following charging options would realistically be available to you if you owned an electric vehicle? Please select all that apply.

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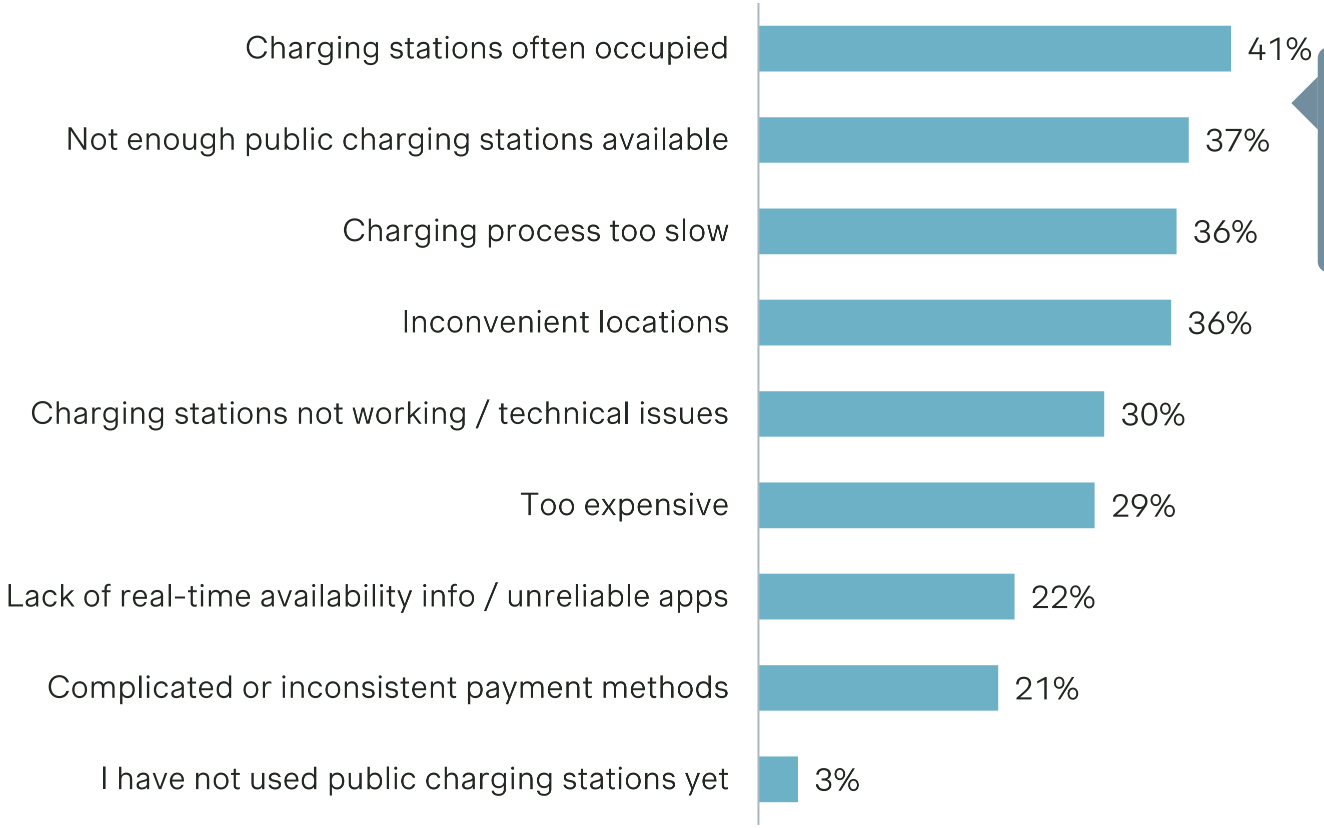
Key challenges in EV charging are availability and speed; tackling these challenges will make EVs much more attractive

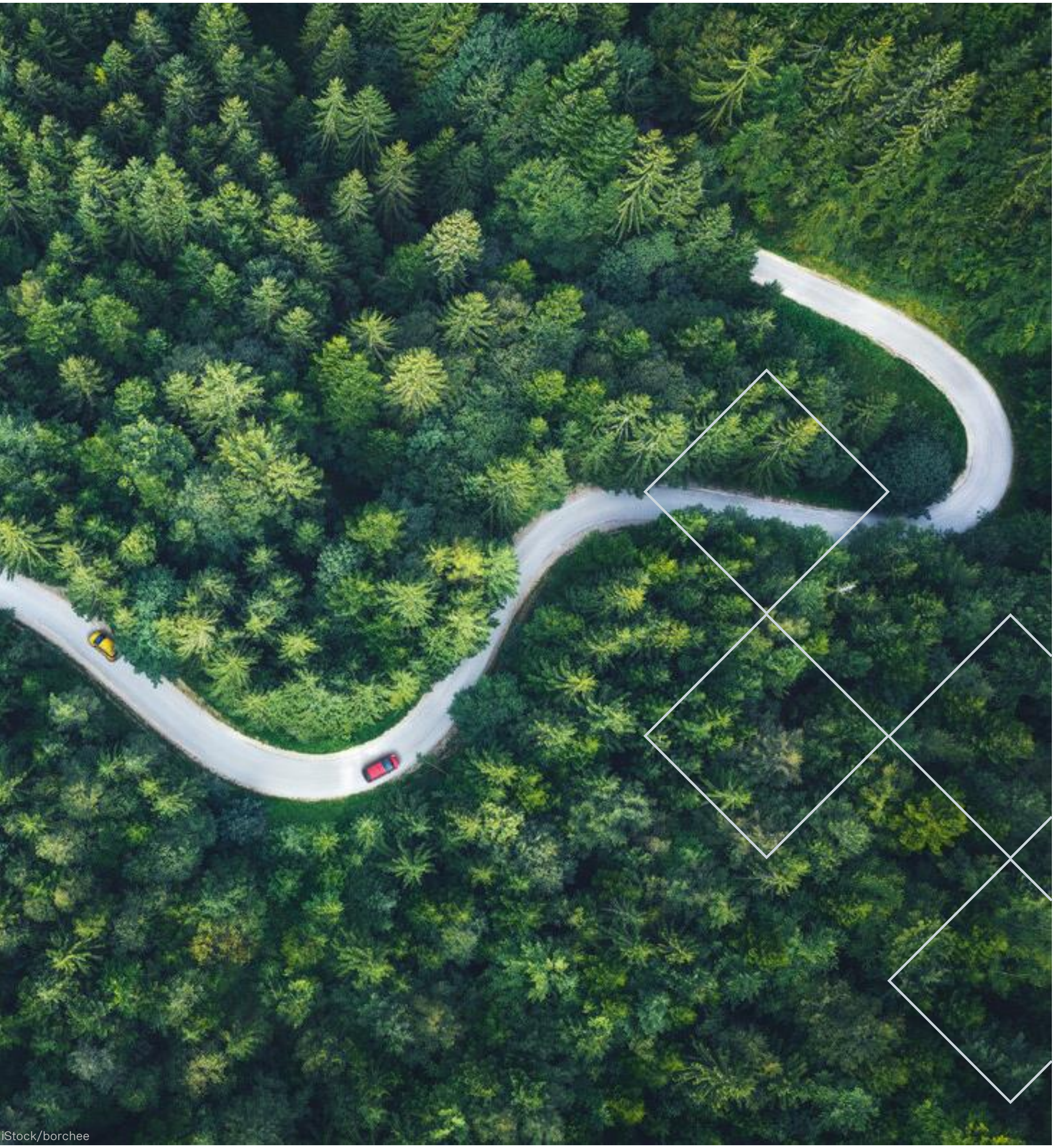
Main pain points with charging stated by current BEV and PHEV drivers



Infrastructure topics seem to be major pain points

Source: Simon-Kucher Global Automotive Study, June 2025; n = 853 (overall sample size per question might vary, e.g., due to preselected answers); Q: Thinking about your experience with public charging infrastructure so far: What have been your biggest challenges or pain points? - Please select all that apply.

2 out of 3 customers would consider a model with Range Extender (REX) for longer trips, highlighting its importance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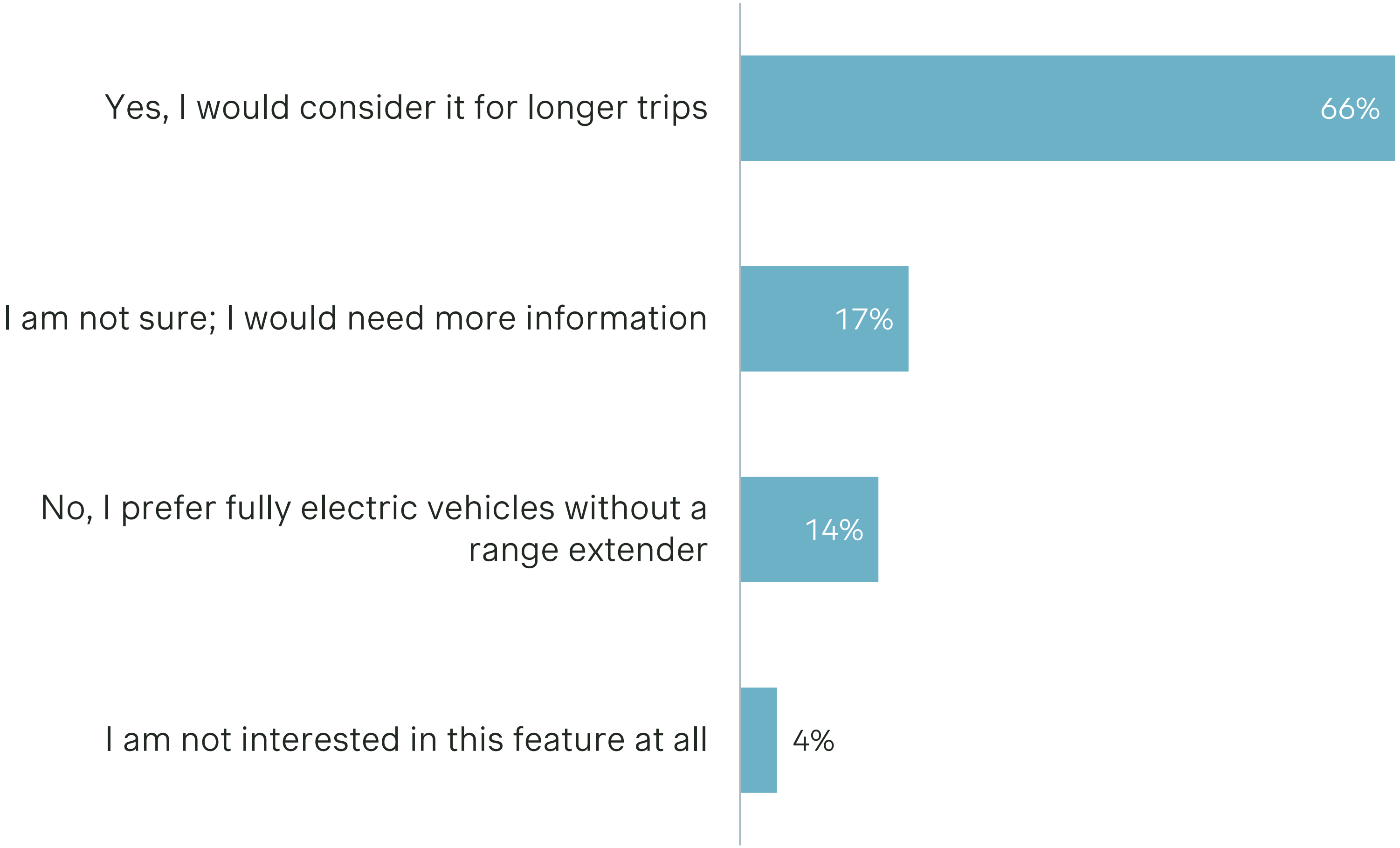
Respondents who would consider owning a Model with Range Extender (REX)* to increase driving range

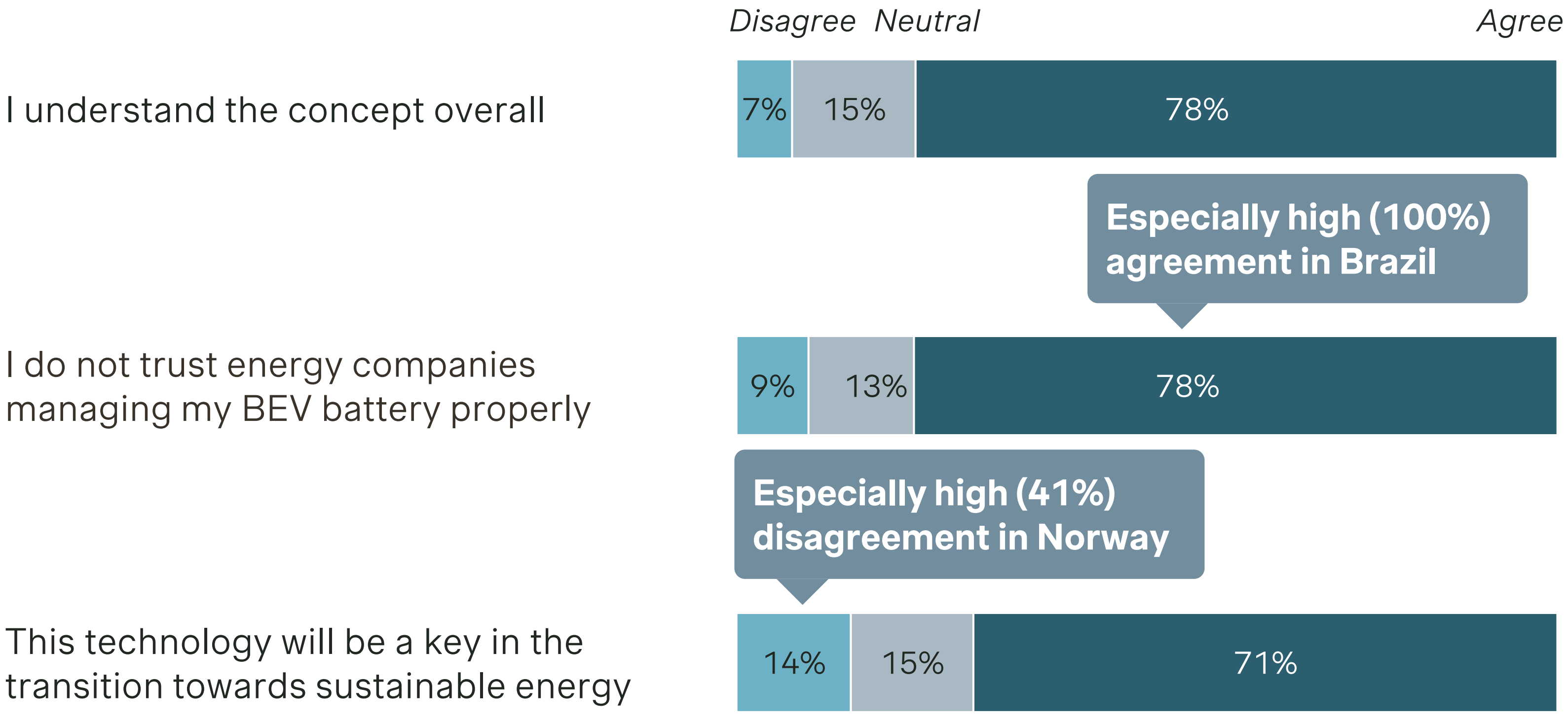


Source: Simon-Kucher Global Automotive Study, June 2025; n = 433 (overall sample size per question might vary, e.g., due to preselected answers); Q: Would you be interested in owning an electric vehicle with a Range Extender (REX) to increase the vehicle's range by using a small auxiliary engine to recharge the battery on longer trips?; *Auxiliary power source integrated into an EV that generates electricity to charge the vehicle's battery

Consumers seem well educated about Vehicle-to-X technologies, but trust in energy providers remains a hurdle

iStock/Ralf-Hahn

Electric vehicle charging behavior regarding Vehicle-to-X technologies

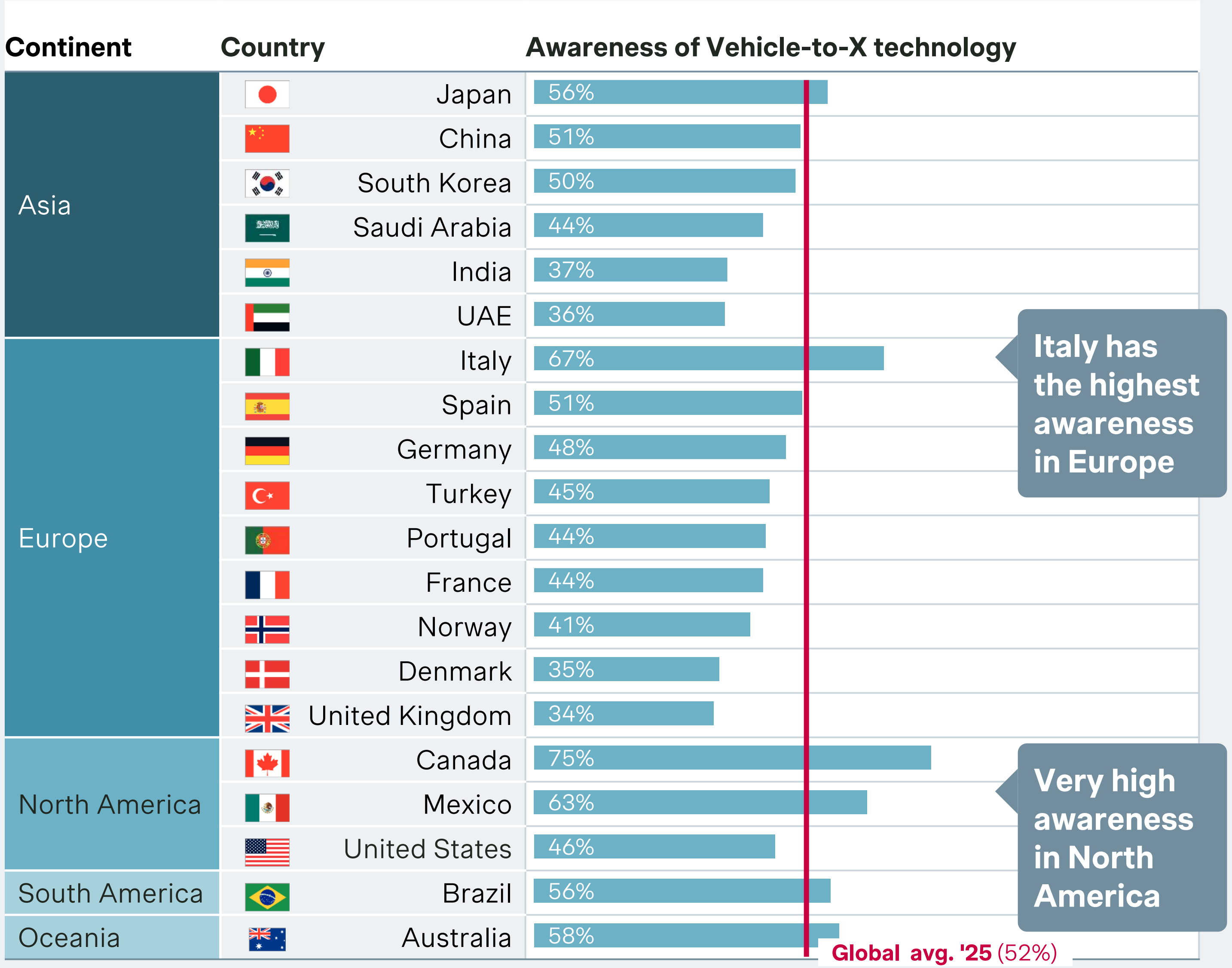


Especially high (100%) agreement in Brazil

Especially high (41%) disagreement in Norway

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: With regard to your electric vehicle charging behavior, how do you evaluate the following statements?

