Worldwide Automotive & Mobility Barometer 2025 – France

Key insights from joint BCG x NielsenIQ-GfK consumer survey

MUNICH | 21.10.2025

Executive summary | Worldwide Automotive & Mobility Barometer 2025

Key takeaways from this study

- **What it is:** Global consumer study with >9,000 respondents across surveyed 10 countries; 1,000 responses in France
- **Powertrain:** Globally, there's a clear path to BEV emerging as 71% of BEV owners intend to repurchase electric and more people switch to electric than from electric back to other engine types. Still, today's ICE and Hybrid customers remain sticky, preferring their existing technology choice before switching to any other engine type
- **BEV resistance:** ~1 in 4 ICE/hybrid drivers in France and US/EU say they will never switch to BEV vs. only ~1 in 20 in China. Reducing vehicle costs, improving the product (charging time, driving range, battery life) and infrastructure are the key levers to convince sceptics – lack of infrastructure is perceived less of a barrier in France compared to rest of Europe, USA, and China
- **Chinese OEMs gain traction:** Although market shares remain modest, consideration is high: 10–20% of Europeans would consider a Chinese car (vs. 7% in the US) – France ranking lowest at 9%. Western incumbents must prepare for rapid scaling of Chinese brands
- **Brand loyalty:** Customer loyalty is only limited shield vs. competition. China ranks lowest in loyalty (<15%) vs. >30% in France, rest of Europe and USA (35-40%). Globally, OEMs cannot rely on brand alone as protection against newcomers
- **Digital sales:** 31% of consumers are open to buying fully online (25% in France), but >50% still trust dealership advice most - OEMs must create hybrid sales models blending digital convenience with dealer-based advisory roles
- **Autonomous driving openness:** 61% of Chinese consumers and 45% of Brazilians would ride in a fully autonomous taxi, while only ~30–34% in the US and Europe (26% in France) show interest – Western markets still require trust-building
- **Autonomous driving adoption follows exposure:** Globally, 79% find L2+ automation helpful after trial vs. 45% pre-trial, yet many still enjoy driving themselves. OEMs must invest in experiential marketing & trial programs to close perception gap & unlock demand
- **No dominant ecosystem:** OEM platforms retain relevance, but Apple/Google dominate globally and Chinese systems thrive locally. OEMs must offer a broad digital ecosystems choice

Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Key facts about this survey

Survey designed by BCG and NielsenIQ-GfK for Worldwide Automotive & Mobility Barometer 2025

>9,000
respondents interviewed

94%
currently own a car[1]

>50
close-ended questions included

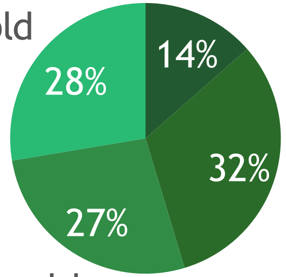
June-July 2025
survey field work

10
countries in scope

mixed
share of current engine types driven

50/50 mixed
male/female respondent share

Age groups



Collaboration

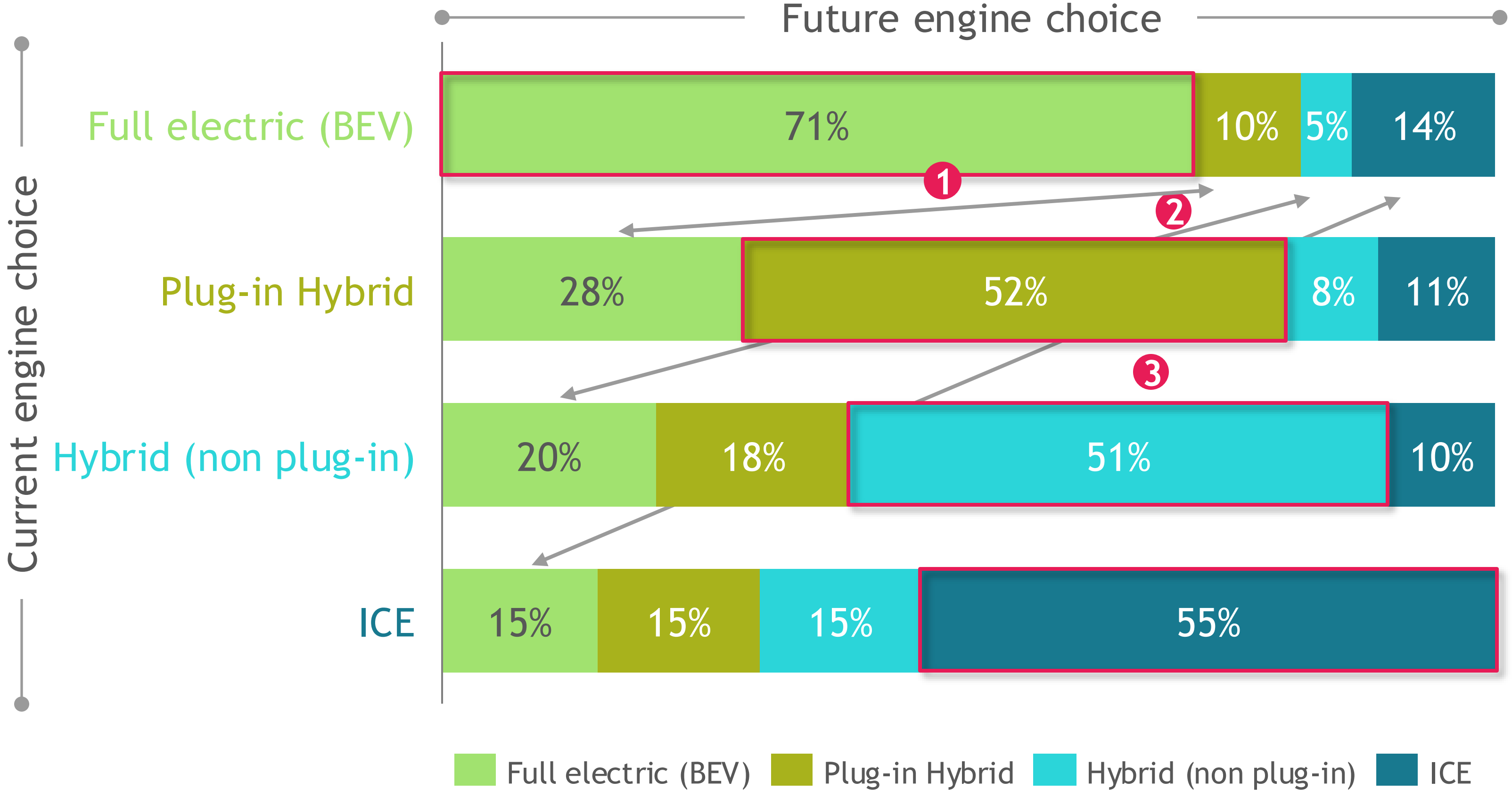
- Survey design: NIQ-GfK and BCG
- Survey programming & organization: NIQ-GfK
- Panel sample supply: Dynata
- Results analyses: BCG

1. Remaining 6% intend to buy a car
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Powertrain: Clear path to BEV emerging, but still stickiness of ICE & Hybrid

Which vehicle will most likely be your first choice?

