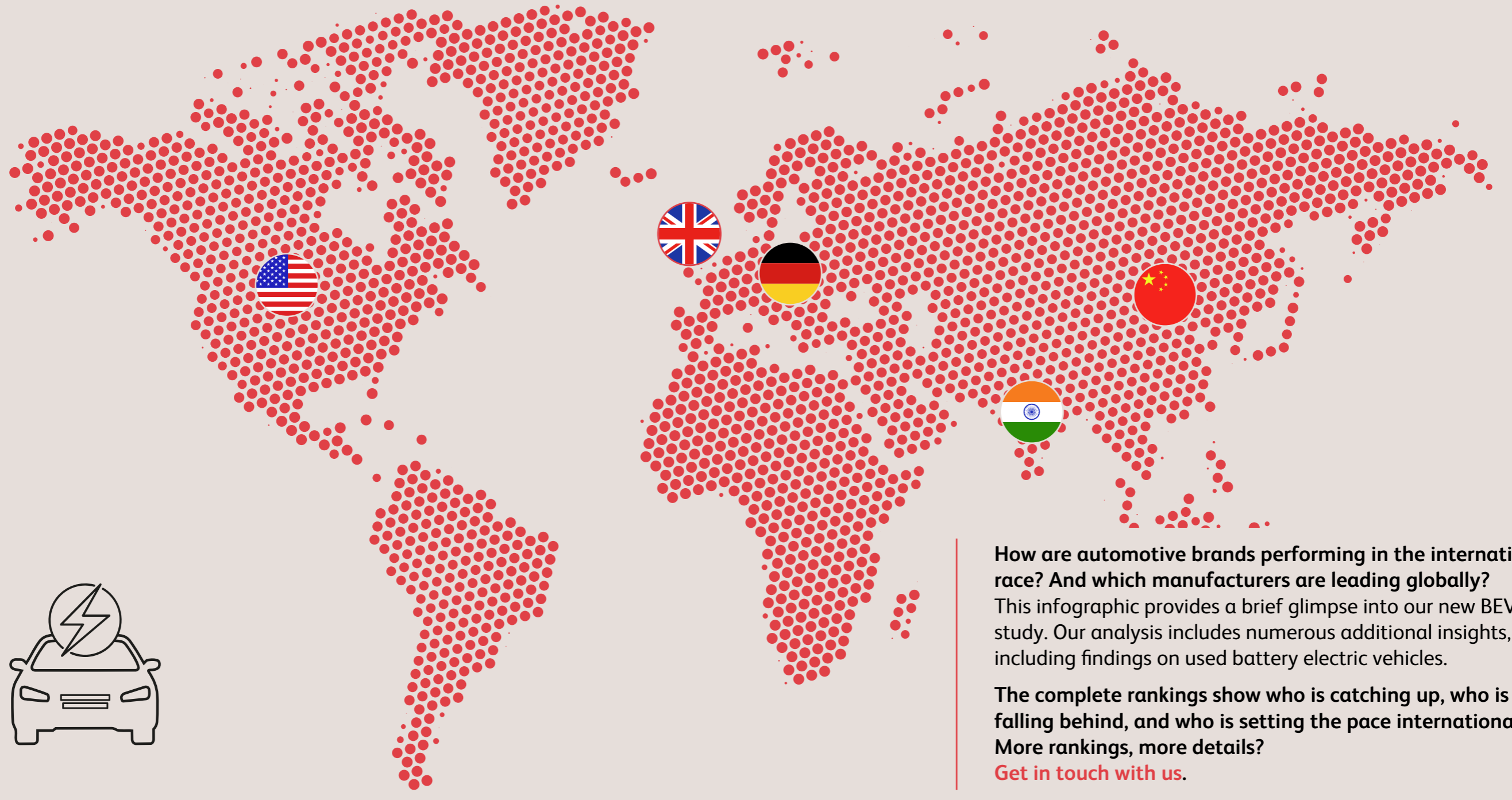


# Electromobility Attractiveness Index 2026

Insights from more than 10,000 respondents across 5 markets



## Extract | International Insights

### Top 3 considered brands by private consumers for new battery electric vehicles

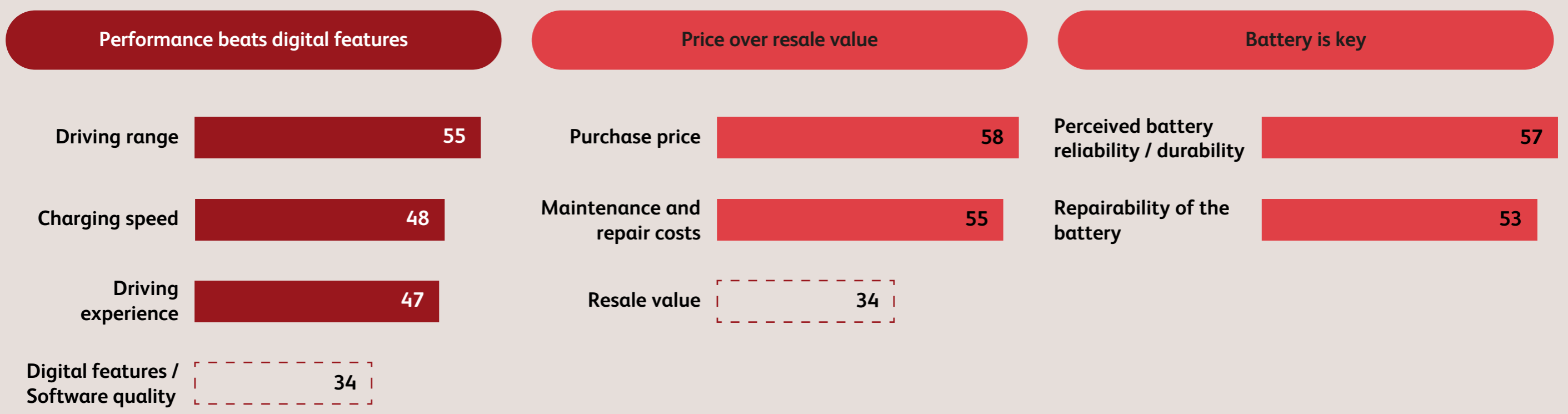
	BYD dominates the home market	Three-way race without a clear winner	Open market with narrow gaps	Tata and Hyundai are engaged in a head-to-head race	Tesla is losing ground in its home market
	China	Germany	UK	India	USA
1	BYD 41,5%	VW 31,0%	Ford 31,1%	Tata 49,2%	Toyota 42,0%
2	Tesla 22,4%	Audi 29,3%	Kia 24,0%	Hyundai 48,1%	Honda 35,3%
3	Xiaomi 20,6%	BMW 28,2%	VW 23,9%	Mahindra 41,2%	Chevrolet 30,0%