Vehicle-to-X awareness is especially high in North America

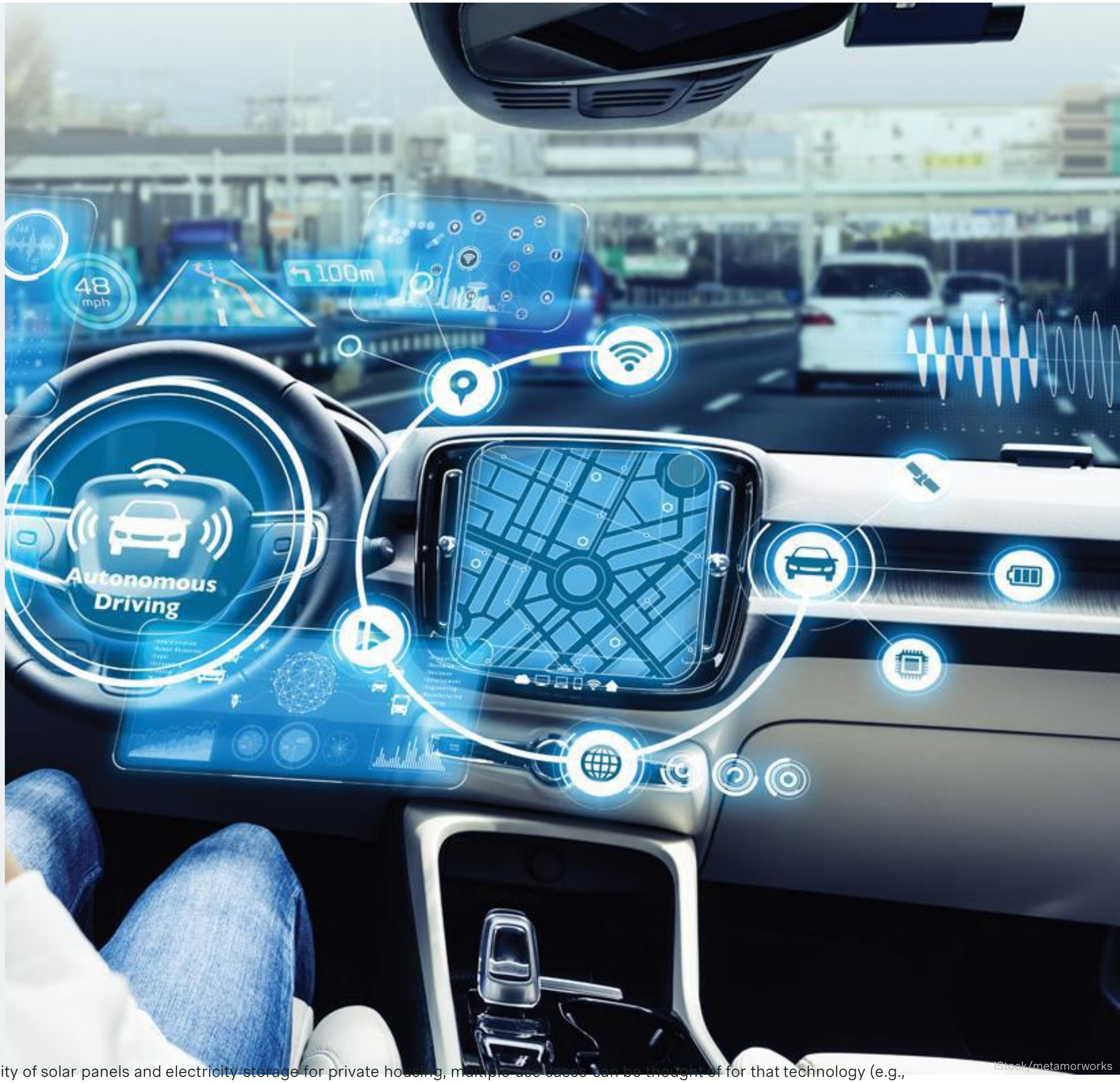


Continent	Country	Awareness of Vehicle-to-X technology
Asia	Japan	56%
	China	51%
	South Korea	50%
	Saudi Arabia	44%
	India	37%
	UAE	36%
Europe	Italy	67%
	Spain	51%
	Germany	48%
	Turkey	45%
	Portugal	44%
	France	44%
	Norway	41%
	Denmark	35%
	United Kingdom	34%
North America	Canada	75%
	Mexico	63%
	United States	46%
South America	Brazil	56%
Oceania	Australia	58%

Global avg. '25 (52%)

Italy has the highest awareness in Europe

Very high awareness in North America

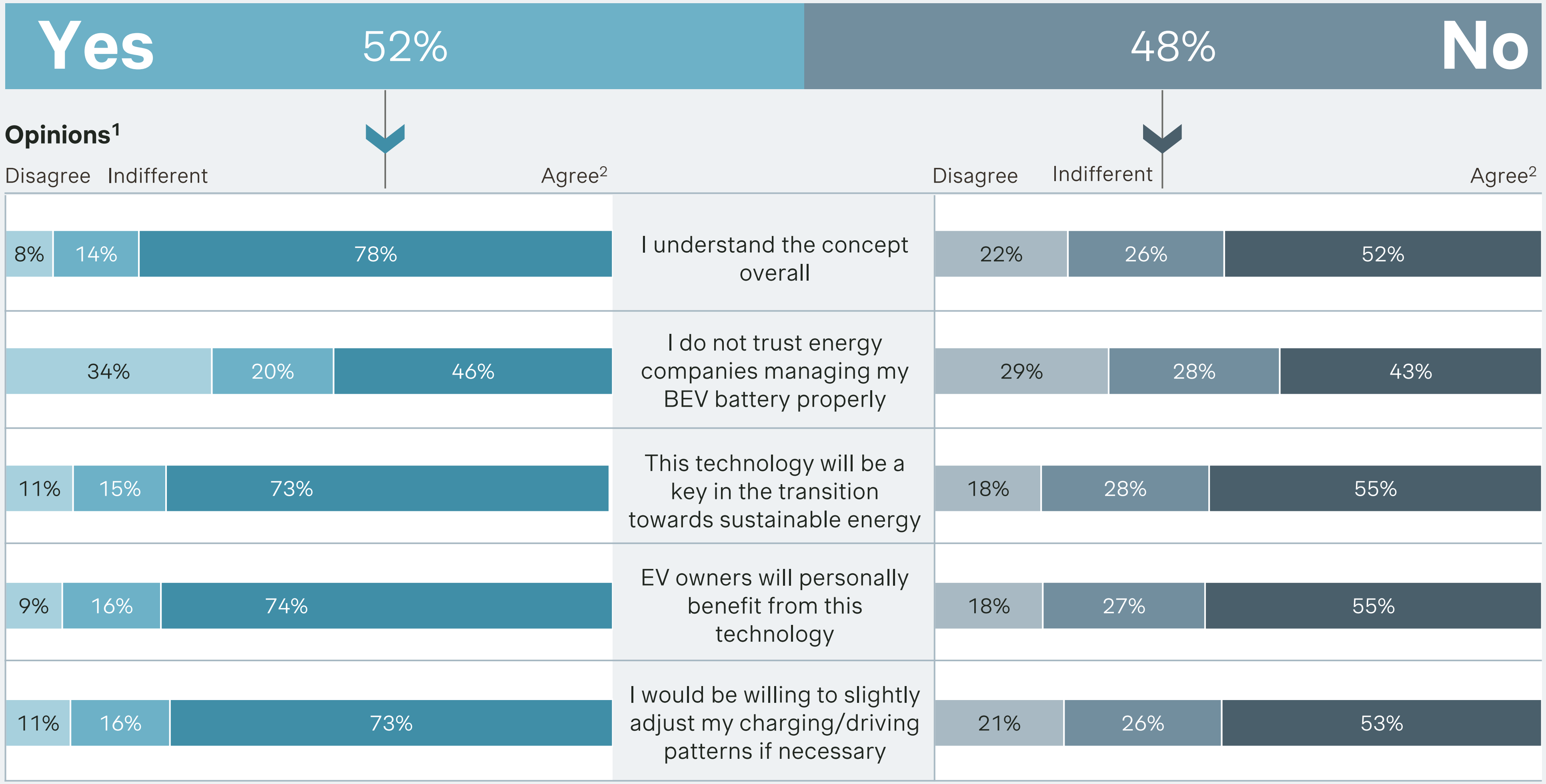


iStock/metamorworks

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Like the functionality of solar panels and electricity storage for private housing, multiple use cases can be thought of for that technology (e.g., overcompensation for energy provided back to the grid). Your vehicle battery would become part of the overall energy network when being plugged in. Meaning, energy providers could access your battery system (e.g., to buffer energy peaks or shortages in the electricity system) with limitations. With this in mind, how do you evaluate the following statements?

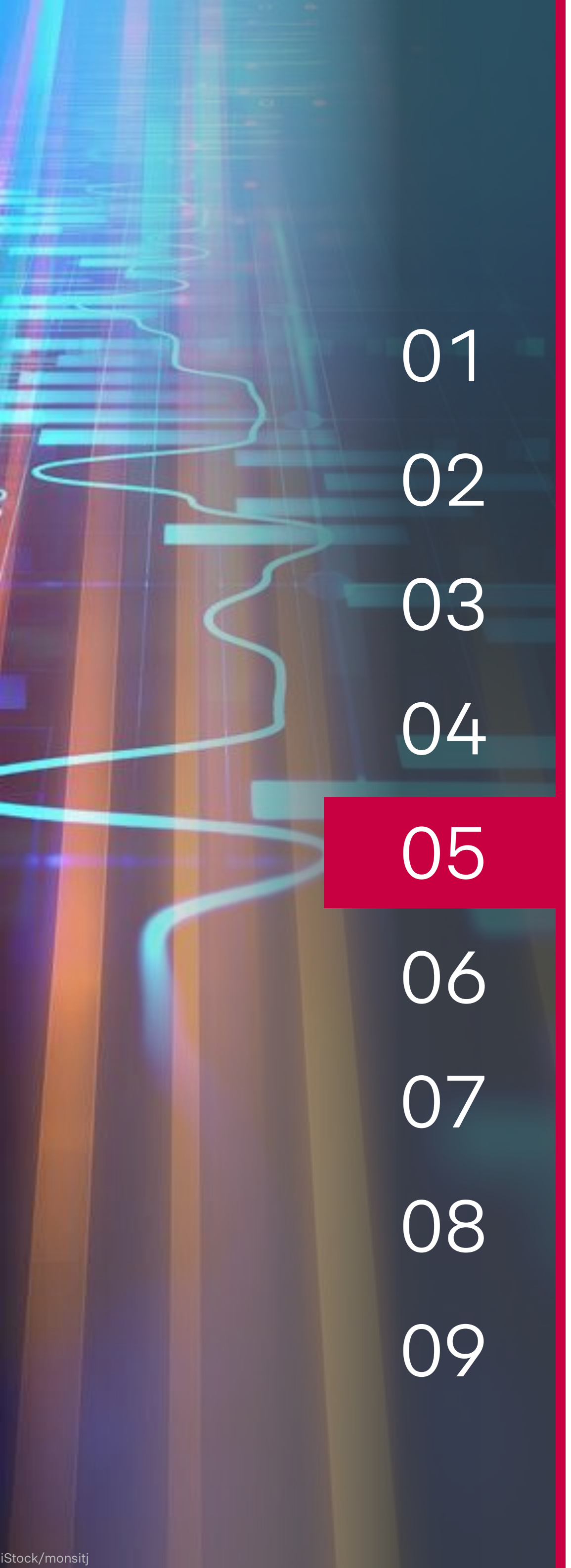
Public awareness and opinions on Vehicle-to-X technologies are moderate, but those who know are highly supportive and have a high degree of trust and willingness to adapt

Have you ever heard of: vehicle-to-grid, vehicle-to-load, or vehicle-to-X technology?




iStock/baona

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Like the functionality of solar panels and electricity storage for private housing, multiple use cases can be thought of for that technology (e.g., overcompensation for energy provided back to the grid). Your vehicle battery would become part of the overall energy network when being plugged in. Meaning, energy providers could access your battery system (e.g., to buffer energy peaks or shortages in the electricity system) with limitations. With this in mind, how do you evaluate the following statements?



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Agenda

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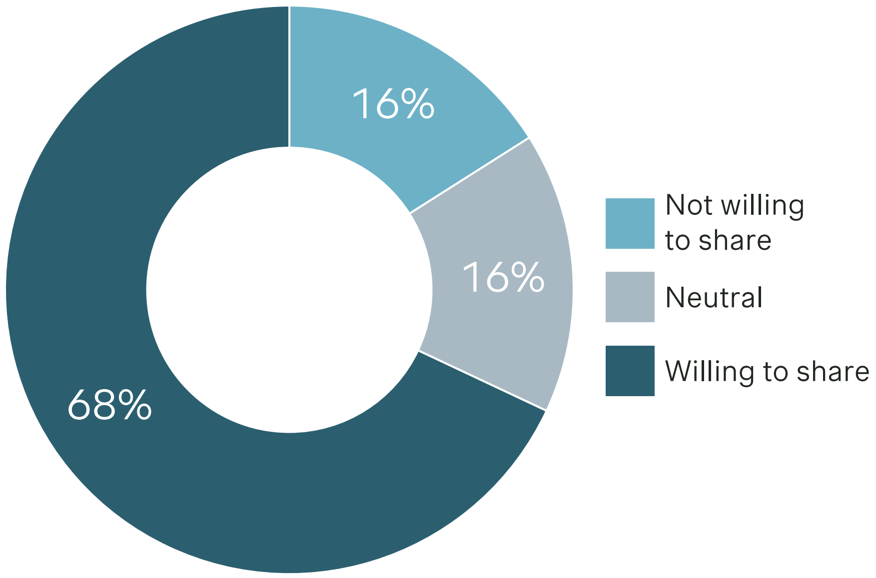
68% of customers are open to sharing connected vehicle data with the manufacturer, but only 58% are open to it when it comes to personal driving data

Respondents relatively open to sharing data about their vehicle overall…

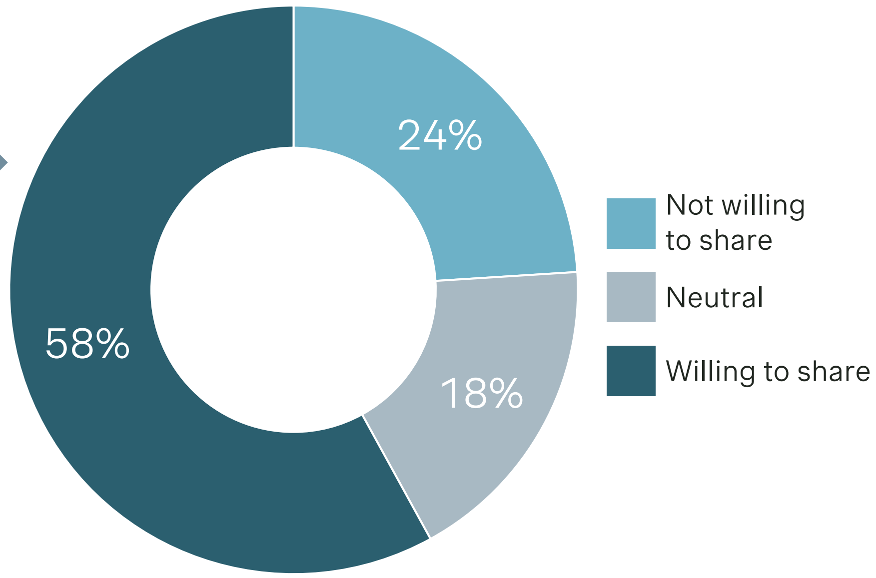
Willingness[1] to share vehicle data
(e.g., road hazards, weather, road conditions)



Willingness to share vehicle data in 2024
(e.g., road hazards, weather, road conditions)

… but significantly more hesitant about data related to individual behavior

Willingness[1] to share personal driving data
(e.g., current location, driven routes, acceleration patterns)



Slight increase to share personal data compared to last year

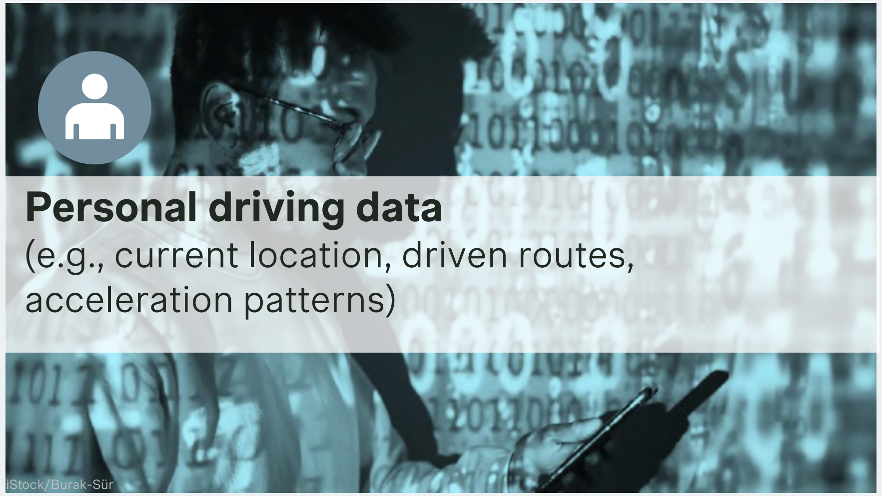
Willingness to share personal driving data in 2024
(e.g., current location, driven routes, acceleration patterns)

---

1) Willingness defined as 5, 6, or 7 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: New cars are increasingly connected and able to collect information (data) about how you drive, the condition of the car, and its surroundings. Technically, car manufacturers can store this information in an anonymized way, meaning, without knowing it is specifically yours. Please consider the different kinds of data shown below. Which data would you be willing to share with your car's manufacturer in return for monetary compensation or additional services? Remember, all data would be collected in an anonymized way and/or aggregated. Please rate from "1 = Not willing at all" to "7 = Extremely willing".