Global survey responses



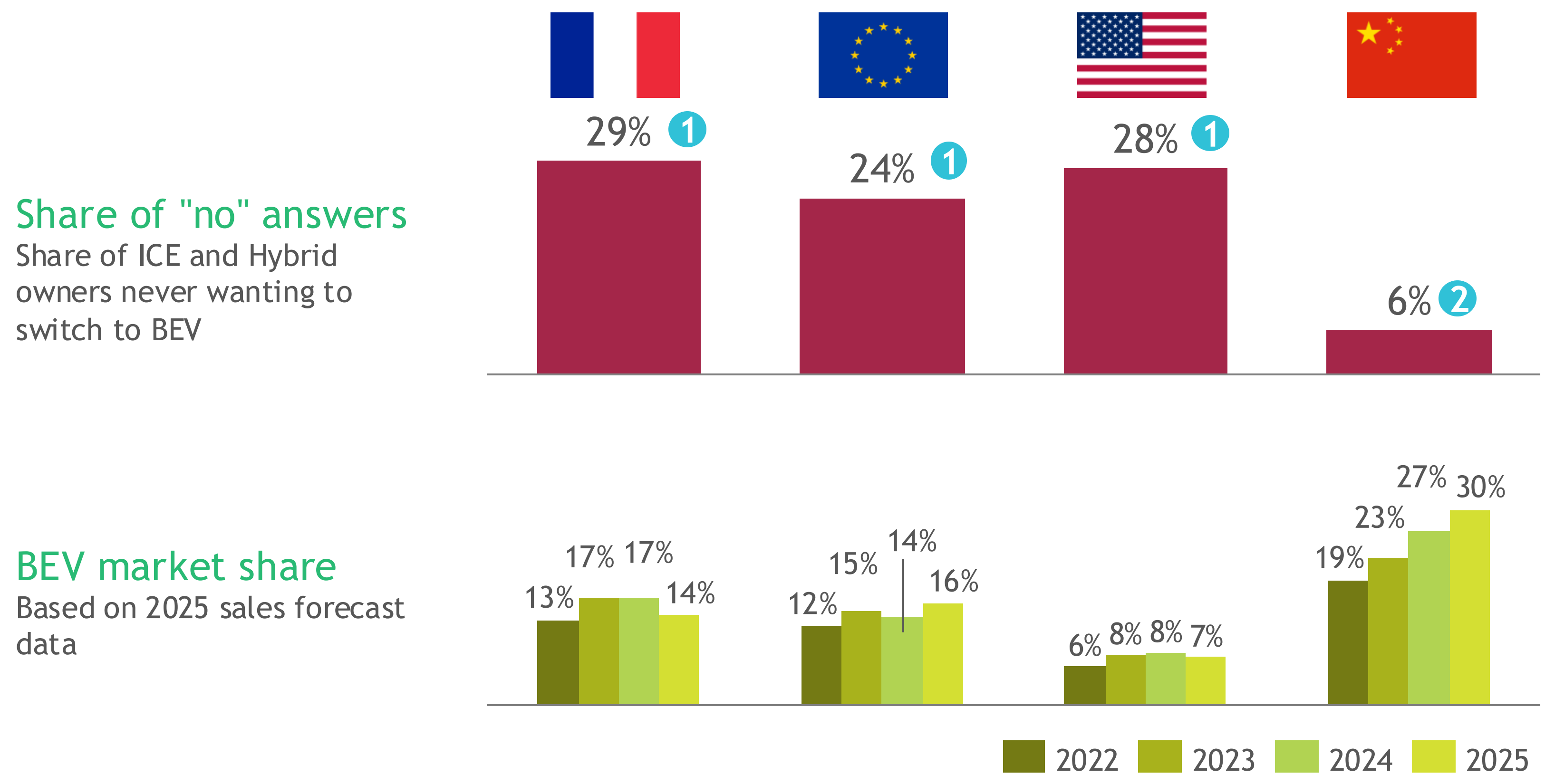
Commentary

1. Current powertrain best predicts future powertrain choice: customers are "sticky" across all engine types
2. Clear path towards BEV emerging: More customers switch to BEV than from BEV back to any other powertrain
3. (P)HEVs serve as bridge technology choice for BEV, but stickiness means technology is "here to stay" for the foreseeable future

Source: NielsenIQ-GfK & Boston Consulting Group - Worldwide Automotive & Mobility Barometer 2025 with N = 9,000 (global survey analysis); BCG analysis.

Powertrain: Still major reservations towards BEVs in EU/US, high openness in CN

Will you ever consider to switch to a BEV?



Commentary

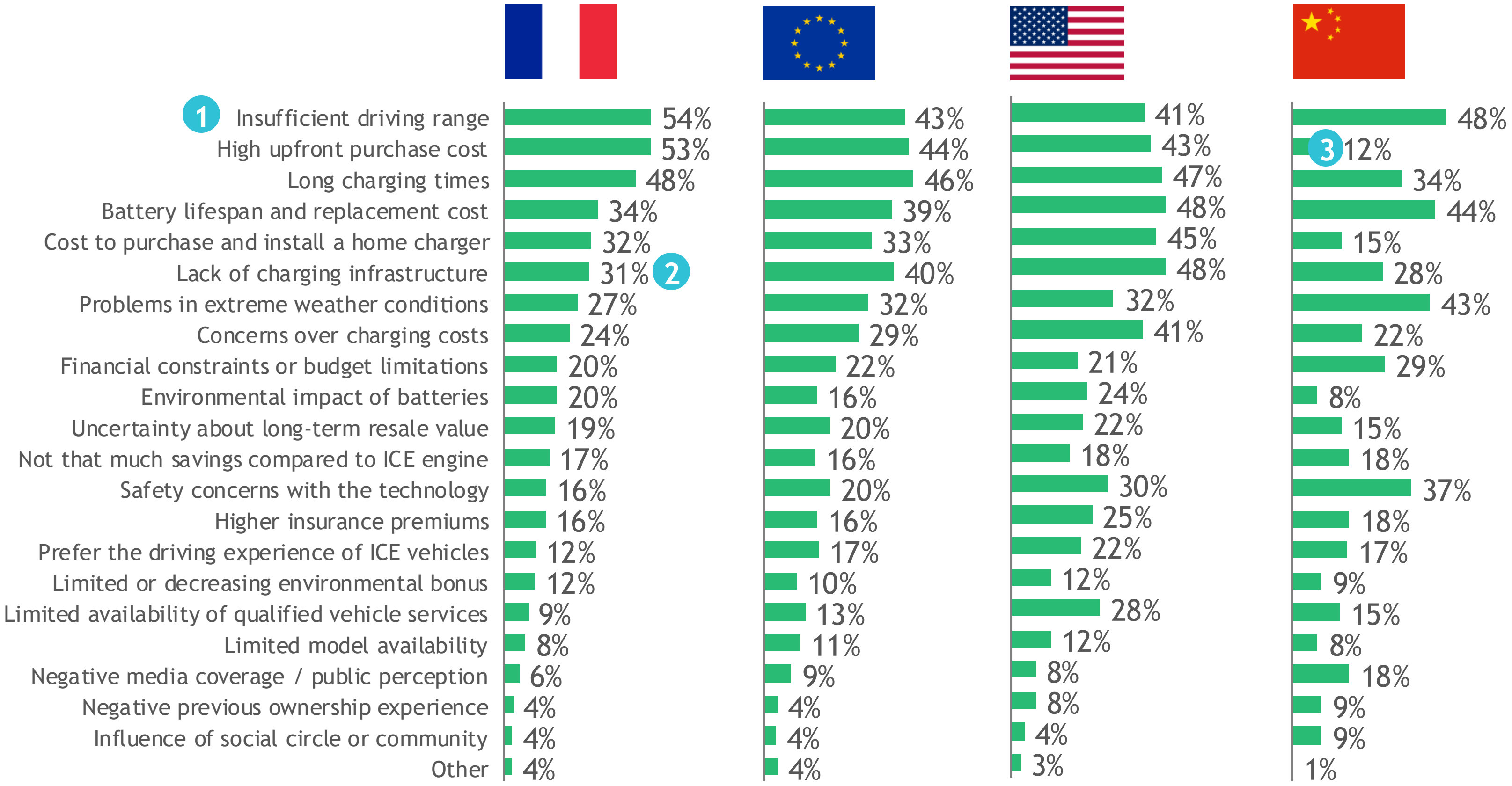
1. Europe and the US show high resistance: 24–28% of ICE and hybrid owners say they will never consider a BEV, France positioned at higher end with 29%
2. In contrast, only 6% in China say they would never switch - indicating higher openness to BEVs