### Top 3 considered brands by private consumers for used battery electric vehicles

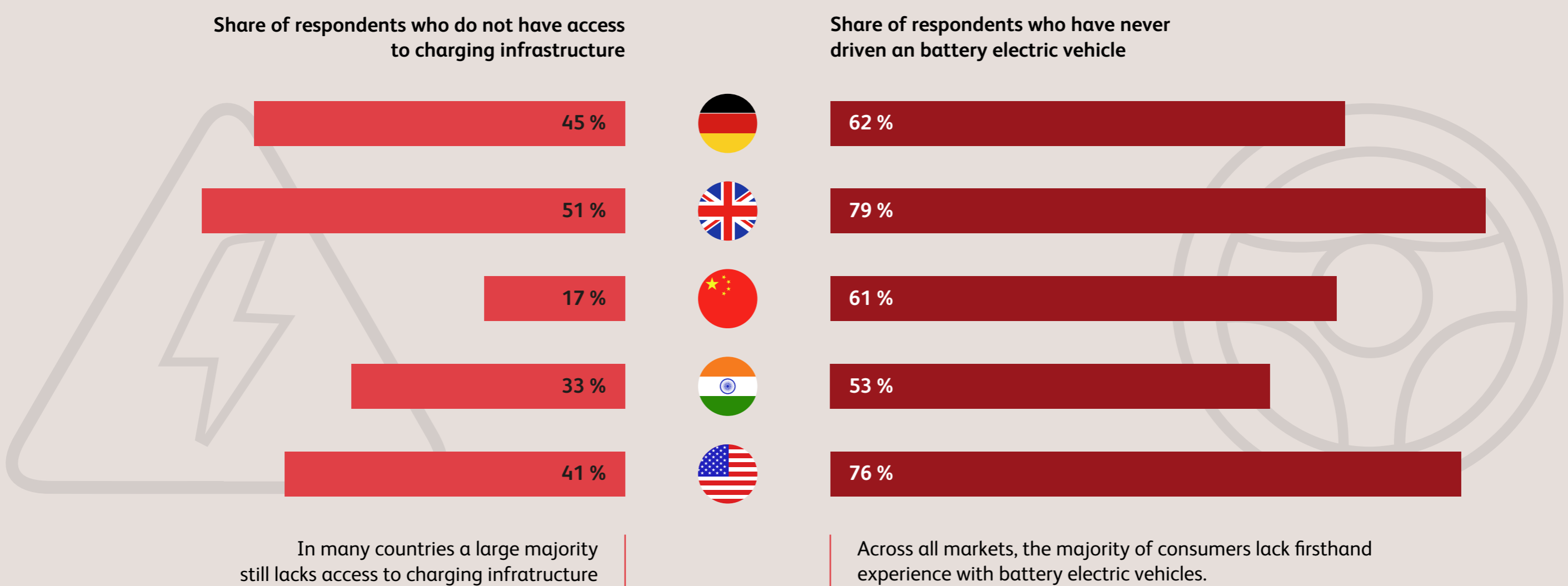
	BYD also dominates the used car market	Premium manufacturers are nearly on par	Ford defends its leading position	Hyundai takes the lead in the used car market	Toyota also remains number one in used cars
	China	Germany	UK	India	USA
1	BYD 38,5%	Audi 30,7%	Ford 31,4%	Hyundai 48,4%	Toyota 39,0%
2	Tesla 26,2%	BMW 29,9%	Hyundai 24,8%	Tata 42,8%	Honda 35,5%
3	Geely 18,8%	VW 27,7%	Kia 24,7%	Kia 41,5%	Chevrolet 28,3%

### What really drives purchase decisions

Percentage of very important factors across 5 markets for new battery electric vehicle