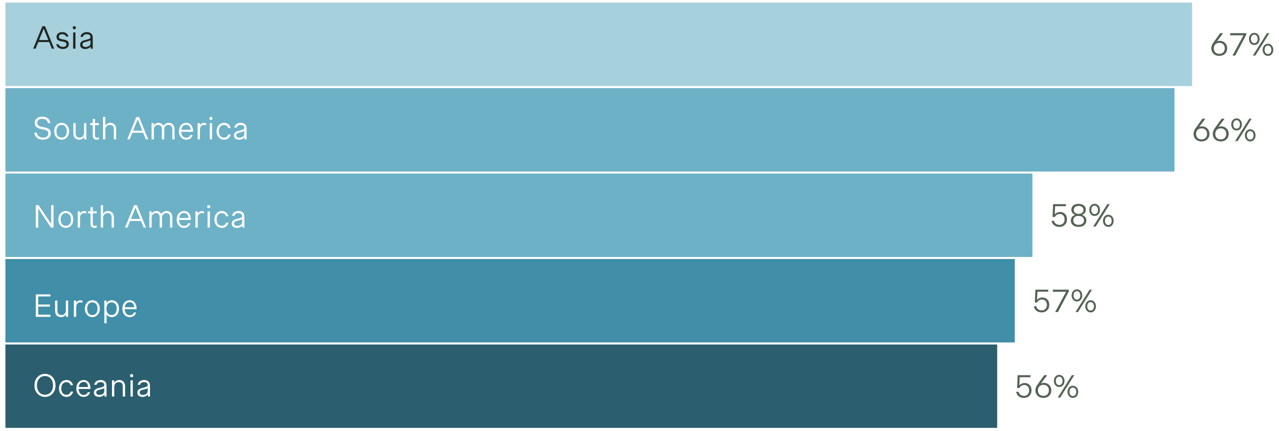
Asian customers show a relatively high willingness to share their personal driving data, which helps manufacturers gain valuable insights into customer behavior

Customers' willingness[1] to share the data by market



Personal driving data
(e.g., current location, driven routes, acceleration patterns)

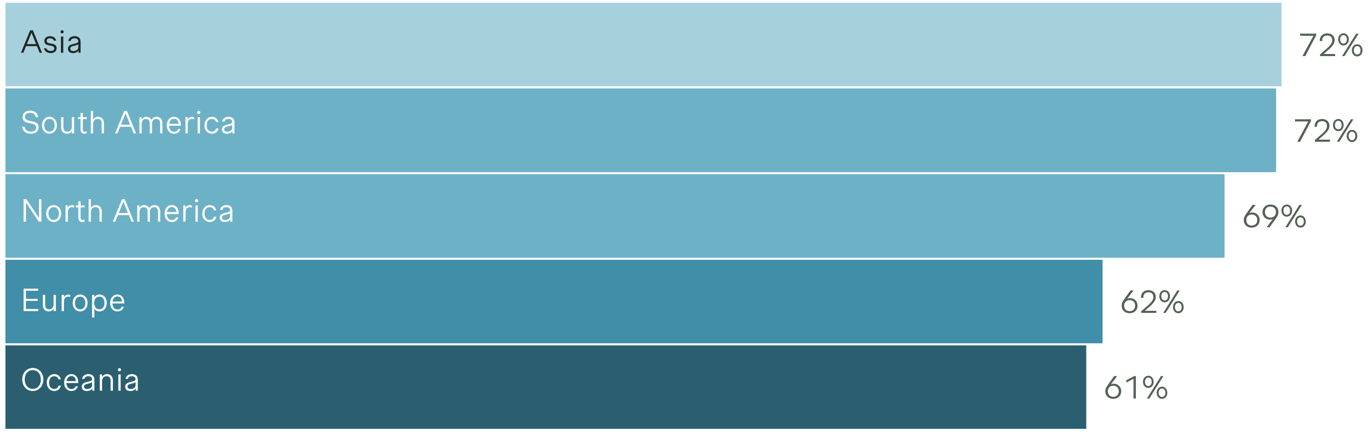
iStock/Burak-Sür



Asian customers show the **highest willingness** to **share** driving **data**, **regardless** of whether it is **personal** data or **vehicle** data

Vehicle data
(e.g., road hazards, weather, road conditions)

iStock/nadla



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[1] Willingness defined as 5, 6, or 7 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: New cars are increasingly connected and able to collect information (data) about how you drive, the condition of the car, and its surroundings. Technically, car manufacturers can store this information in an anonymized way, meaning, without knowing it is specifically yours. Which data would you be willing to share with your car's manufacturer?

Asian customers are more receptive to in-car advertisements compared to Western customers, though overall openness to such ads has increased globally

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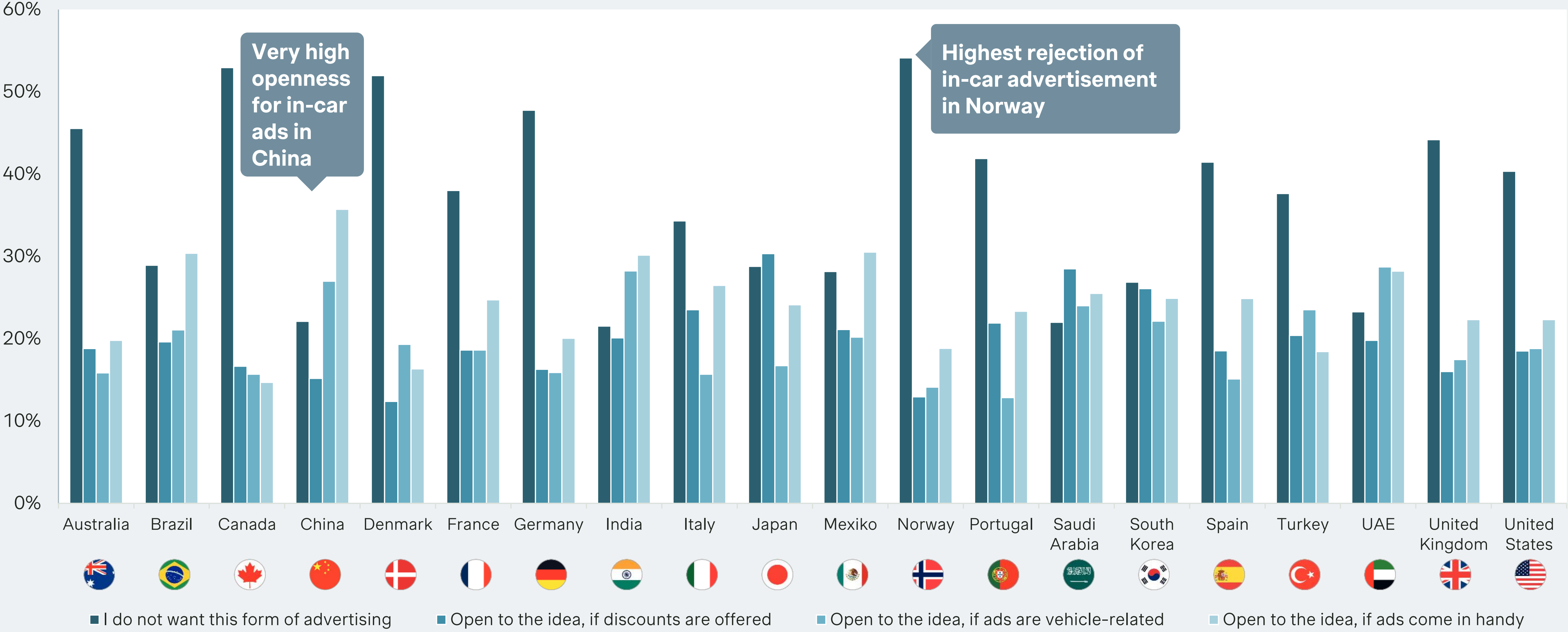
Agreement[1] with in-car advertisement by country

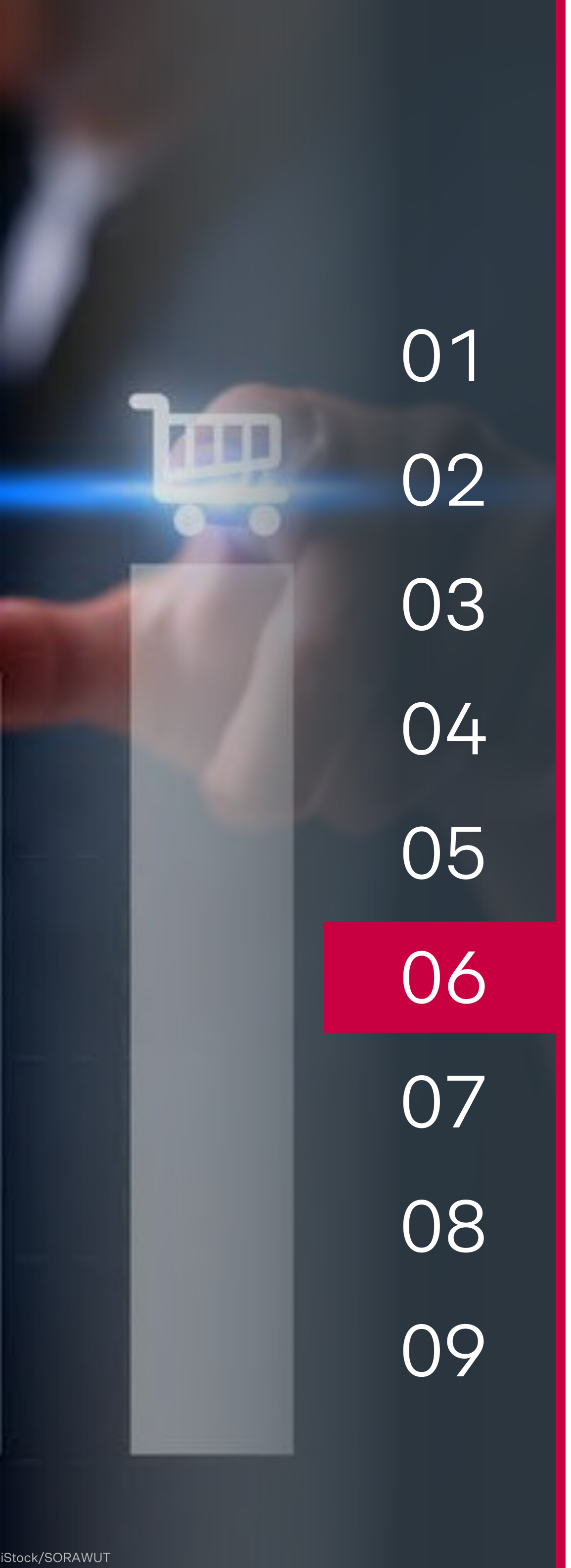


Very high openness for in-car ads in China

Highest rejection of in-car advertisement in Norway

---

[1] Agreement defined as 5, 6 or 7 on a 1-7 scale; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: With the increasing digitalization of cars, in-car advertising has become an important topic. This form of advertising would allow advertisers to play a targeted ad on your car's media screen. Which of the following statements do you relate to most regarding in-car advertising?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Car buyers expect AI to unlock key improvements in the automotive buying journey, especially for predictive maintenance and customer service processes

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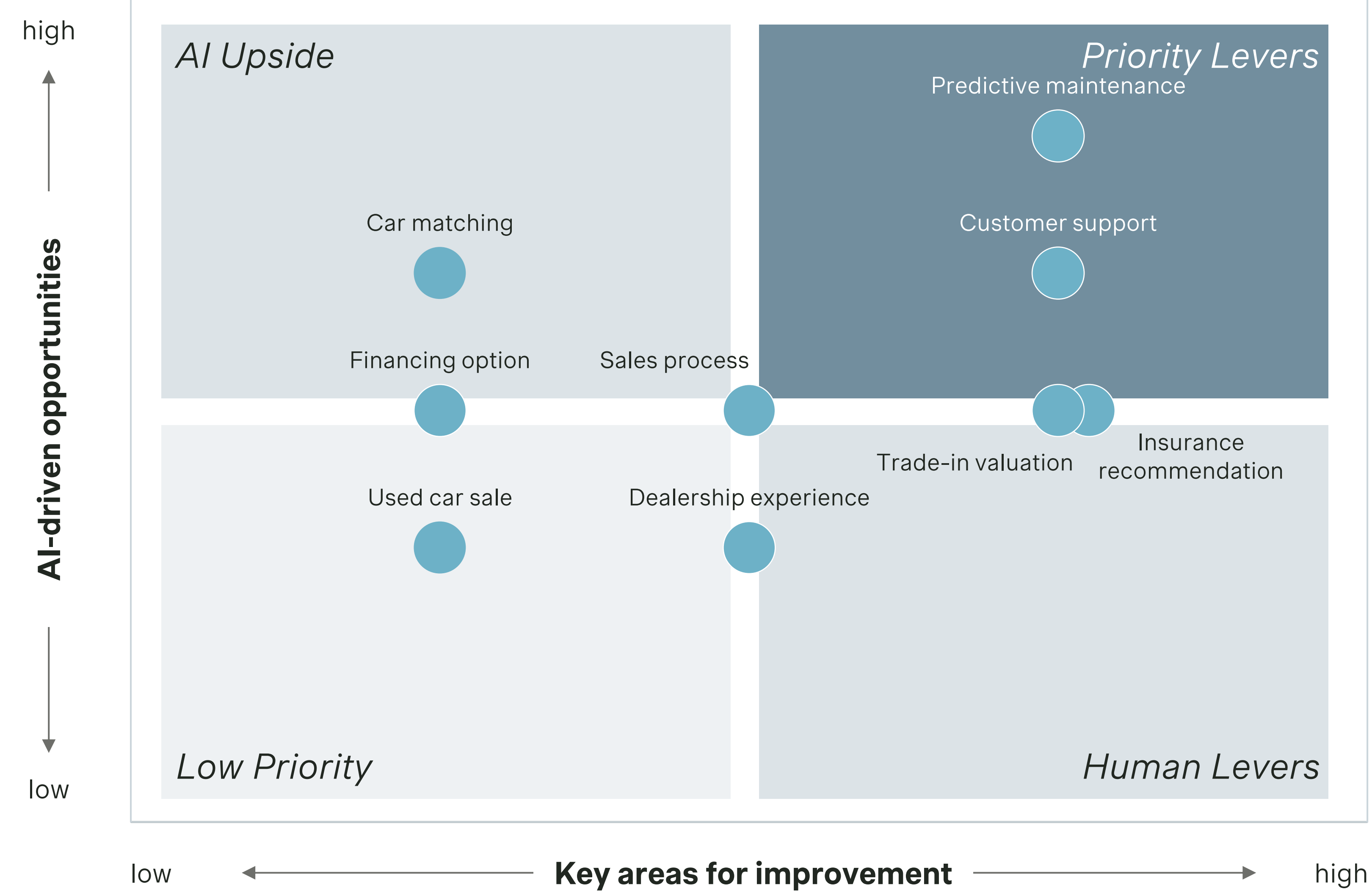
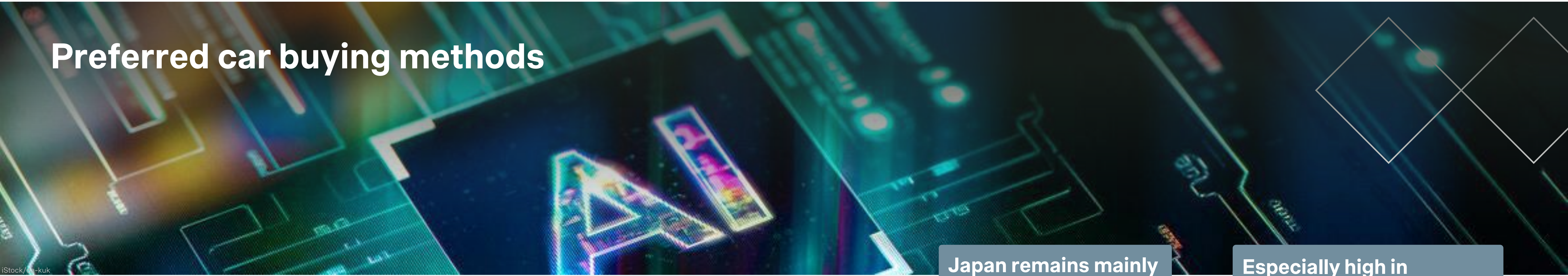
76% of consumer are excited to see what the future has to offer: AI must tackle those expectations

AI's potential for the general automotive buying experience



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: In which areas do you think the automotive buying experience could improve the most? (especially comparing it with other purchase experiences from these areas in your life, e.g., financing, service, aftersales) (1= No improvement needed, 4=Neutral, 7=Strong improvement needed). Q: In which areas do you think AI can improve the automotive buying experience the most? (e.g., financing, service, aftersales, end-of-lifecycle resale) (1=No improvement with AI, 4=neutral, 7=Strong improvement with AI).

Car buyers still want the human touch: Dealerships still dominate (82% top rating) while configurators (63%) outpace AI advisors (54%)



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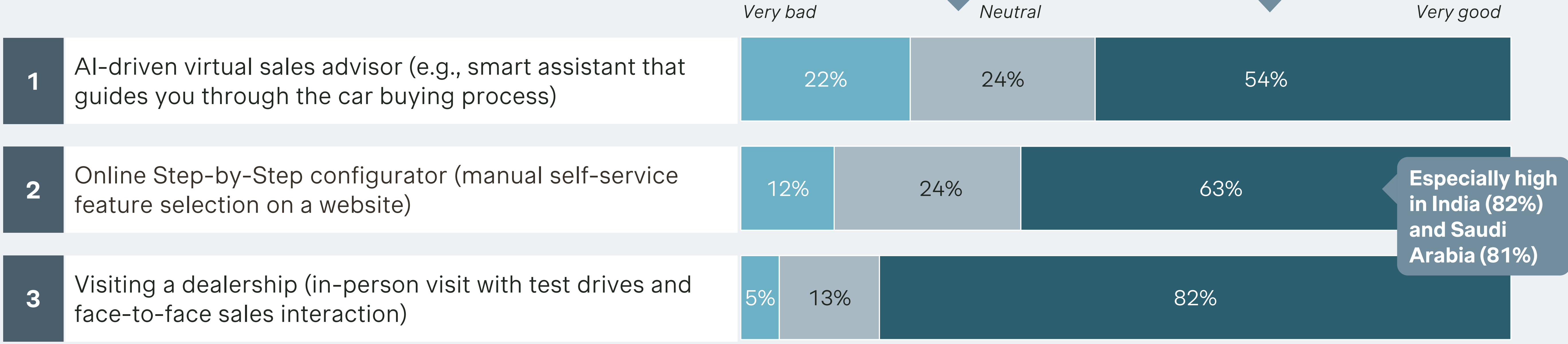
Preferred car buying methods



Japan remains mainly neutral (36%)

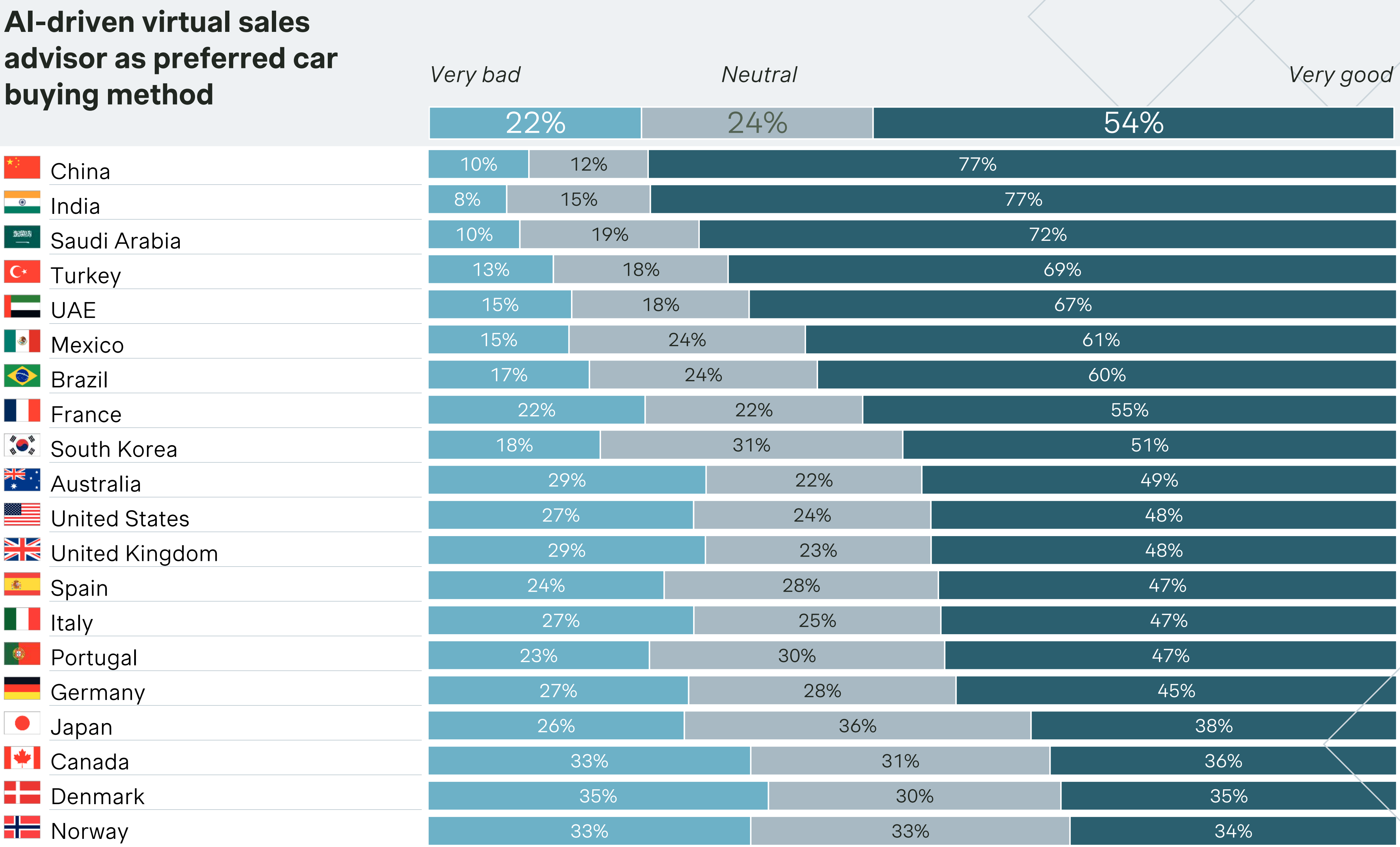
Especially high in China (77%) & India (77%)