- Reducing costs, improving the product (charging time, driving range, battery life) and infrastructure are the key levers to convince sceptics

Note: Question was only asked to current ICE and hybrid owners
Source: NielsenIQ-GfK & Boston Consulting Group - Worldwide Automotive & Mobility Barometer 2025; Eurostat; European Automobile Manufacturers' Association; US Department of Energy; China passenger car registrations; S&P Global Mobility, light vehicle sales FC, Aug 2025; Statista Market Insights - proprietary forecast data; BCG analysis.

BEV switch: Insufficient driving range, high vehicle cost, and long charging times are key barriers to adoption of BEVs in France

You do not consider an electric powertrain for your next vehicle. What are your main reasons for this decision?



Commentary

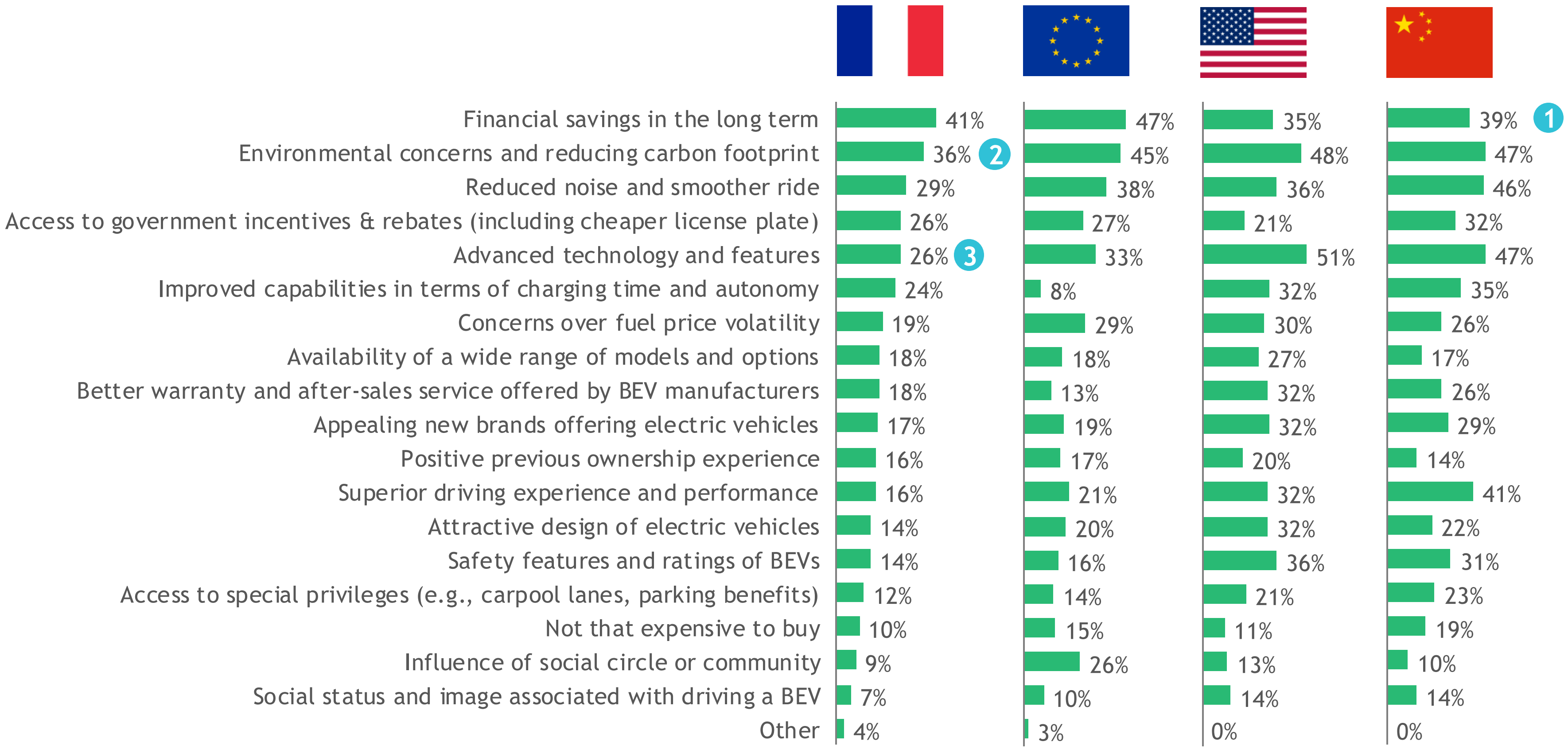
1. Insufficient driving range perceived as most hindering in France, also ranking high in Europe, USA, and China
2. Lack of charging infrastructure less of a barrier in France compared to the rest of Europe, and the USA
3. Due to government funding and high competition high vehicle costs are less a barrier in China than Europe, USA, France

- Many of the purchase barriers will be solved by future EV developments

Note: Multiple choices possible to select for respondents
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

BEV switch: Financial savings in the long term and environmental concerns are the top reasons for French consumers to switch to BEVs

You have indicated that you intend to buy a battery electric vehicle. What are the main reasons for you to buy an electric vehicle?



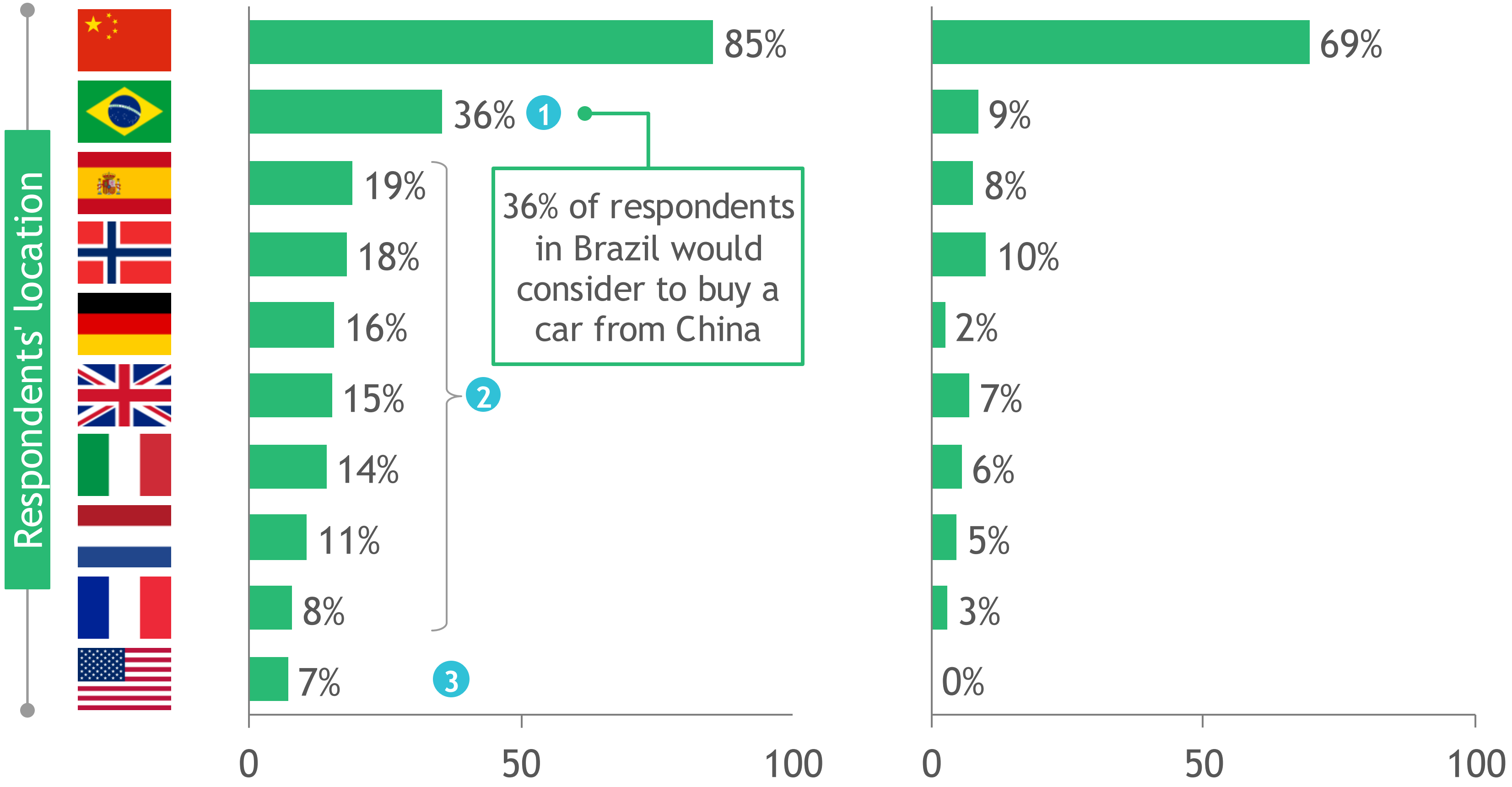
Commentary

1. Financial savings are a top motivator across regions including France
2. Environmental concerns are an important aspect in France, as well as Europe, China, and the USA
3. Tech features are perceived less important in France compared to the rest of Europe and other regions (#1 reason in US and China)

Note: Multiple choices possible to select for respondents
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Chinese brands: Increasingly, people are open to buying a Chinese car

Would you consider to buy a car from China? | Expected 2025 Market share of Chinese OEMs