Especially high in India (82%) and Saudi Arabia (81%)

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: People today can choose different ways to buy a car. Based on your experience or expectations, how would you rate the following car buying methods in terms of the criteria below? (1 = Very bad, 4= Neutral 7 = Very good)

Especially Northern European countries view AI-driven virtual sales advisors with skepticism

Stock/da-kuk



AI-driven virtual sales advisor as preferred car buying method

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: People today can choose different ways to buy a car. Based on your experience or expectations, how would you rate the following car buying methods in terms of the criteria below? (1 = Very bad, 4= Neutral 7 = Very good) -> Selection of AI answers only

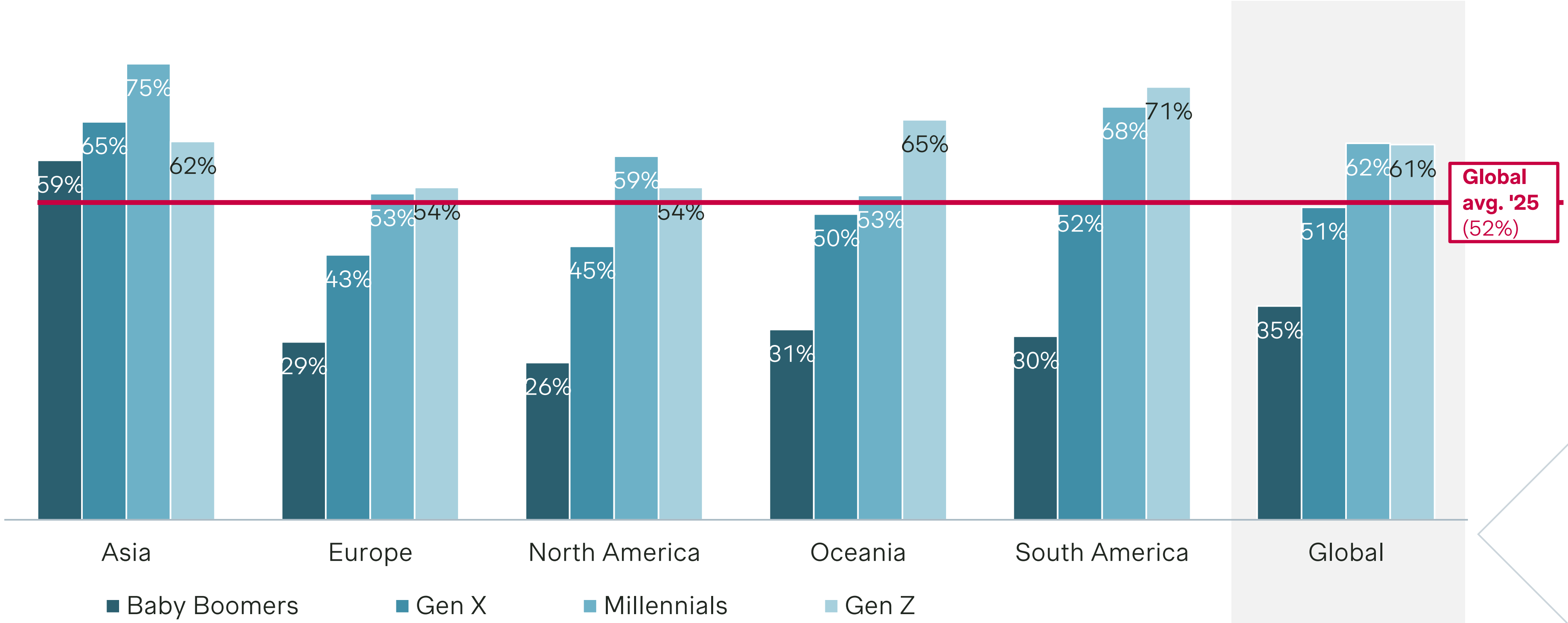
Especially Millennials in Asia prefer AI-driven virtual sales advisors as preferred car buying method

Stock/da-kuk

AI-driven virtual sales advisor as preferred car buying method

Generational split

Very good



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AI-enabled next-best-actions close online-offline gaps across the automotive customer journey, but the handover part is still a crucial offline step in the process

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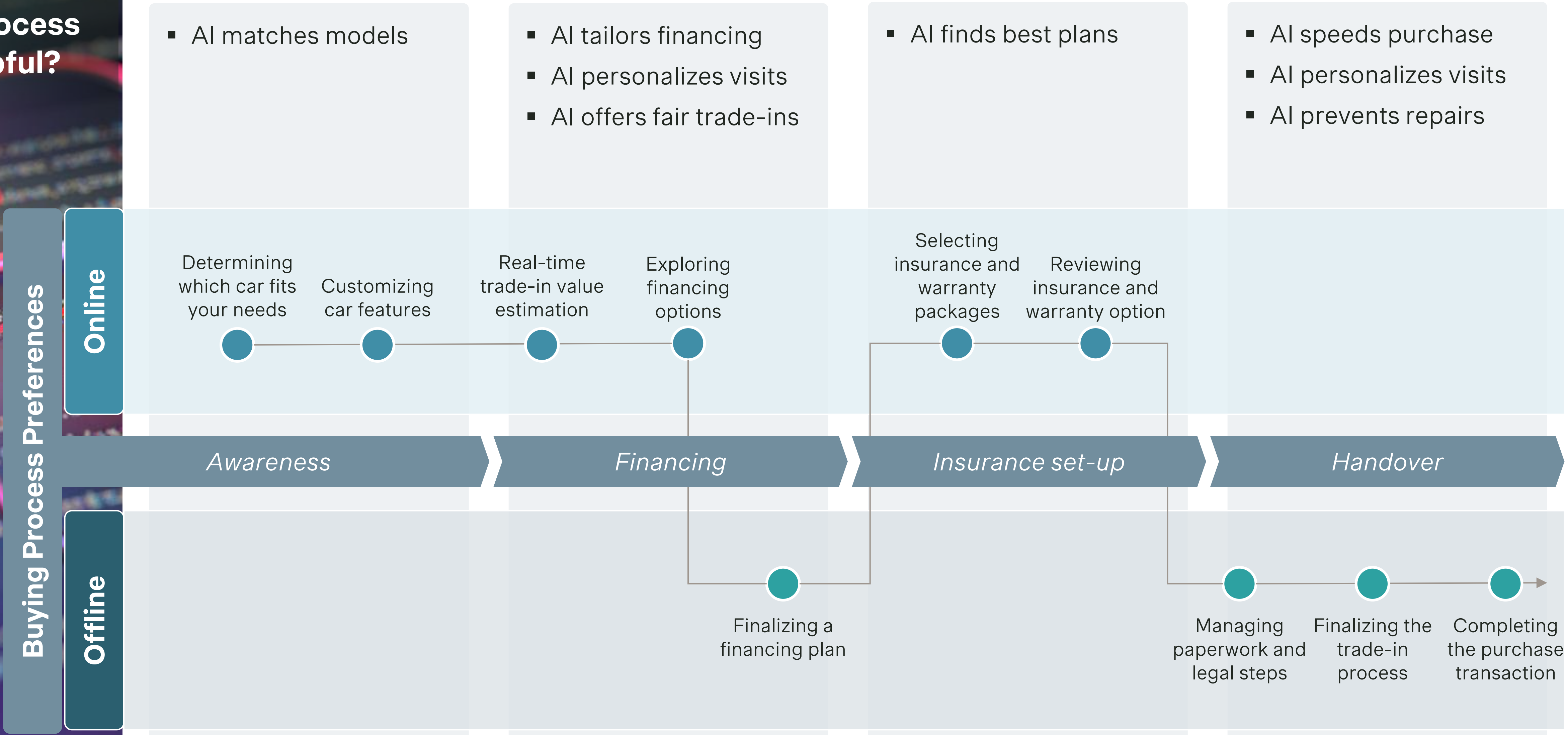
In which areas of the buying process can AI be helpful?



Awareness
- AI matches models

Online: Determining which car fits your needs; Customizing car features

Financing
- AI tailors financing
- AI personalizes visits
- AI offers fair trade-ins

Online: Real-time trade-in value estimation; Exploring financing options

Offline: Finalizing a financing plan

Insurance set-up
- AI finds best plans

Online: Selecting insurance and warranty packages; Reviewing insurance and warranty option

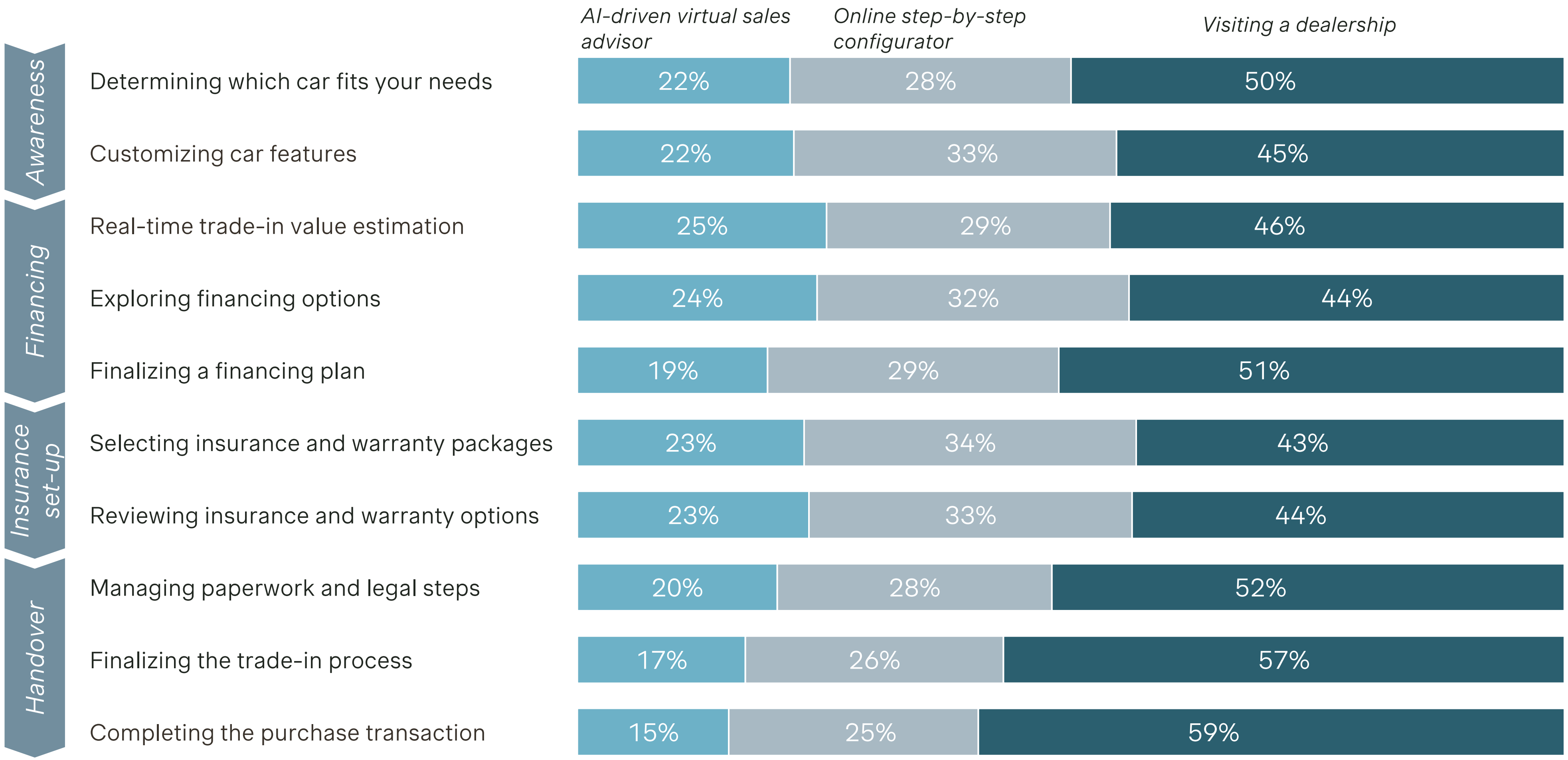
Handover
- AI speeds purchase
- AI personalizes visits
- AI prevents repairs

Offline: Managing paperwork and legal steps; Finalizing the trade-in process; Completing the purchase transaction

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Car Buying Preferences: Choose your Preferred Approach for each step As the car-buying experience continues to evolve, various methods are now available to help you through different parts of the process. Please indicate your preferred approach for each of the following aspects of buying a car. Select one option per row that best matches how you would ideally handle that specific task.; Online is defined as >= 50% of AI-driven Virtual Sales Advisor and Online Step-by-Step Configurator; Offline defined as > 50% of Visiting a Dealership

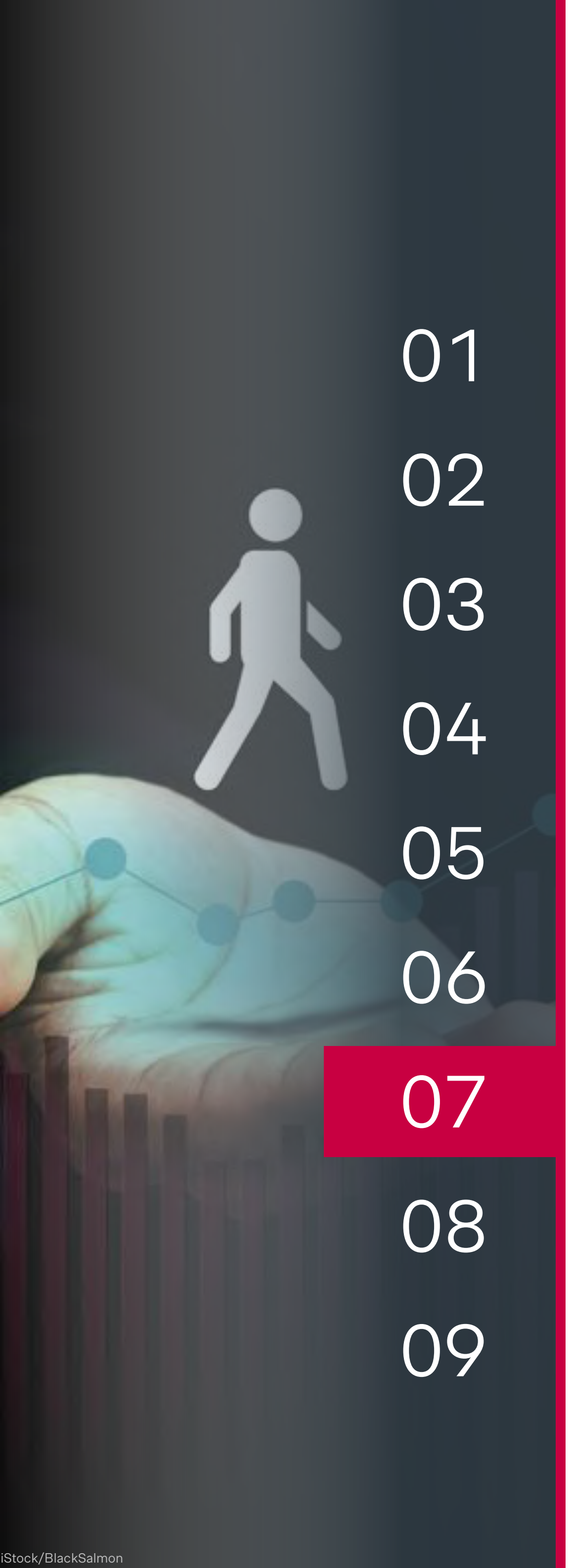
AI is a preferred option for valuation and finance prep, yet dealerships remain essential to close the deal

Stock/da-kuk



Best option to handle buying process tasks

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Car Buying Preferences: Choose your Preferred Approach for each step As the car-buying experience continues to evolve, various methods are now available to help you through different parts of the process. Please indicate your preferred approach for each of the following aspects of buying a car. Select one option per row that best matches how you would ideally handle that specific task.