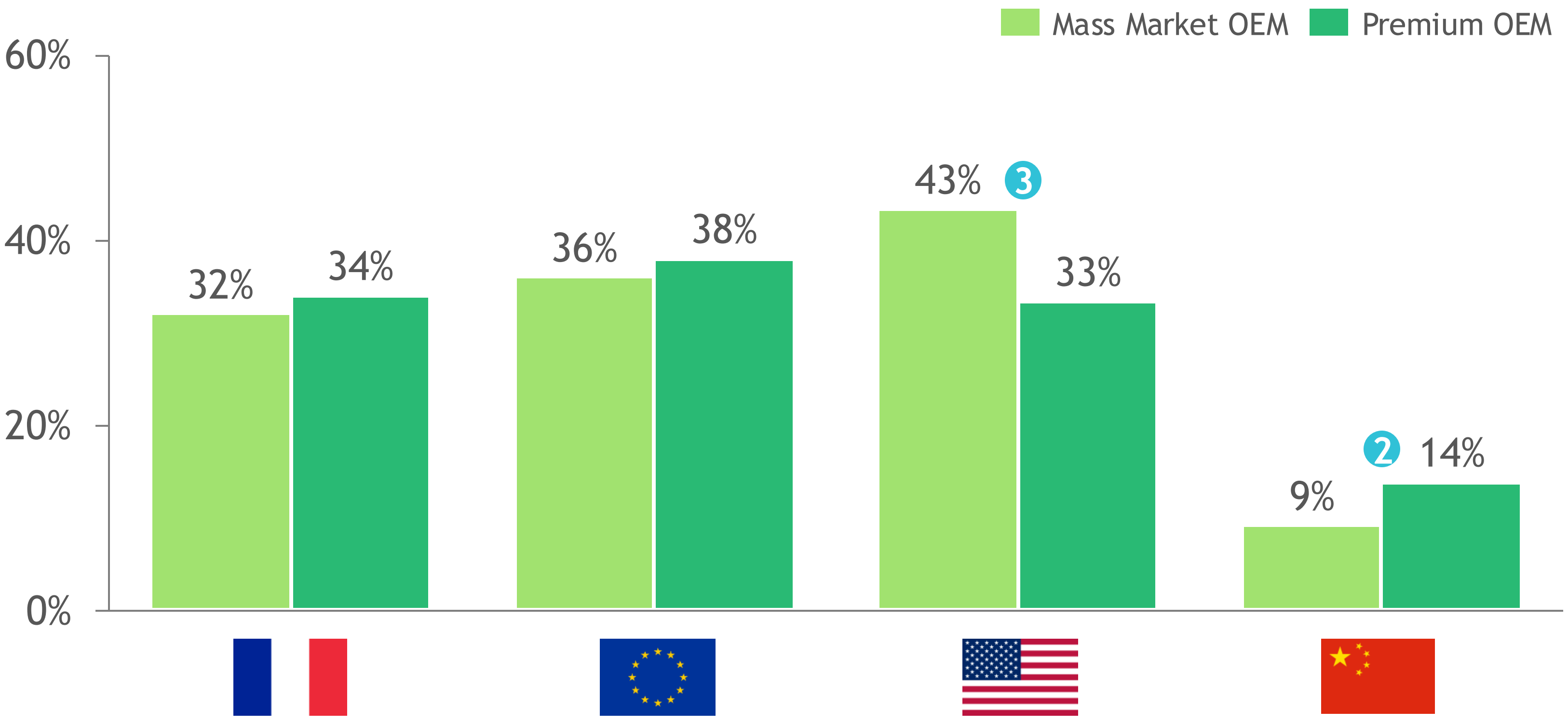
Commentary

1. Already today, 10-20% of European customers are open to buying Chinese vehicles
2. Brazil shows high openness to Chinese brands linked to aggressive expansion by Chinese brands and local production push
3. US ranks clear bottom, fueled by US-CN geopolitical tensions

Note: Question was asked for multiple countries: "Among which of the following countries would you consider to buy a vehicle from?"
Source: NielsenIQ-GfK & Boston Consulting Group - Worldwide Automotive & Mobility Barometer 2025; S&P Global Mobility, light vehicle sales, Aug 2025; BCG analysis.

Brand loyalty: Reliance on existing customers not sufficient, esp. in China

Would you purchase the brand you currently own as your next car?



Commentary

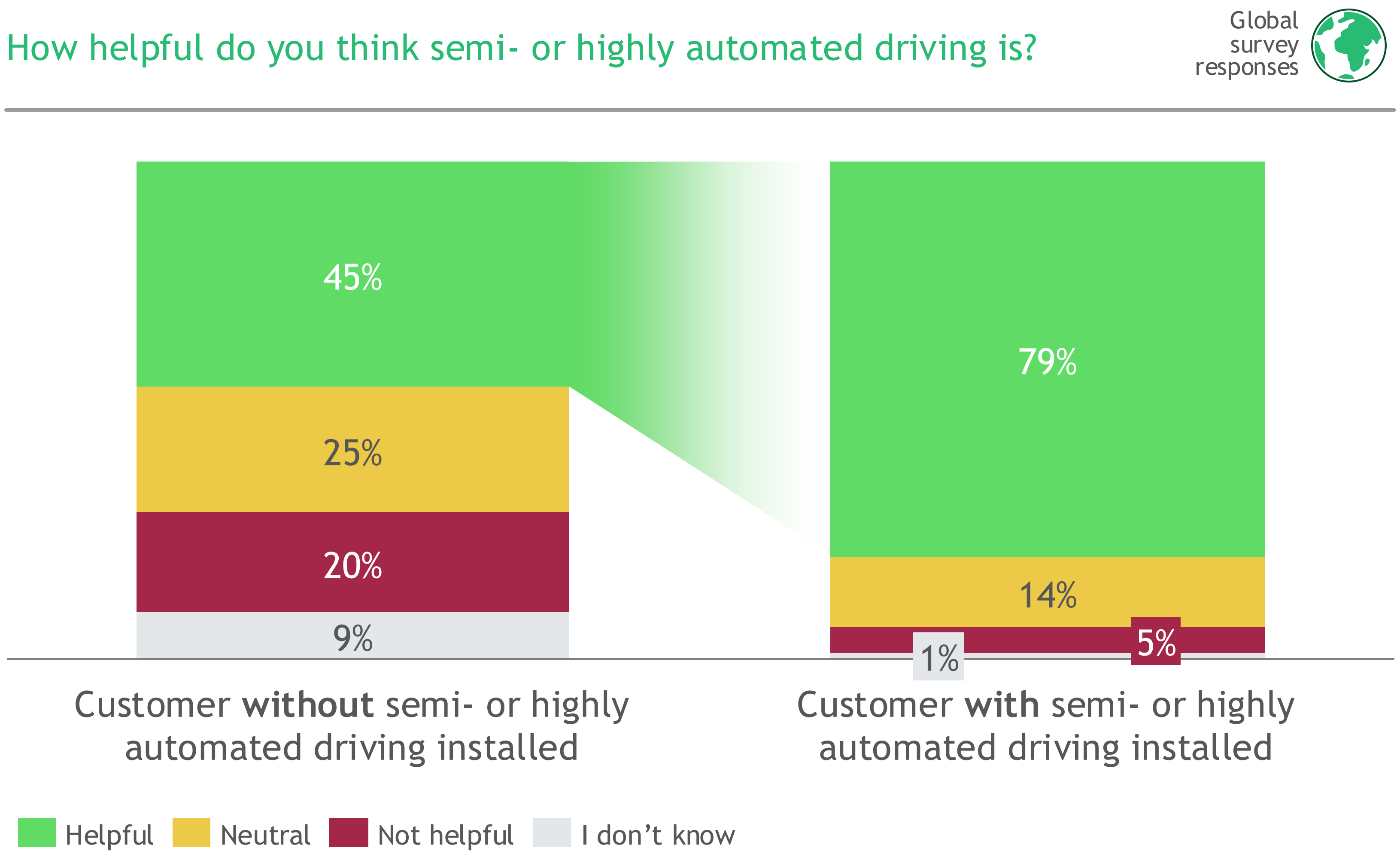
1. Brand loyalty in France similar to European average
2. China with very low brand loyalty score
3. In the US, loyalty is more fragmented - indicating a higher willingness to explore alternatives

- Globally, OEMs cannot rely on their brand as a singular protection against competitors

Note: Percentages denotes share of people stating they would purchase the same brand they currently own when asked "Which vehicle brand would you buy next?"
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

ADAS/AD: L2+ perceived helpful by users with access to the technology

How helpful do you think semi- or highly automated driving is?



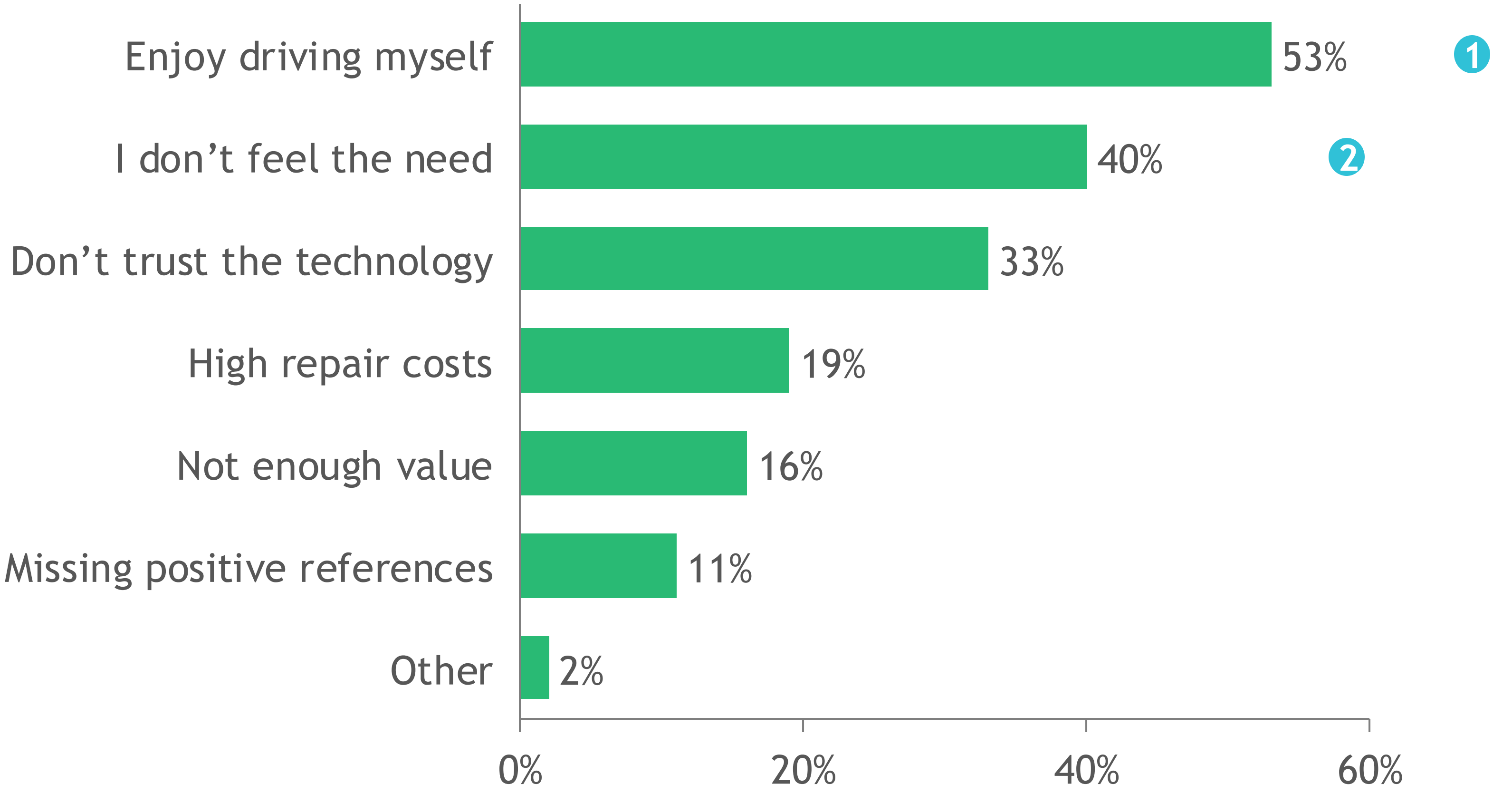
Commentary

- The share of respondents who perceive L2+ AD features as helpful significantly rises when they can experience them

Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025 with N = 9,000 (global survey analysis); BCG analysis.

ADAS/AD: French customers still enjoy driving themselves and feel less need for automated driving

Why do you believe that semi- or highly automated driving is not helpful?



Commentary

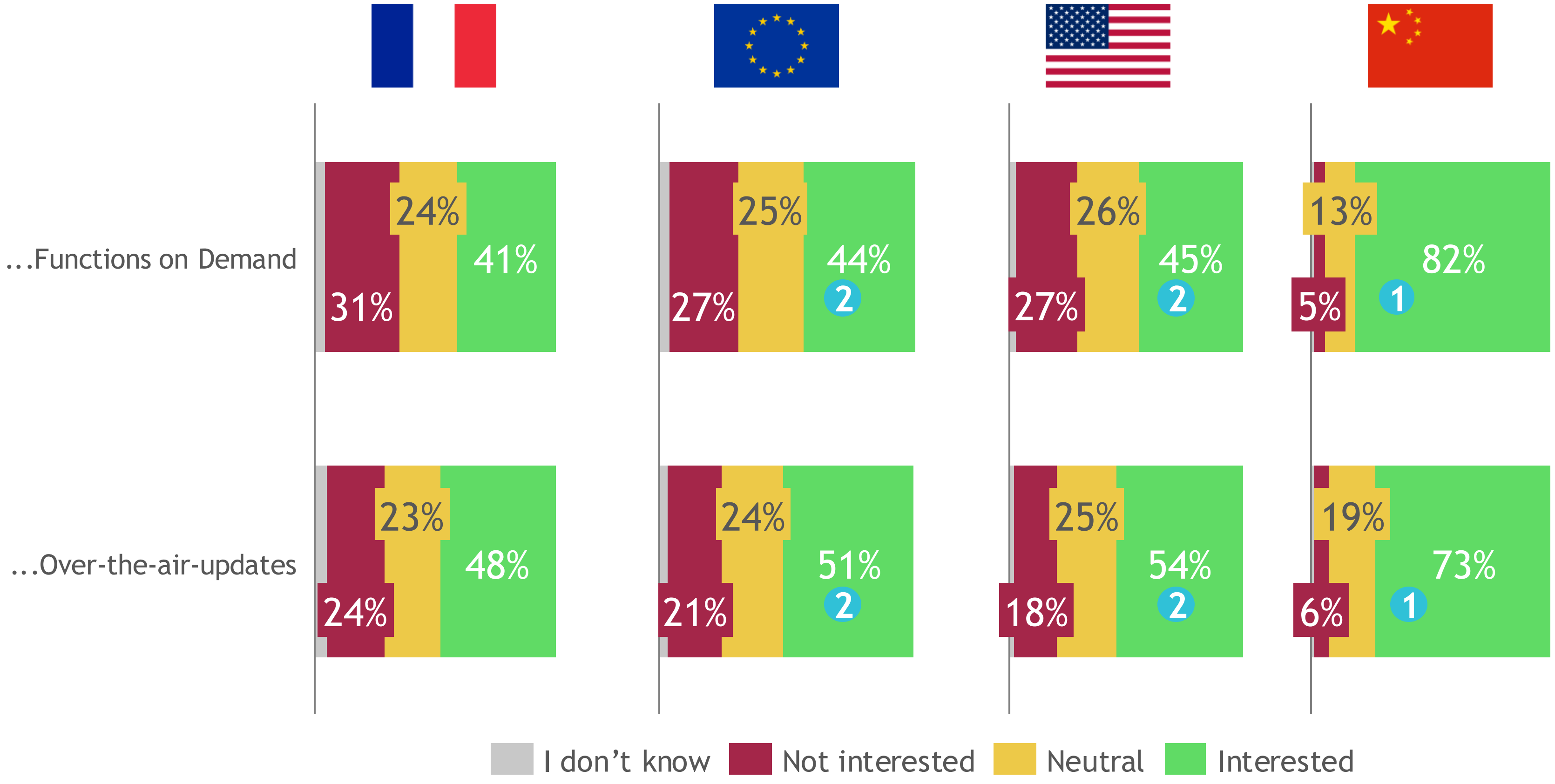
1. Enjoying to drive oneself is the top reason customers are hesitant towards L2+ AD technologies
2. Lack of clear need is second most important aspect in France

- OEMs need to invest into experience marketing and trials to unlock demand in France

Note: Only respondents who indicated that they did not think semi- or highly automated driving was helpful were asked the question; multiple choices possible
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

On-demand: Chinese customers are significantly more open vs. France, EU / US

How much are you interested in...?