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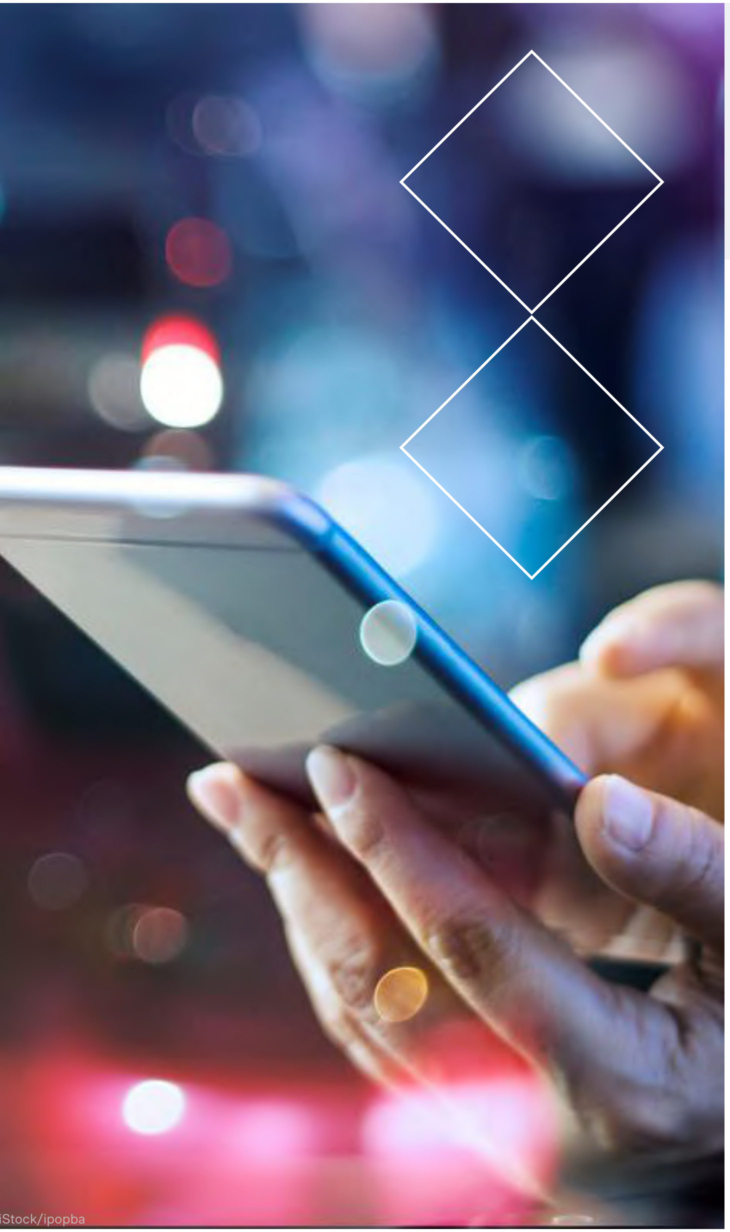
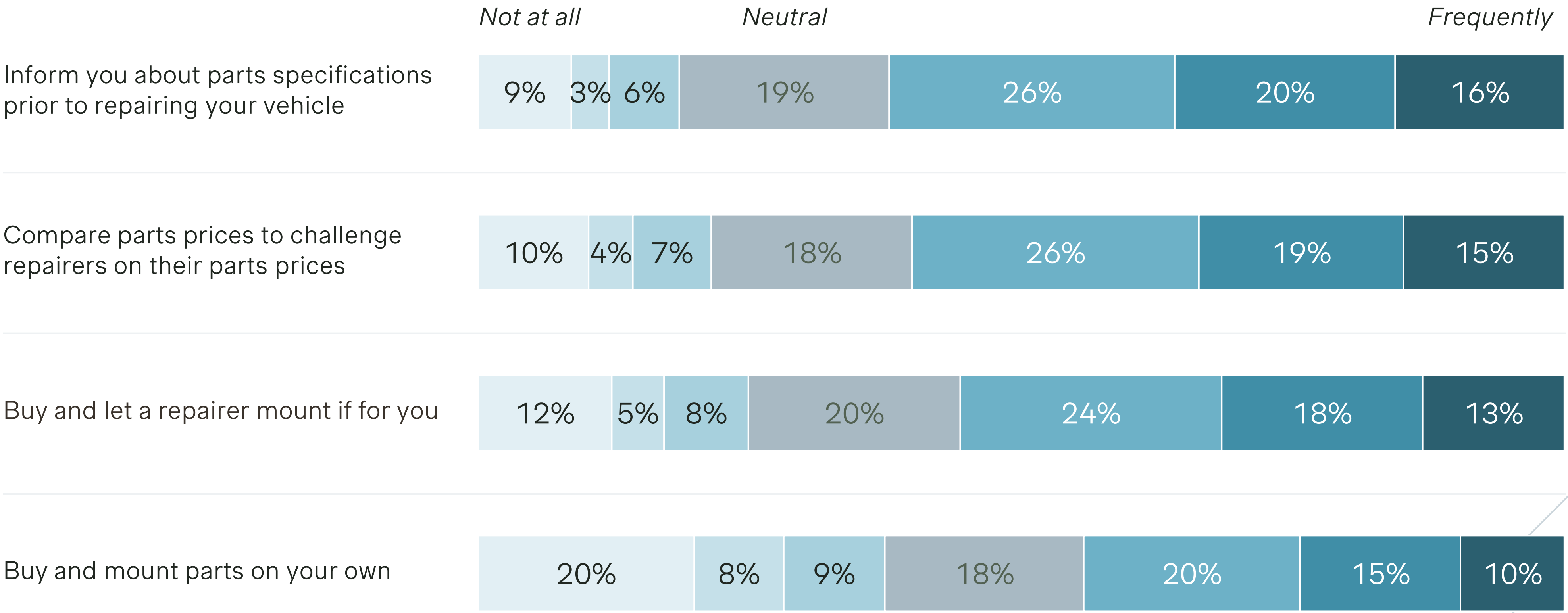
Digital channels put customers in the driver's seat for parts and repairs



Key consumer use cases for online vehicle parts platforms

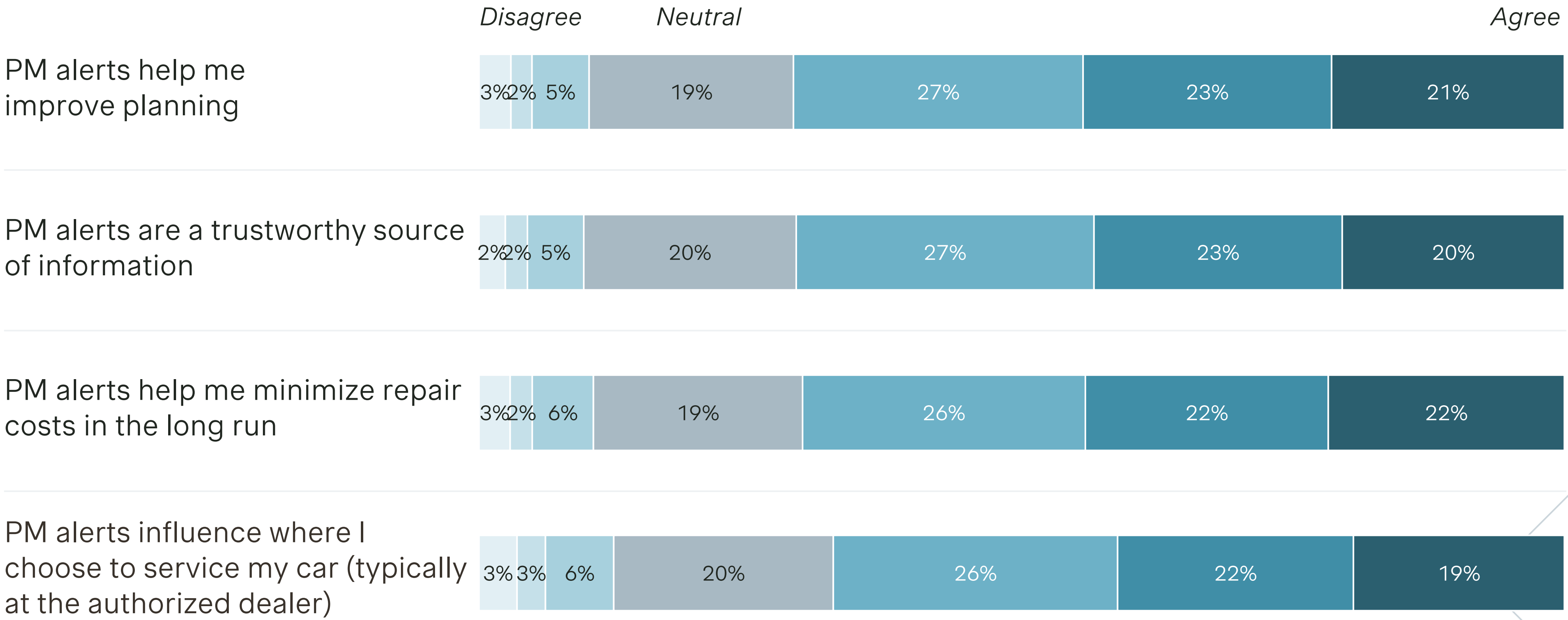


Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Online platforms to buy vehicle parts have rapidly developed in recent years, making it easier to browse, compare, and purchase vehicle parts online. To what extent do you use these platforms for the following purposes? Rate each item from 1 = Not at all to 7 = Very frequently.

Predictive-maintenance alerts deliver trusted value for 7-in-10 drivers

iStock/EvgeniyShkolenko

Expectations and preferences for predictive maintenance (PM) alerts

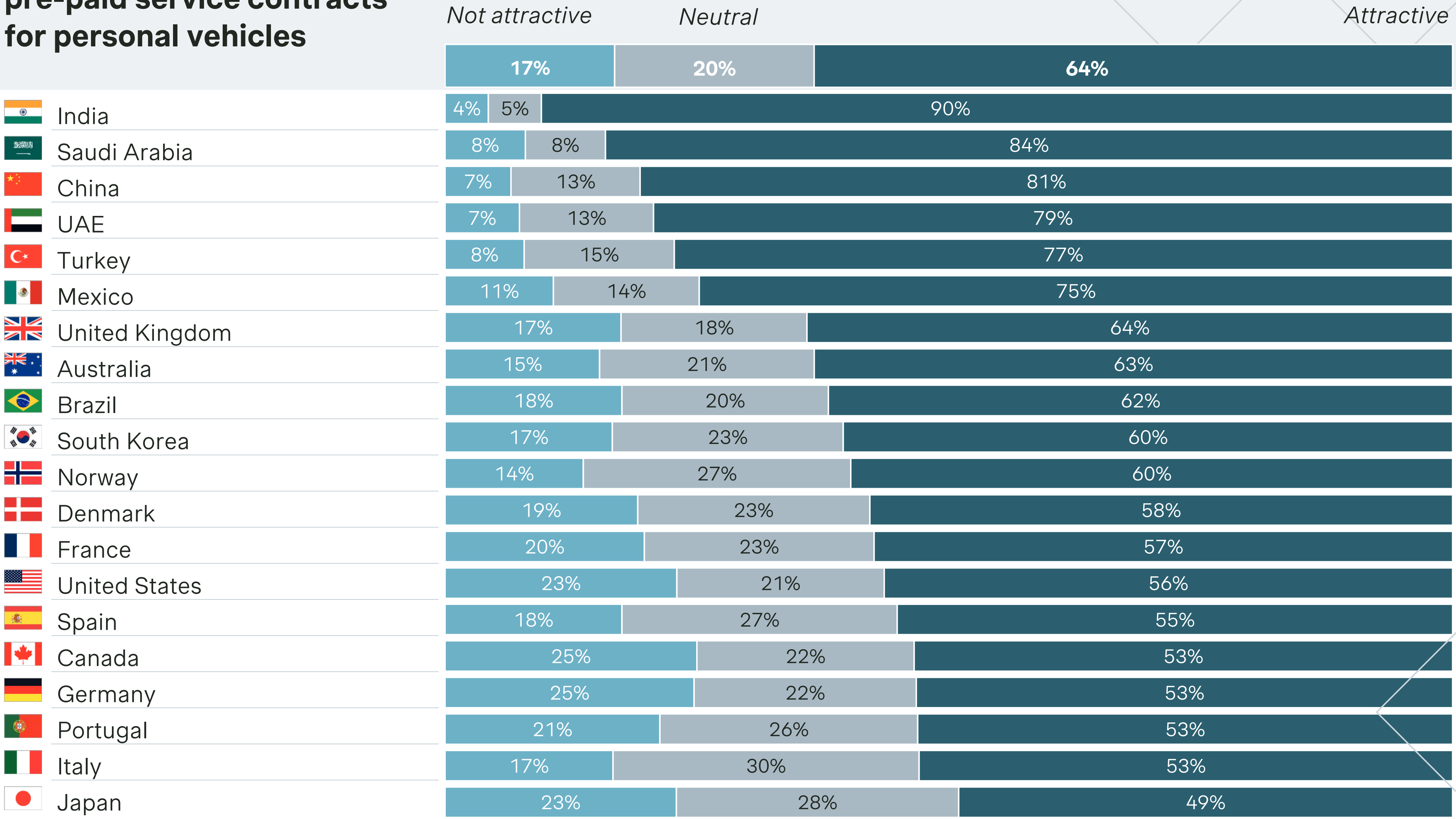


Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Predictive maintenance (PM) provides alerts about potential vehicle issues before they become serious. These alerts can guide your service decisions. How useful do you find predictive maintenance (PM) alerts? Rate from "1 = Not useful at all" to "7 = Extremely useful."

Two-thirds of customers view long-term pre-paid service contracts as attractive

iStock/Drazen-Zigic

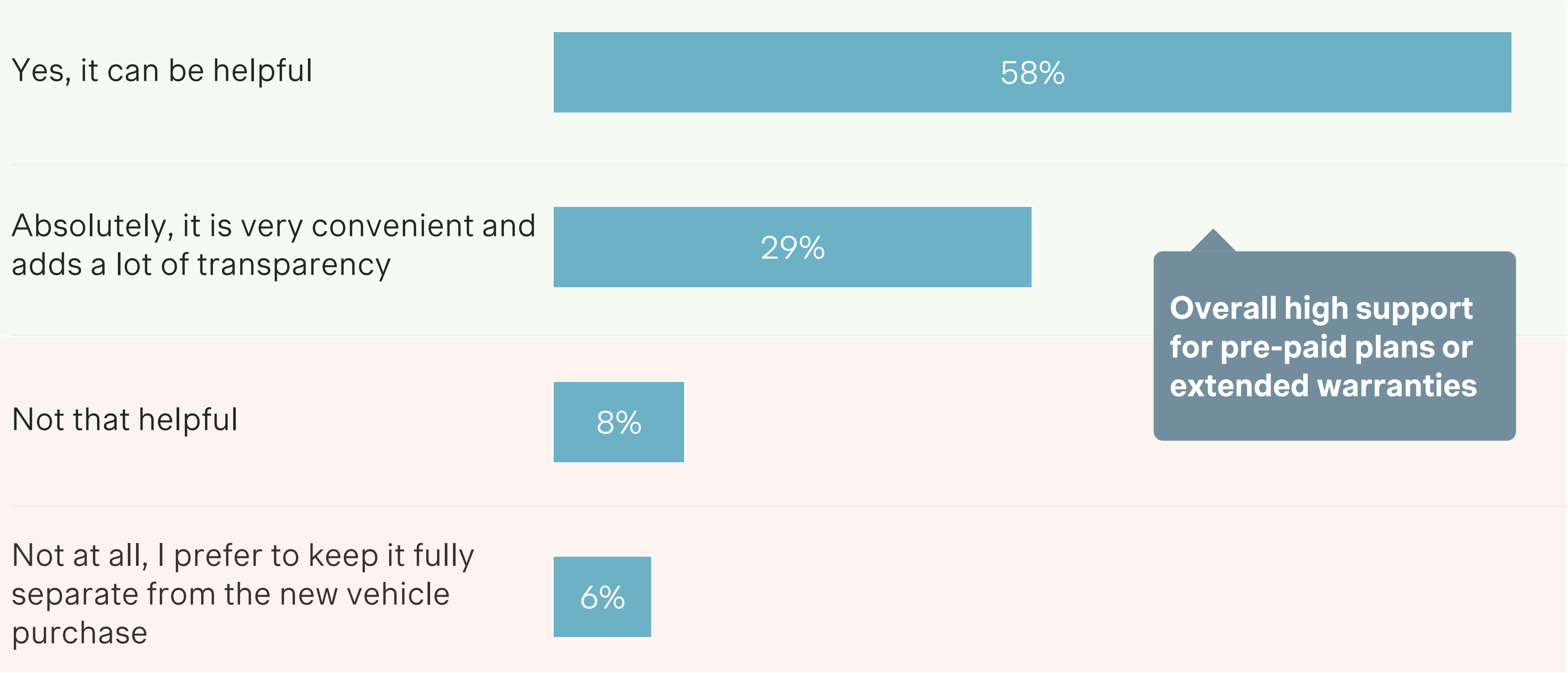
Attractiveness of long-term pre-paid service contracts for personal vehicles



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: How attractive are long-term pre-paid service contracts for your vehicle? Rate from "1 = Not attractive at all" to "7 = Very attractive"

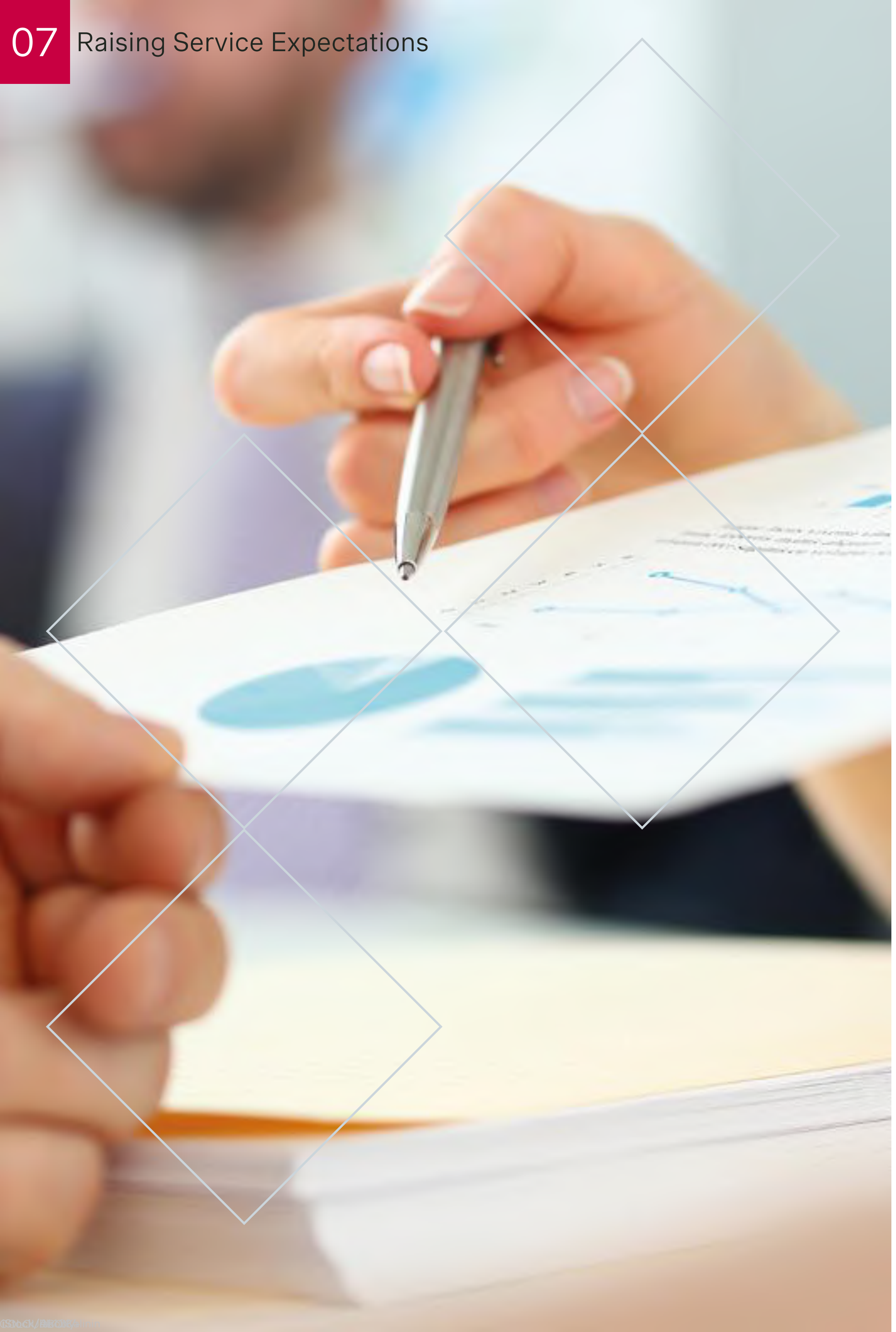
Majority welcome bundling pre-paid plans into the vehicle sale

Favor of integrated pre-paid maintenance plans or extended warranties



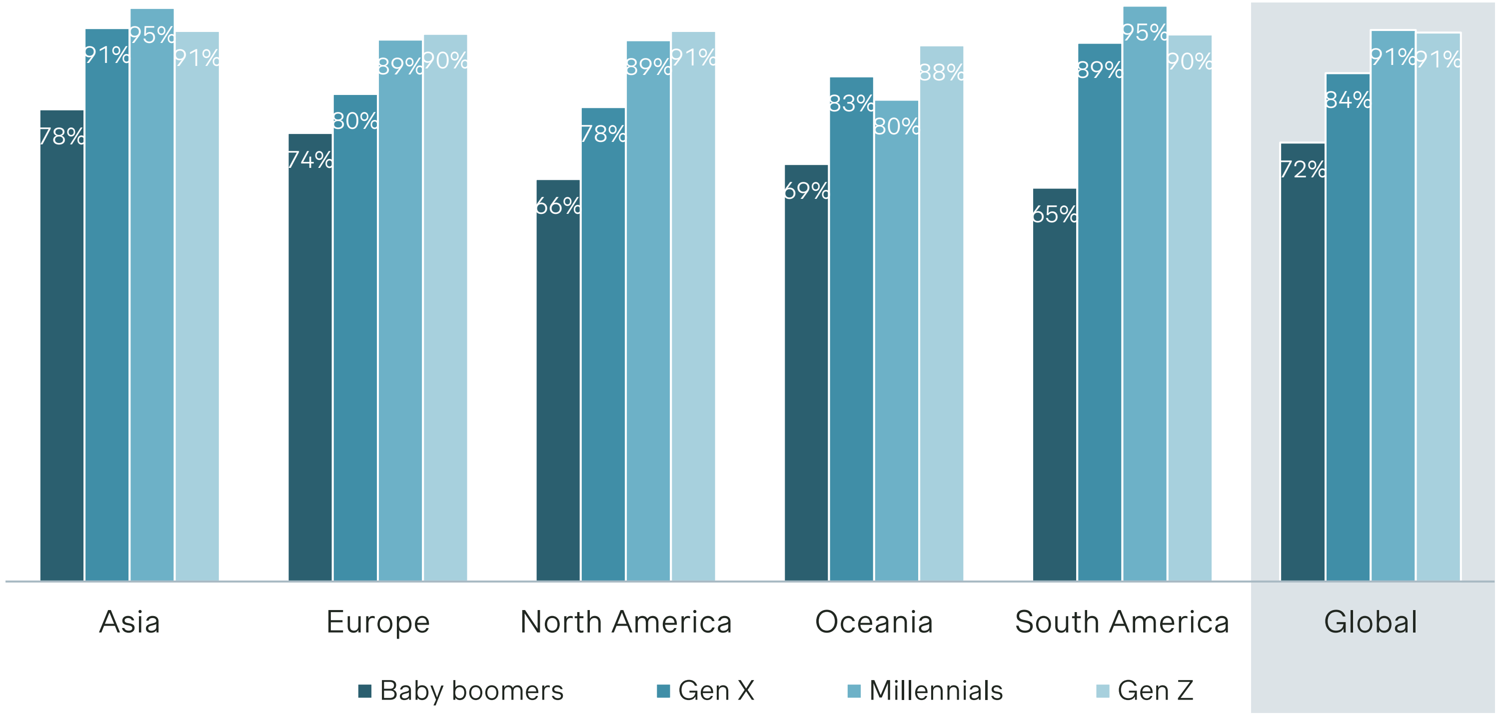
Overall high support for pre-paid plans or extended warranties

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Car configurators of selected manufacturers are starting to integrate pre-paid maintenance plans or extended warranties alongside equipment levels and individual options. Do you favor this evolution?