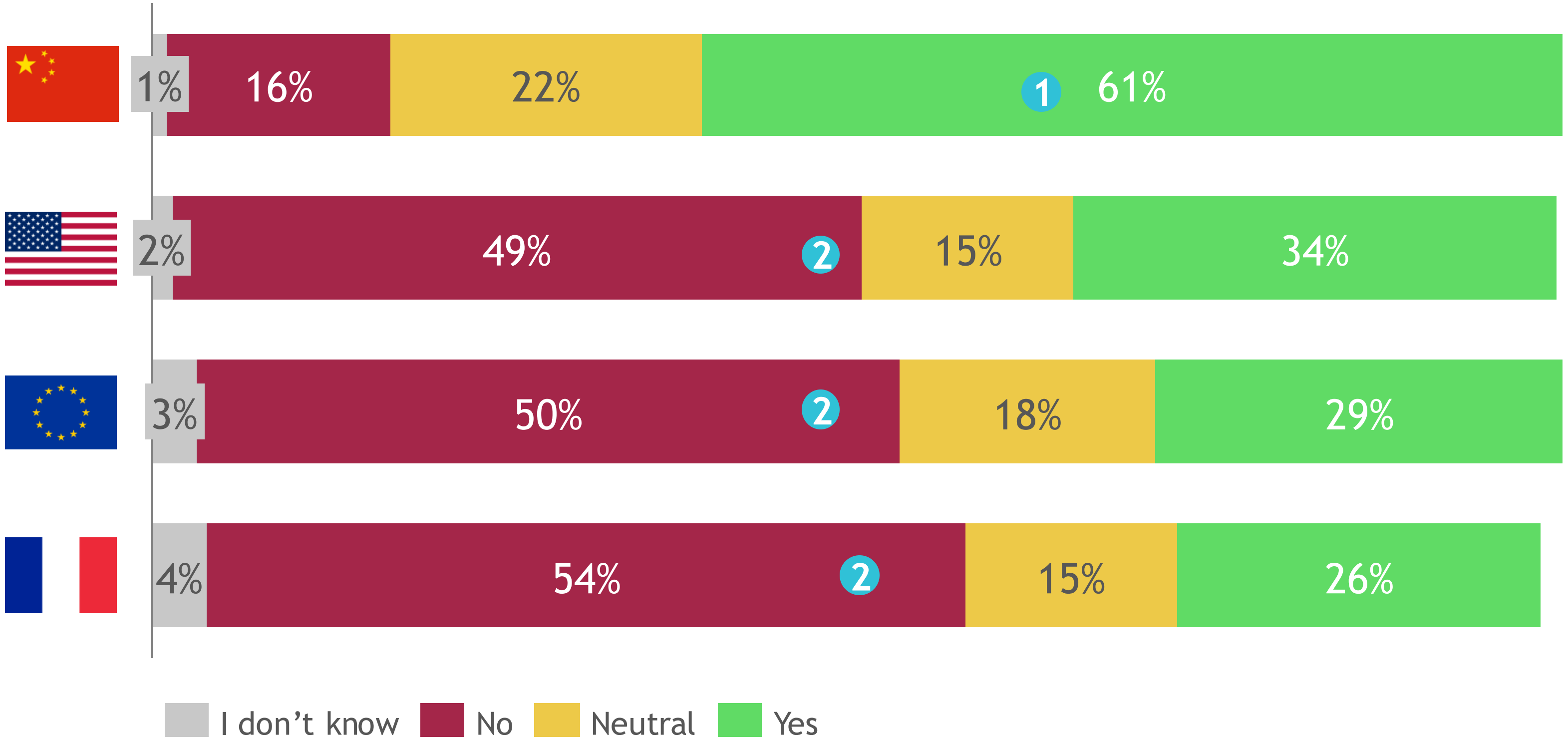
Commentary

1. Interest in function-on-demand (FOD) upgrades and over the air (OTA) updates is highest in China
2. In the US and France, and rest of Europe, interest is significantly lower

Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Ride-hailing: Chinese customers are most open to innovation

Would you take a ride in a fully autonomous driving taxi service?