Especially Millennials and Gen Z are extremely favorable of pre-paid maintenance plans or extended warranties

Consideration[1] of integrated pre-paid maintenance plans or extended warranties by market and generation[2]



Baby boomers have a low acceptance of pre-paid plans

1) Consideration defined as 1, 2, on a 1-4 scale; 2) Gen Z = 18-28 years, Millennials = 29-44 years, Gen X = 45-60 years, Baby Boomers = 61+ years; Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: Car configurators of selected manufacturers are starting to integrate pre-paid maintenance plans or extended warranties alongside equipment levels and individual options. Do you favor this evolution?

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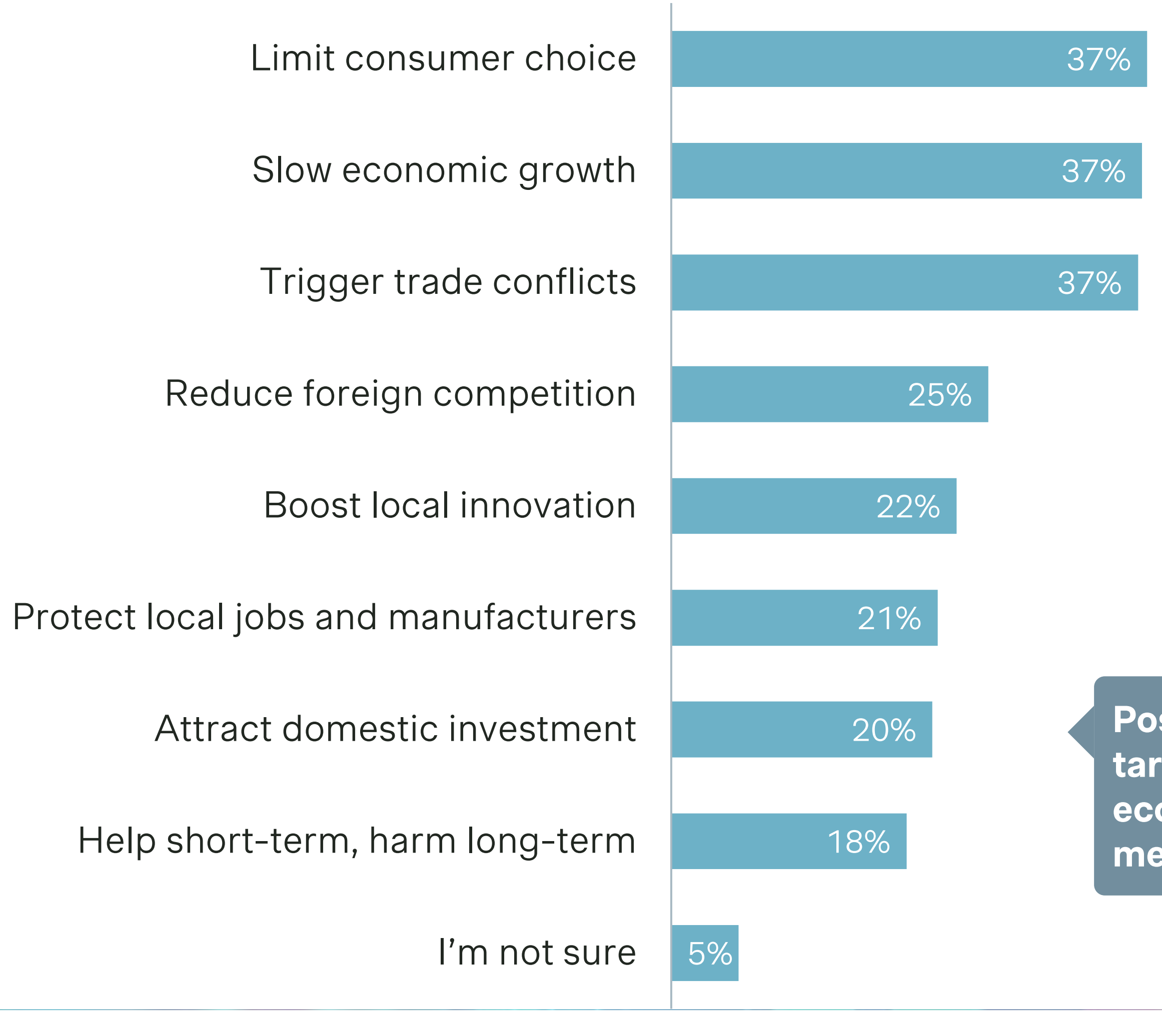
Impact of tariffs on economy, consumers, and OEMs: Tariffs are perceived as costly, slowing economic growth, and potentially driving market disruption

Impact of car tariffs on the economy and consumers (excluding price)



Tariffs are primarily perceived as negatively impacting the economy

Positive effects of tariffs for the local economy are barely mentioned

iStock/monsit

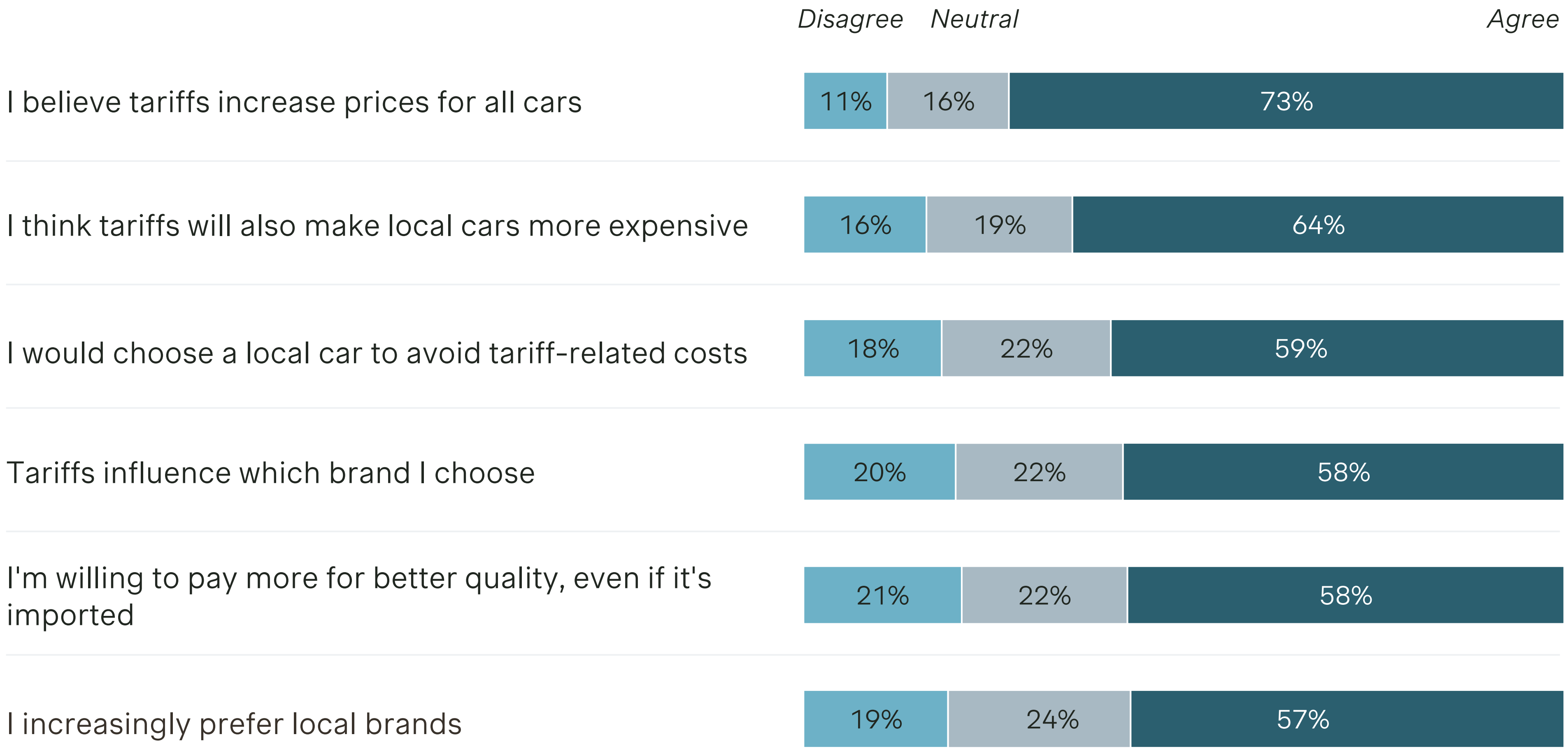
Tariffs can also impact OEMs:

- Tariffs introduce **long-term strategic uncertainty** for OEM brand portfolios
- Smaller or less diversified brands may face **outsized operational and financial pressure**
- Sector realignment could lead to a **reshaped competitive landscape** with fewer players

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: How do you think tariffs on cars impact the economy and consumers?; excluding Price topics

Customers are highly sensitive to tariff effects, especially regarding price and brand decisions

Effects of tariffs



Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: How much do you agree with the following statements around tariffs and their effects? Please rate from "1 = Strongly disagree" to "7 = Strongly agree"

Overall, very high belief in Turkey that tariffs will increase prices for all cars, with China being the least critical

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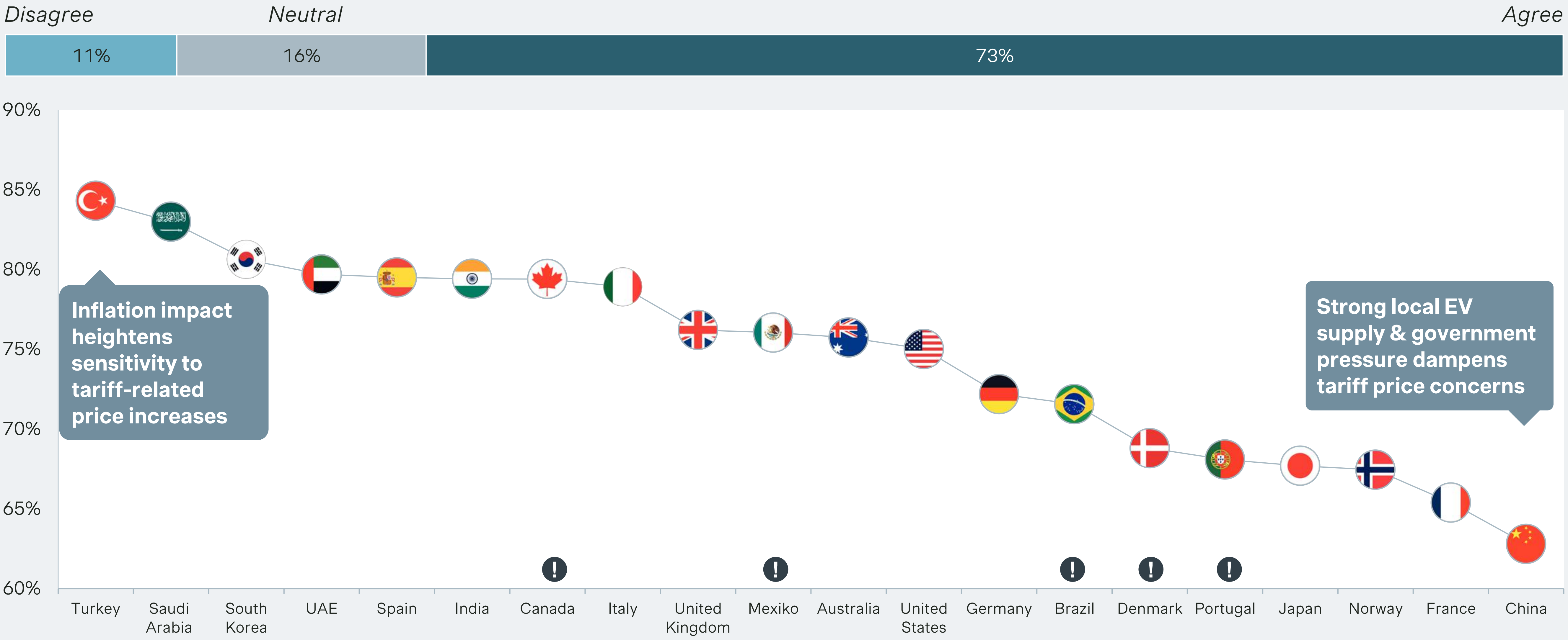
Respondents who believe tariffs increase prices for all cars

! New countries added this year



Inflation impact heightens sensitivity to tariff-related price increases

Strong local EV supply & government pressure dampens tariff price concerns

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q: How much do you agree with the following statements around tariffs and their effects? - I believe tariffs increase prices for all cars

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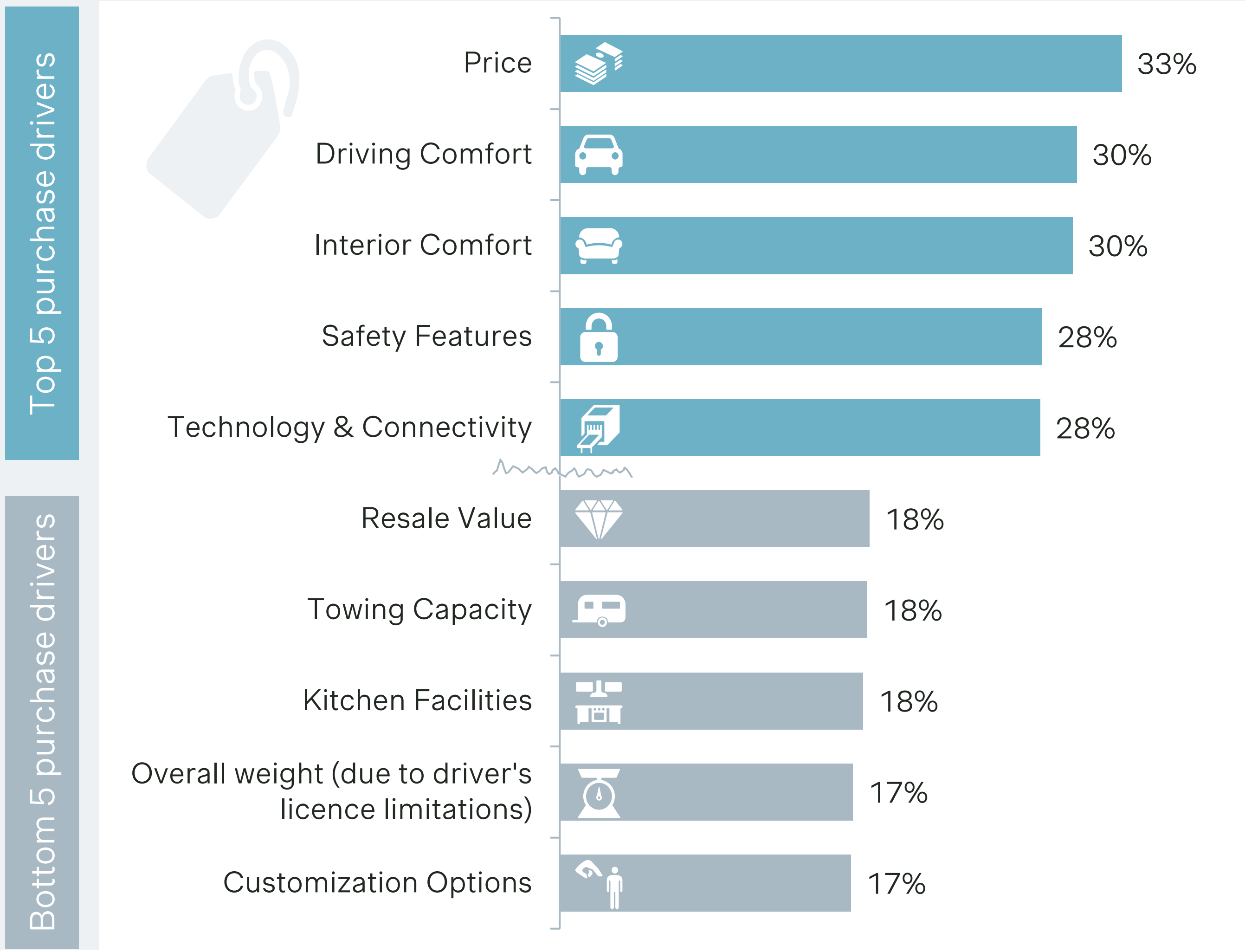
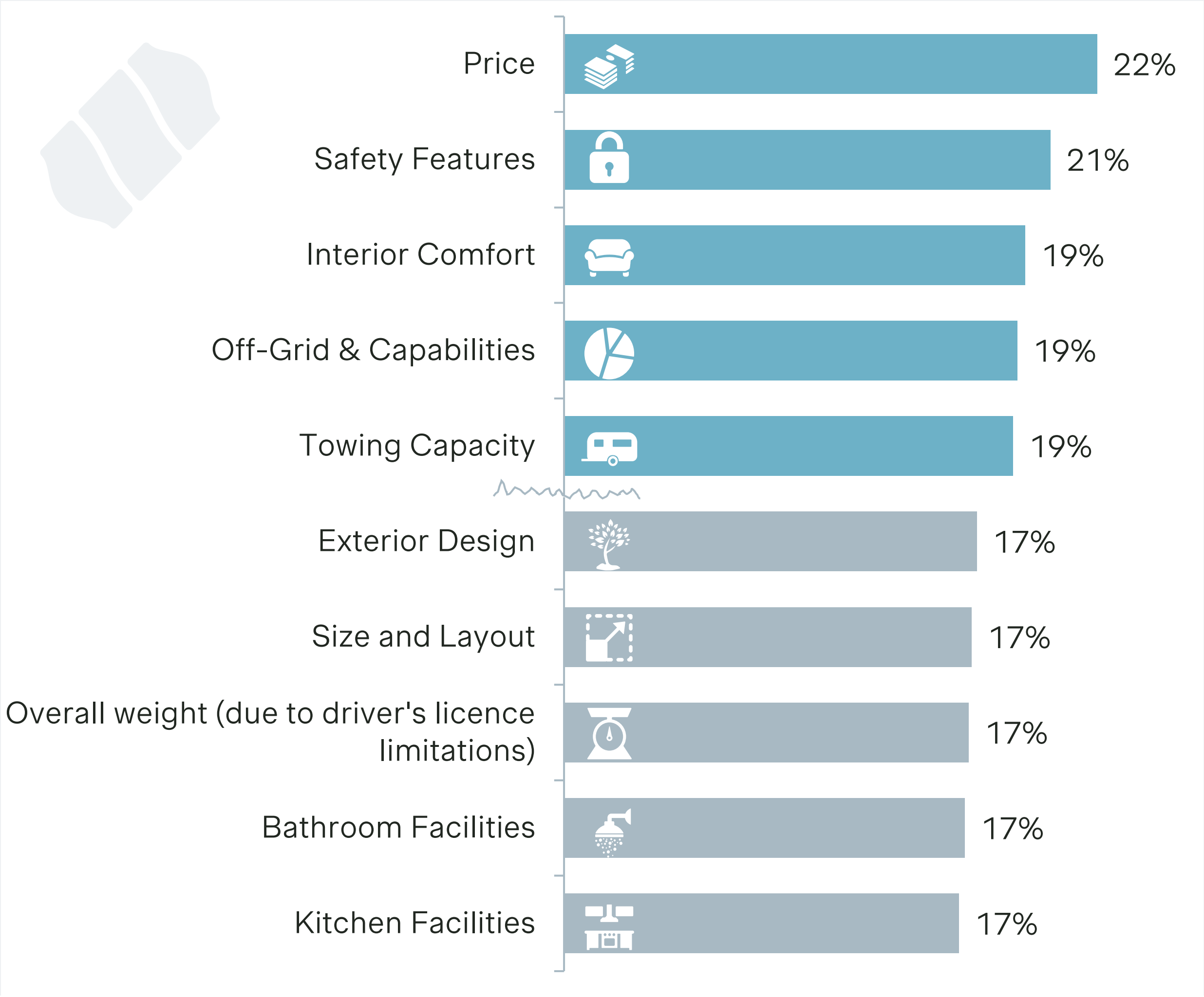
5. How should brands respond to China's rise, tariffs, and the used EV trust gaps?

Cost is the most important factor, but RV customers want a comfortable, well-designed living and driving experience

Most relevant purchase drivers when considering an RV
(Respondents who consider buying an RV)



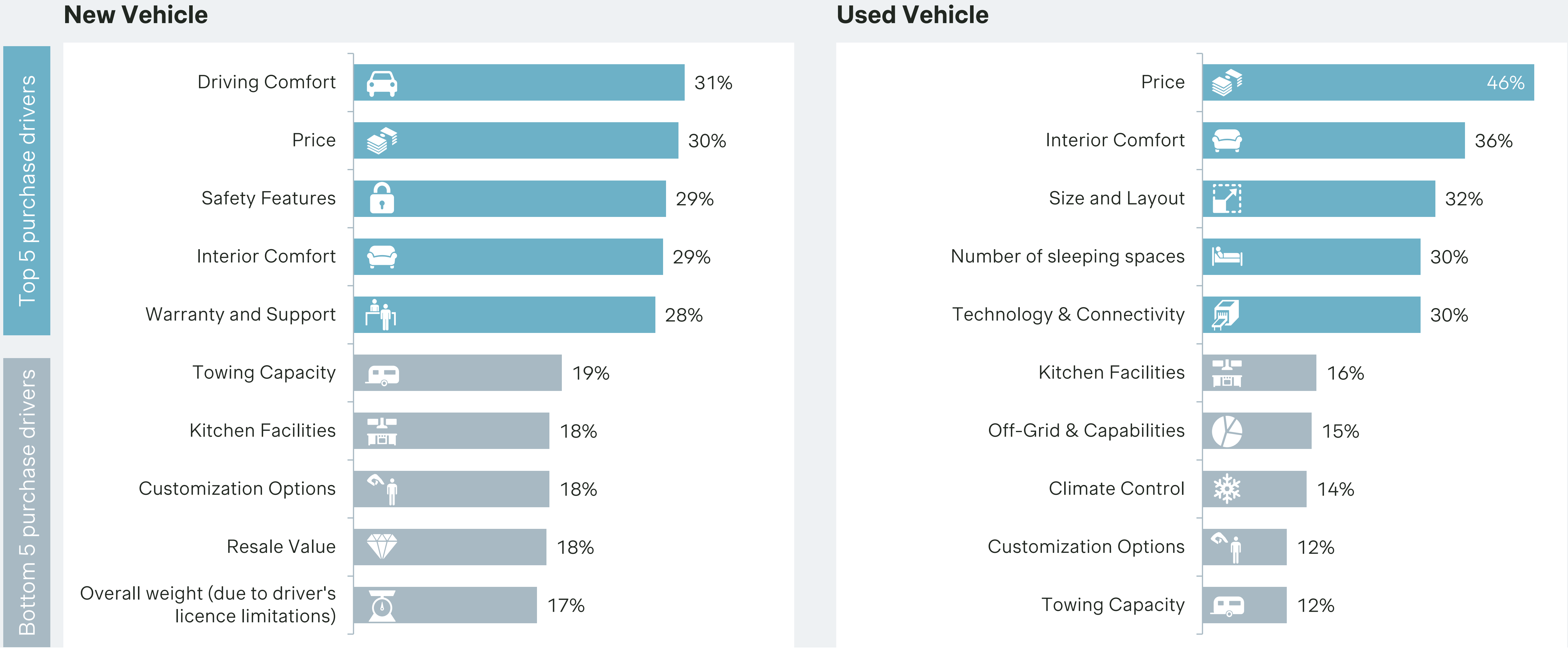
Most important purchase drivers in an RV
(Respondents who currently own an RV)



Source: Simon-Kucher Global Automotive Study, June 2025; n = 4,542 and n = 841 (overall sample size per question might vary, e.g., due to preselected answers); Q: What purchase drivers are most relevant to you when thinking about your RV? - Please select up to 8 key purchase drivers; Q: What purchase drivers are most important to you in your RV? - Please distribute 100 points based on the importance of each purchase driver.

While respondents with new RVs value driving comfort, owners of used RVs prioritize price

Most important purchase drivers in an RV (Respondents who currently own an RV)

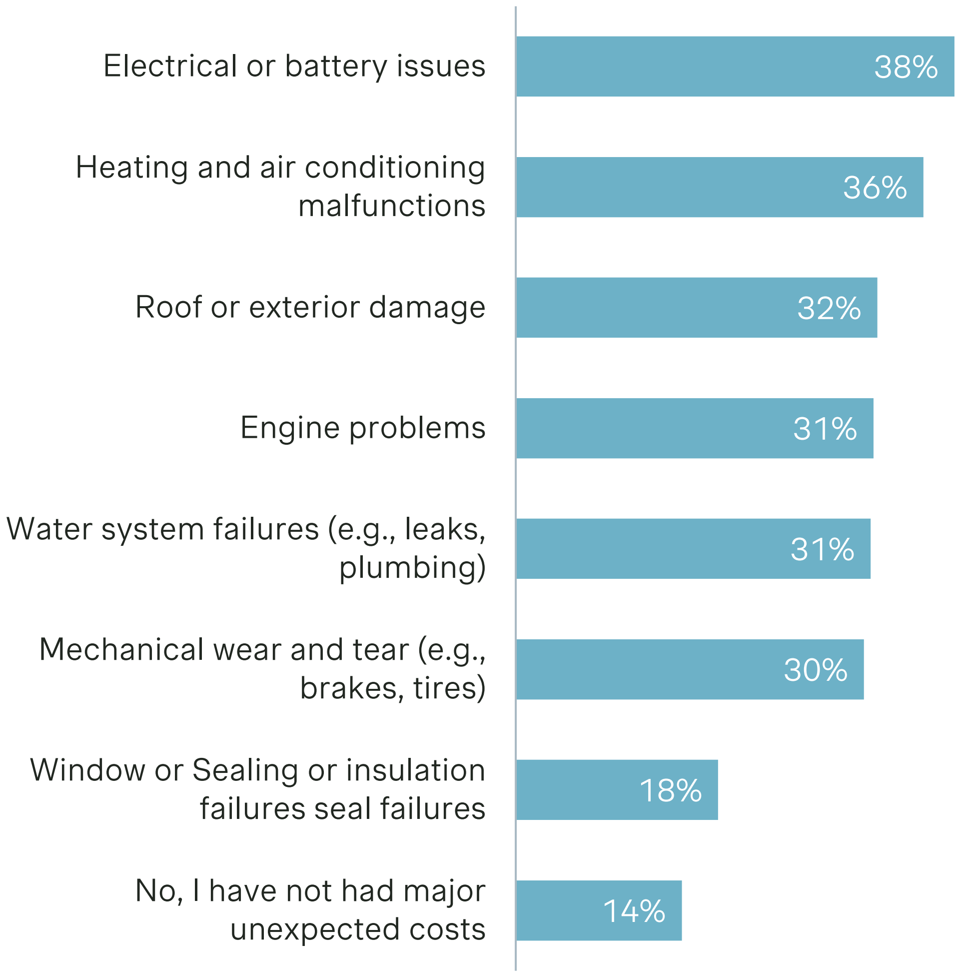


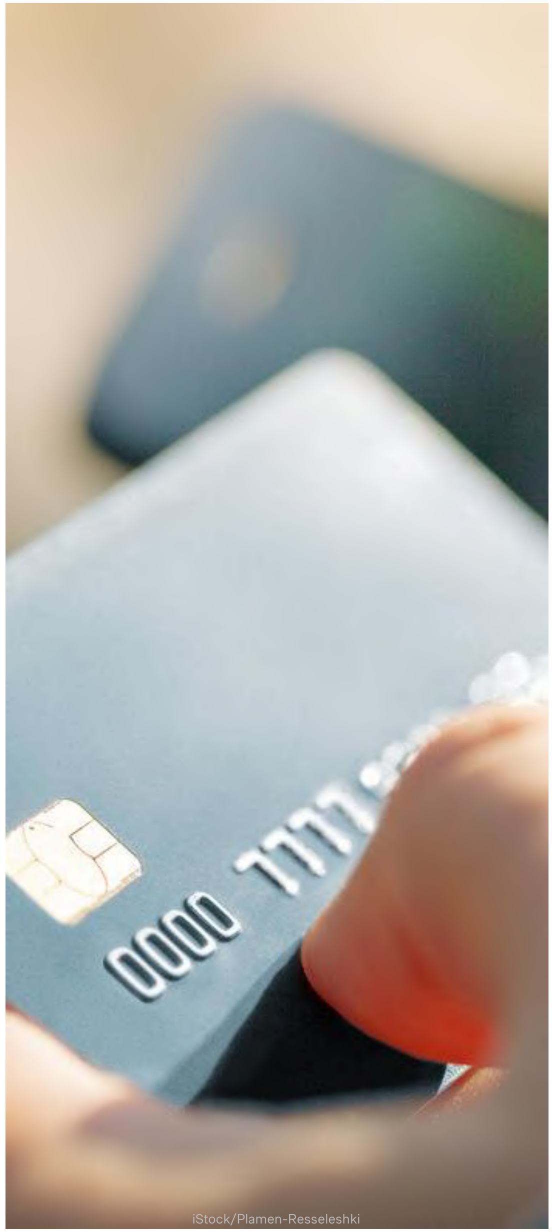
New Vehicle		Used Vehicle	
Driving Comfort	31%	Price	46%
Price	30%	Interior Comfort	36%
Safety Features	29%	Size and Layout	32%
Interior Comfort	29%	Number of sleeping spaces	30%
Warranty and Support	28%	Technology & Connectivity	30%
Towing Capacity	19%	Kitchen Facilities	16%
Kitchen Facilities	18%	Off-Grid & Capabilities	15%
Customization Options	18%	Climate Control	14%
Resale Value	18%	Customization Options	12%
Overall weight (due to driver's licence limitations)	17%	Towing Capacity	12%

Source: Simon-Kucher Global Automotive Study, June 2025; n = 841 (overall sample size per question might vary, e.g., due to preselected answers); Q: What purchase drivers are most relevant to you when thinking about your RV? - Please select up to 8 key purchase drivers;

New RV buyers tend to have issues with electric or battery issues, while used RV buyers expect higher mechanical wear and tear costs

Unexpected maintenance costs with new RVs





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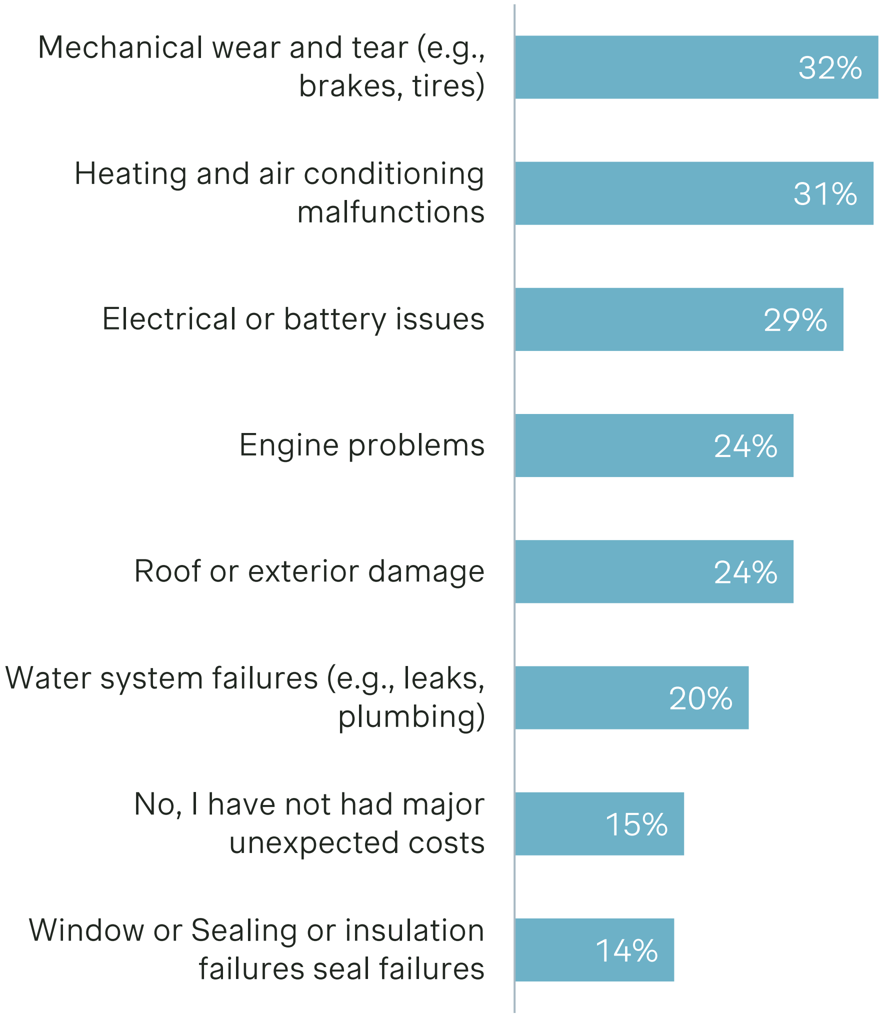
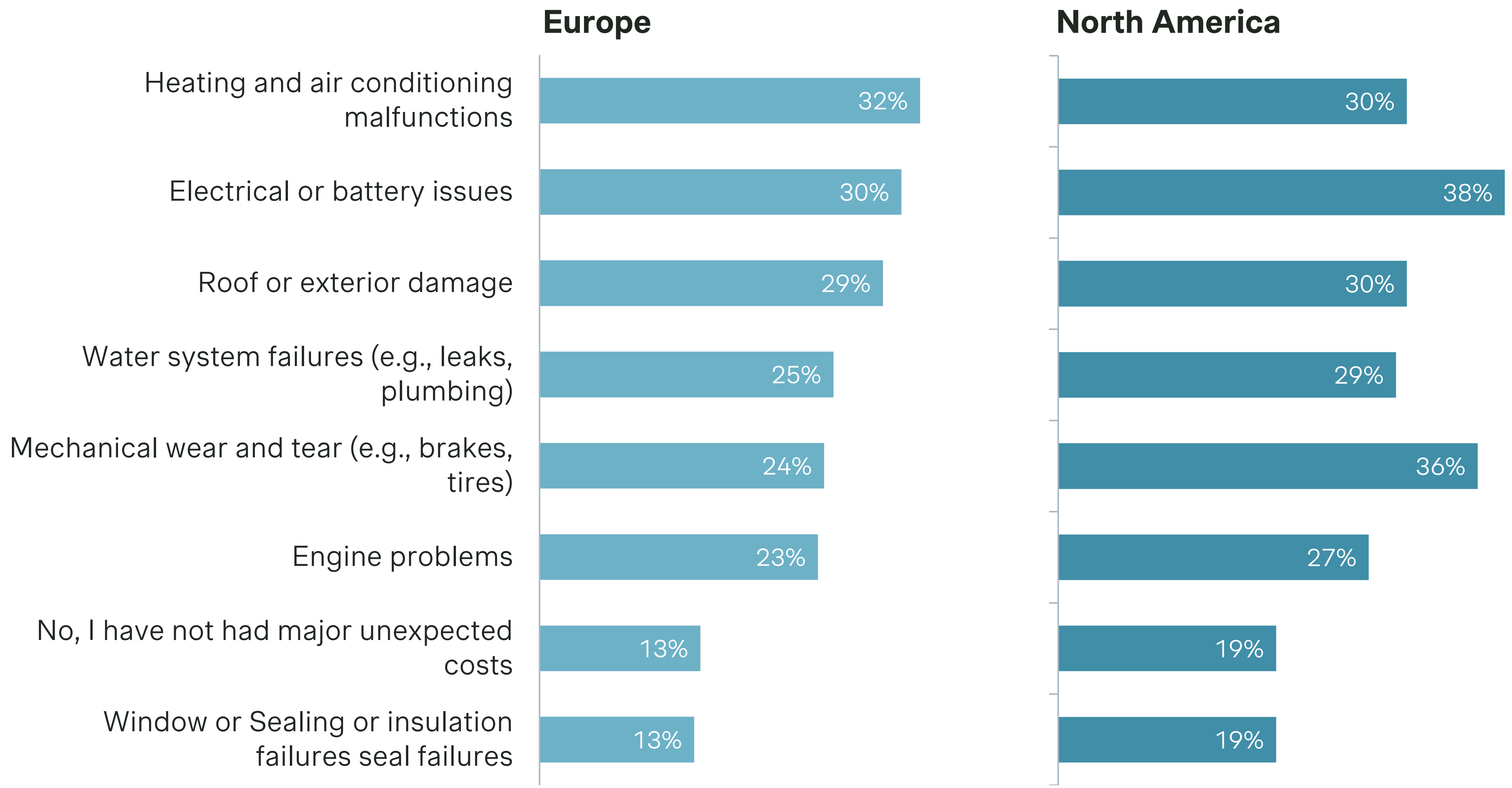
Unexpected maintenance costs with used RVs



Source: Simon-Kucher Global Automotive Study, June 2025; n = 1,079 (overall sample size per question might vary, e.g., due to preselected answers); Q: Have you faced unexpected maintenance costs with your RV before?