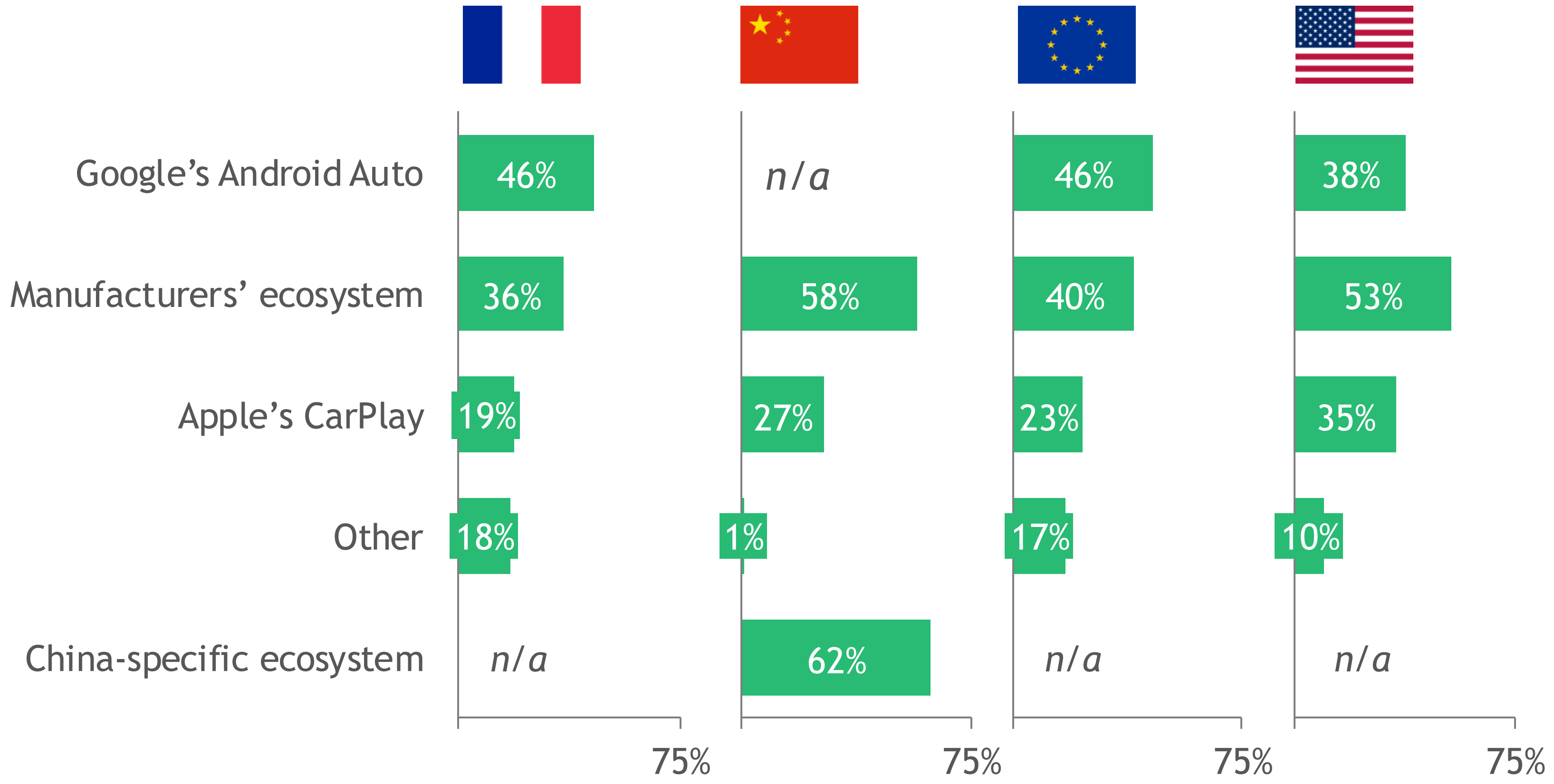
Commentary

1. 61% of Chinese consumers are open to riding in a fully autonomous taxi – by far the largest openness across regions
2. European countries including France and the U.S. show more skepticism

Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Ecosystems: OEMs should expect to offer a broad choice

Which digital ecosystem(s) do you want to use in your (next) vehicle?



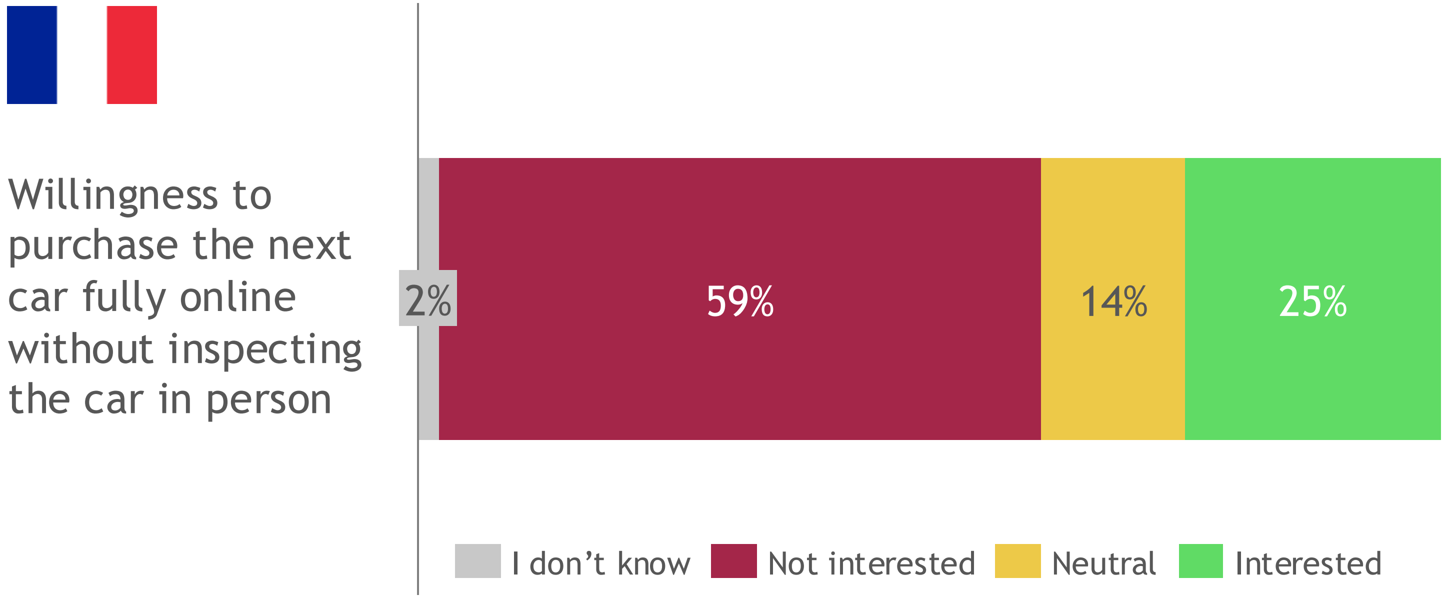
Commentary

- No clear dominant ecosystem emerges
- OEMs' own ecosystems still play an important role in all surveyed markets
- Google and Apple both capture relevant share – OEMs can't leave either out in their offerings
- Multitude of local ecosystems in China

Note: Multiple responses were possible; CN specific systems include Huawei's HiCar, Xiaomi Universe / HyperOS, Baidu's CarLife, Tencent Auto Intelligent System, AliOS, and Flyme Auto
Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Sales: Already, 25% of French are interested in buying a car fully online

How much are you interested in purchasing your next car fully online without prior inspection?



Source: NielsenIQ-GfK & Boston Consulting Group – Worldwide Automotive & Mobility Barometer 2025; BCG analysis.

Disclaimer

The services and materials provided by Boston Consulting Group (BCG) are subject to BCG's Standard Terms (a copy of which is available upon request) or such other agreement as may have been previously executed by BCG. BCG does not provide legal, accounting, or tax advice. The Client is responsible for obtaining independent advice concerning these matters. This advice may affect the guidance given by BCG. Further, BCG has made no undertaking to update these materials after the date hereof, notwithstanding that such information may become outdated or inaccurate.

The materials contained in this presentation are designed for the sole use by the board of directors or senior management of the Client and solely for the limited purposes described in the presentation. The materials shall not be copied or given to any person or entity other than the Client (“Third Party”) without the prior written consent of BCG. These materials serve only as the focus for discussion; they are incomplete without the accompanying oral commentary and may not be relied on as a stand-alone document. Further, Third Parties may not, and it is unreasonable for any Third Party to, rely on these materials for any purpose whatsoever. To the fullest extent permitted by law (and except to the extent otherwise agreed in a signed writing by BCG), BCG shall have no liability whatsoever to any Third Party, and any Third Party hereby waives any rights and claims it may have at any time against BCG with regard to the services, this presentation, or other materials, including the accuracy or completeness thereof. Receipt and review of this document shall be deemed agreement with and consideration for the foregoing.

BCG does not provide fairness opinions or valuations of market transactions, and these materials should not be relied on or construed as such. Further, the financial evaluations, projected market and financial information, and conclusions contained in these materials are based upon standard valuation methodologies, are not definitive forecasts, and are not guaranteed by BCG. BCG has used public and/or confidential data and assumptions provided to BCG by the Client. BCG has not independently verified the data and assumptions used in these analyses. Changes in the underlying data or operating assumptions will clearly impact the analyses and conclusions.

BCG BOSTON CONSULTING GROUP