While overall experience is very similar in North America compared to the European market, electrical issues and wear and tear are real pain points for NA customers

Unexpected maintenance costs with RVs



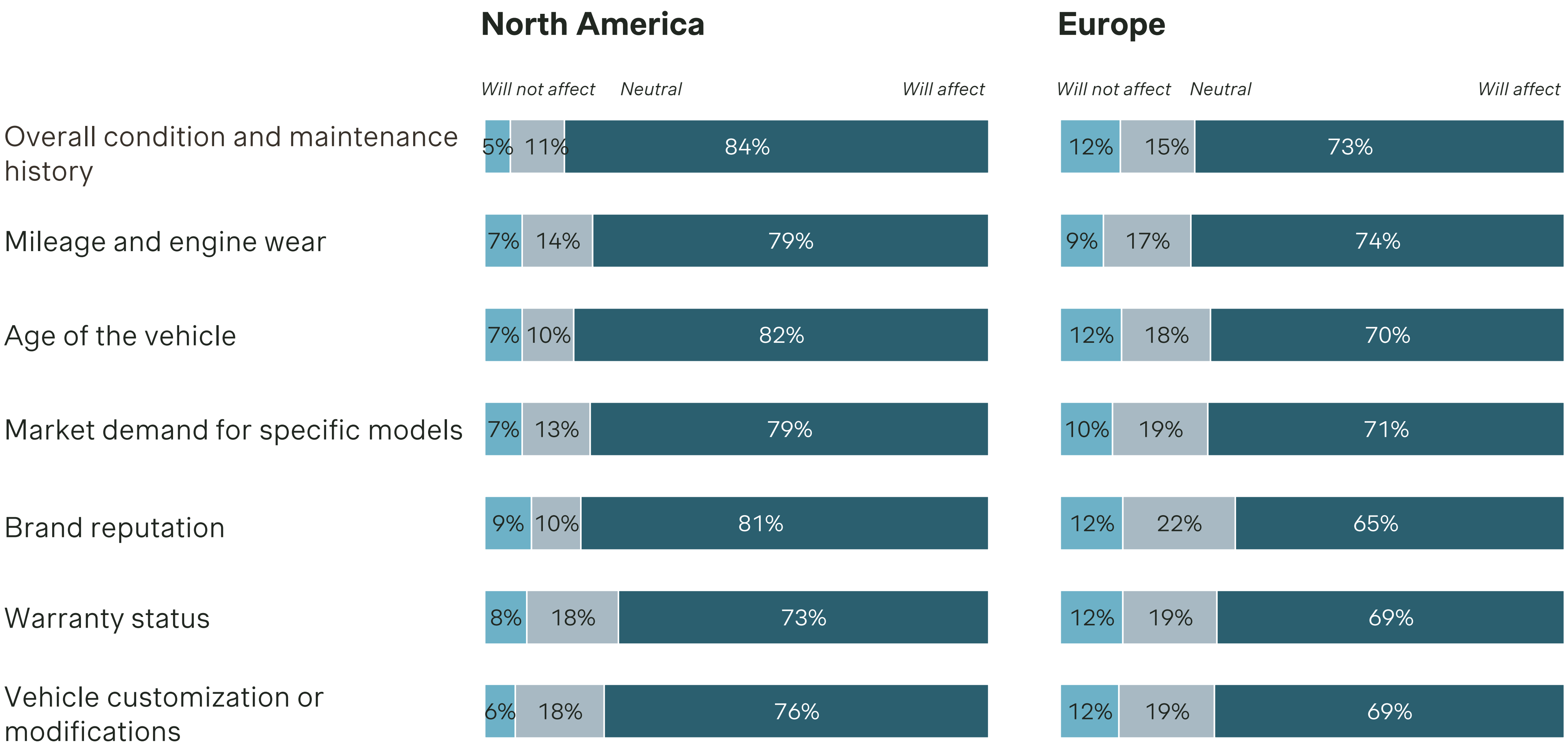
	Europe	North America
Heating and air conditioning malfunctions	32%	30%
Electrical or battery issues	30%	38%
Roof or exterior damage	29%	30%
Water system failures (e.g., leaks, plumbing)	25%	29%
Mechanical wear and tear (e.g., brakes, tires)	24%	36%
Engine problems	23%	27%
No, I have not had major unexpected costs	13%	19%
Window or Sealing or insulation failures seal failures	13%	19%


iStock/Plamen-Resseleshki

Source: Simon-Kucher Global Automotive Study, June 2025; n = 1,079 (overall sample size per question might vary, e.g., due to preselected answers); Q: Have you faced unexpected maintenance costs with your RV before?

Brand reputation is affecting resale value of an RV significantly more in North America compared to Europe

Factors affecting resale value of an RV

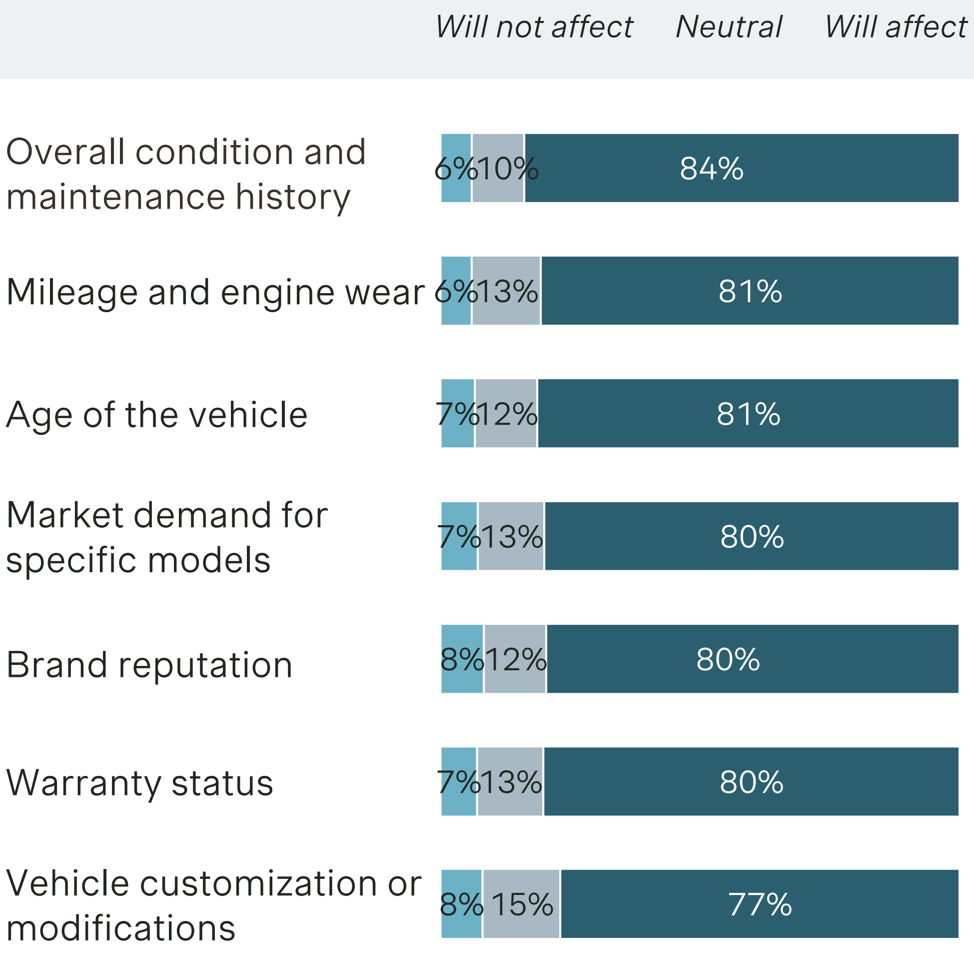


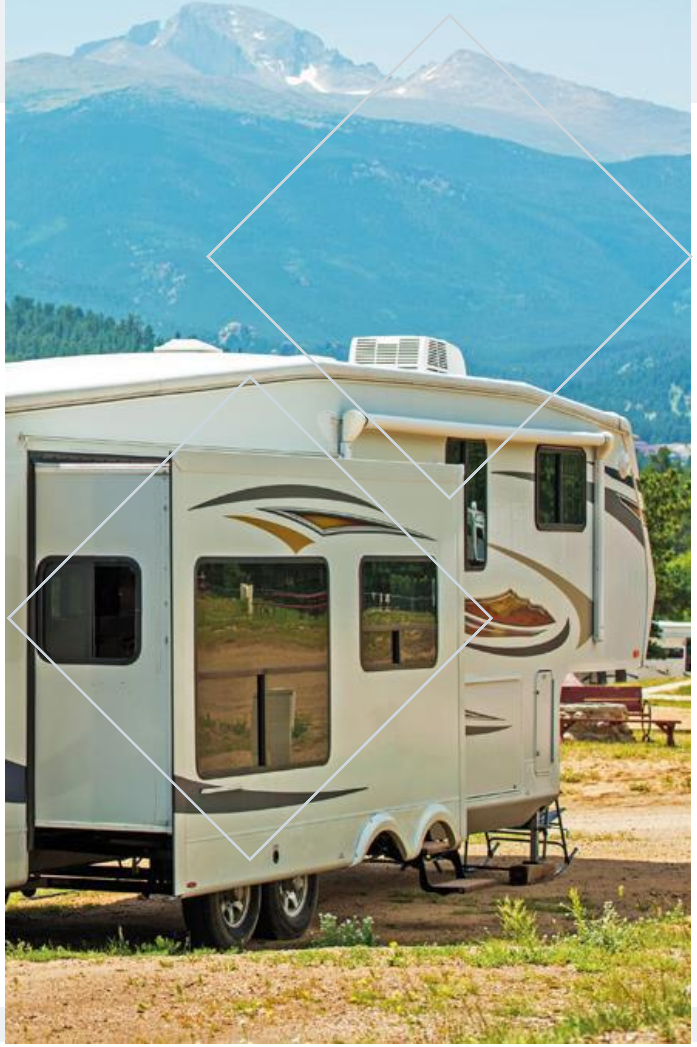
Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers); Q:What factors do you think affect the resale value of an RV? - 1 - Will definitely not affect -> 7 - Will definitely affect

Multiple factors influence RV resale value and will especially affect new RVs

Factors affecting resale value of an RV

For a new RV





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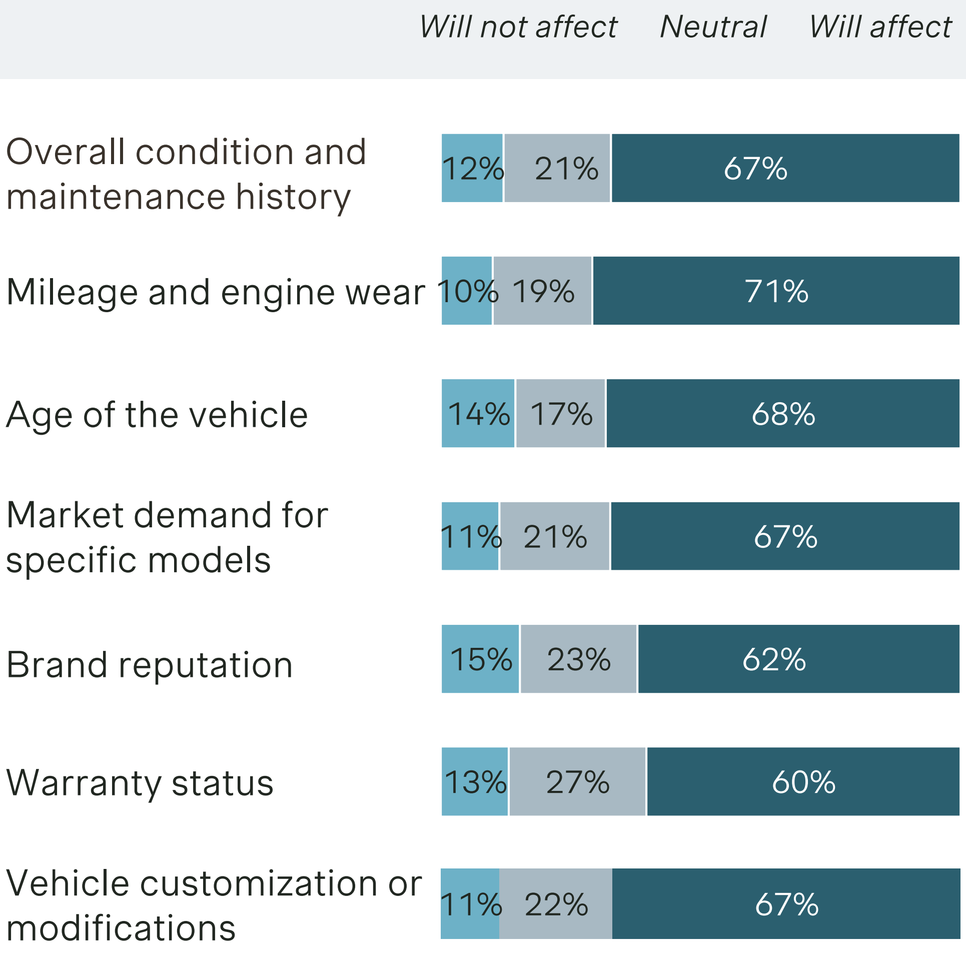
For a used RV



Source: Simon-Kucher Global Automotive Study, June 2025; n = 1,079 (overall sample size per question might vary, e.g., due to preselected answers); Q:What factors do you think affect the resale value of an RV? - 1 - Will definitely not affect -> 7 - Will definitely affect

This edition of the Simon-Kucher Global Automotive Study covers a representative range of private automotive buyers worldwide

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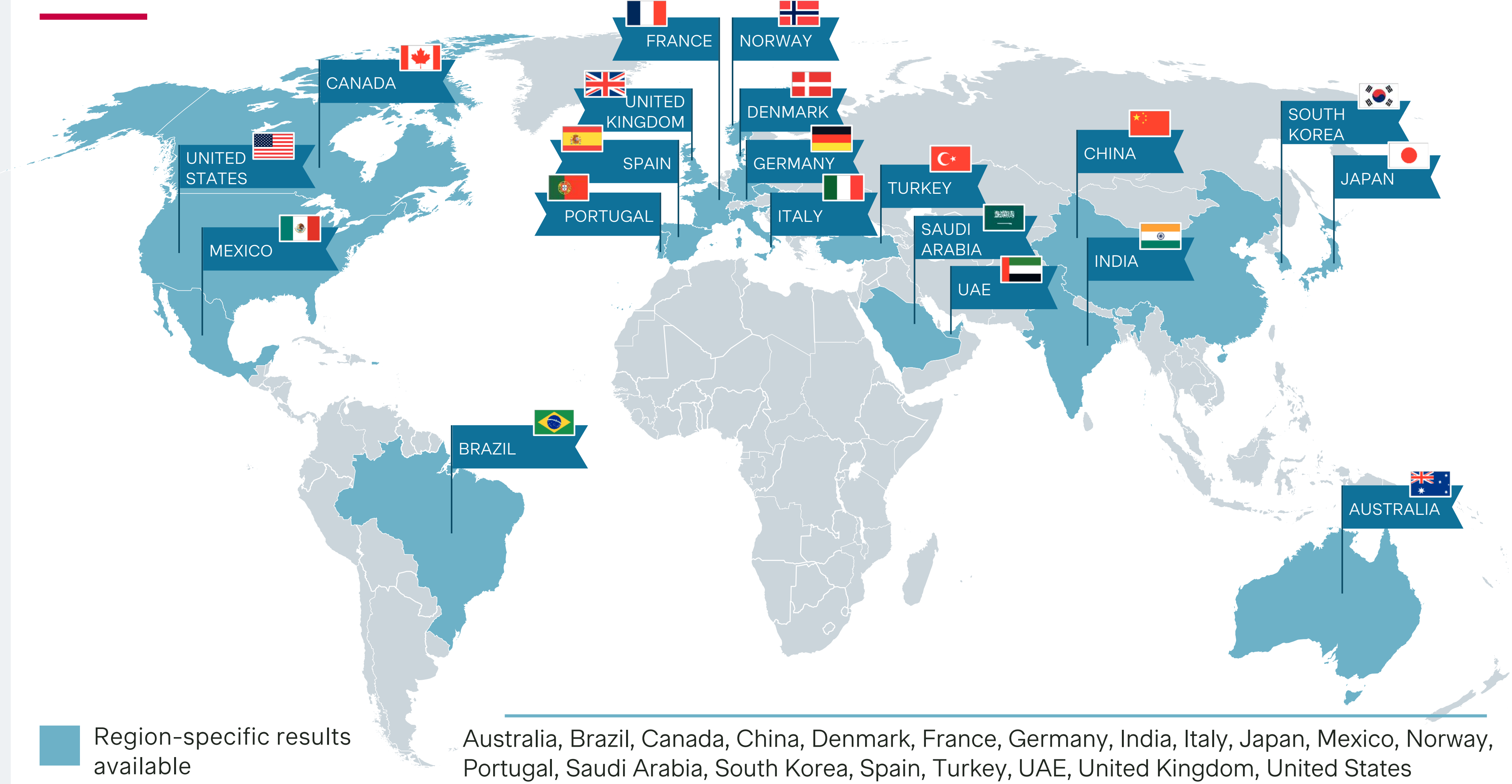
Regional coverage



🟦 Region-specific results available

Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Mexico, Norway, Portugal, Saudi Arabia, South Korea, Spain, Turkey, UAE, United Kingdom, United States

About the study

Method: Online

Date: Q2 2025

Respondents: 6,780

Profile: Private customers who intend to purchase/finance/lease a new/used car in the future

Demographics: Representative distribution across gender, age, and place of residence

Source: Simon-Kucher Global Automotive Study, June 2025; n = 6,780 (overall sample size per question might vary, e.g., due to preselected answers)

40 Years

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Better
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Simon-Kucher is a global consulting firm specializing in unlocking better growth

Our focus

- Optimizing **portfolio**, **pricing**, **sales**, and **marketing** to improve our clients' topline
- Accompanying our clients **from strategy** all the way **to implementation**
- Recommendations are **powered by benchmarks and research**

Our impact

- Depending on the industry and current excellence level, optimizing the topline **unlocks between 5 to 25% additional profit, measured as % of revenue**

1985	46	31	2,000+	200+
FOUNDED	OFFICES	COUNTRIES	EMPLOYEES	PARTNERS

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Dr. Martin Gehring
Senior Partner,
Head of Global Automotive Practice
Im Zollhafen 24
50678 Cologne, Germany
Tel: +49 221 36794 415
martin.gehring@simon-kucher.com

Matthias Riemer
Partner,
Global Automotive Expert
Im Zollhafen 24
50678 Cologne, Germany
Tel: +49 221 36794 320
matthias.riemer@simon-kucher.com

Alexander Dietz
Senior Director,
Global Automotive Expert
Luise-Ullrich-Str. 14
80636 Munich, Germany
Tel: +49 89 544793 256
alexander.dietz@simon-kucher.com