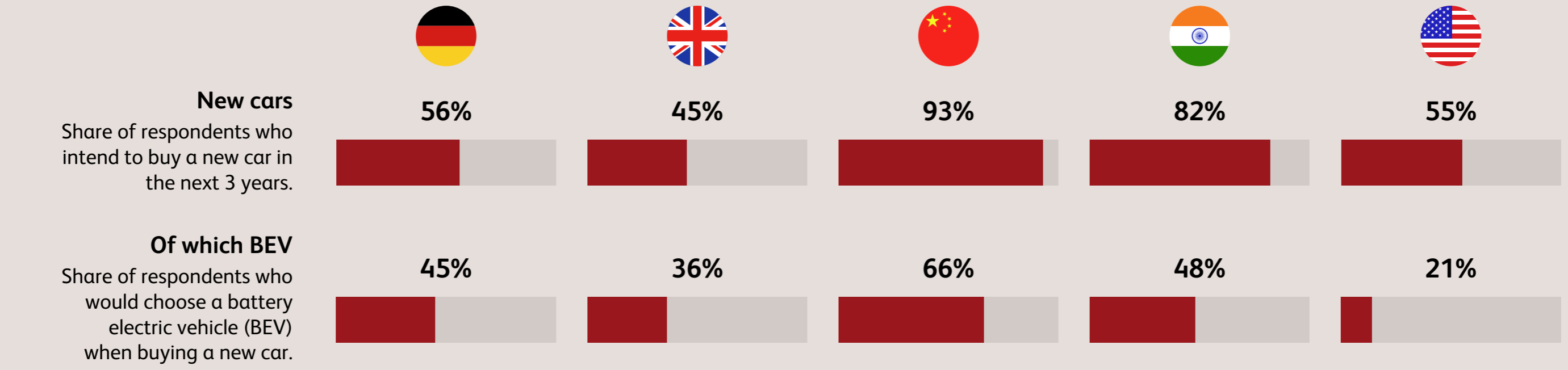


### Low experience and limited infrastructure still hold markets back



### From interest to purchase decision: How mature is the electromobility market?

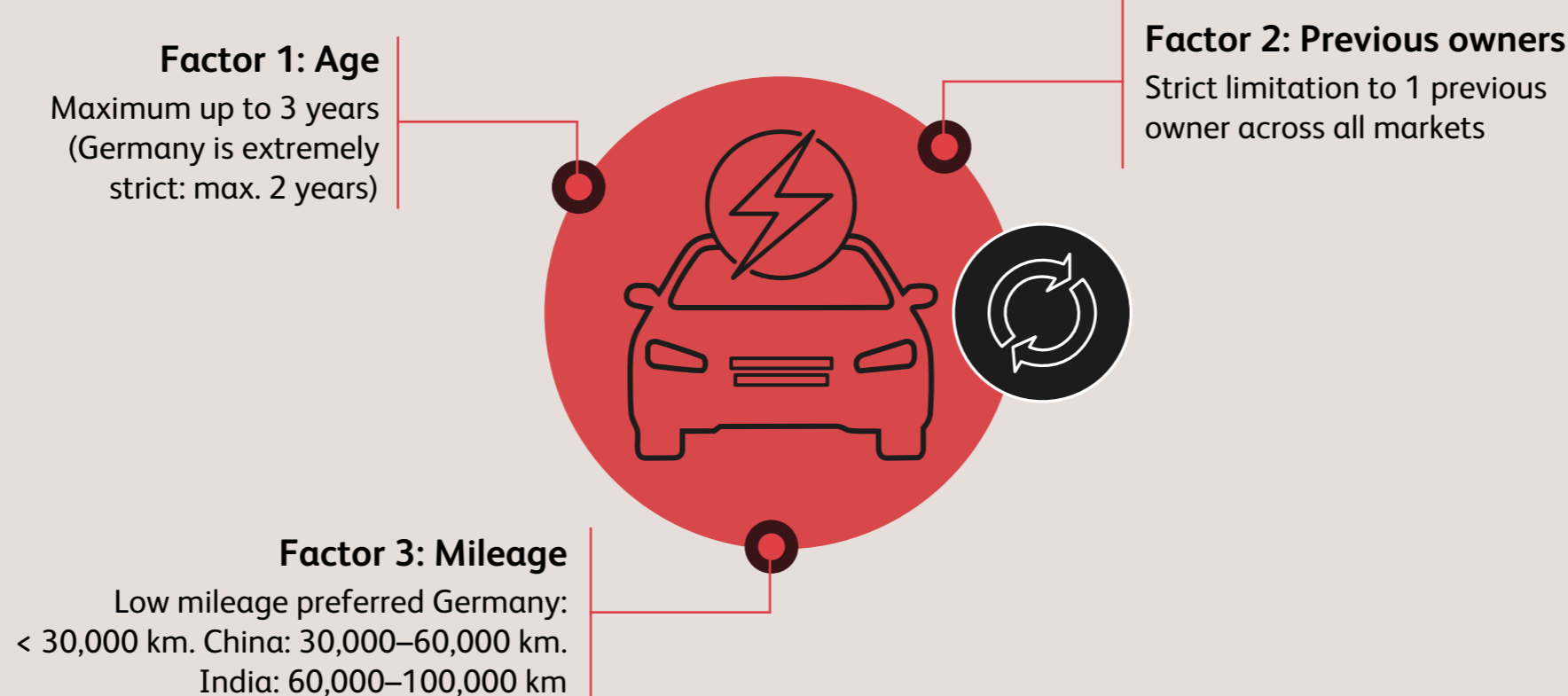
Which powertrain wins when the purchase decision becomes concrete?



- China leads clearly with both the highest new-car share and the strongest BEV penetration
- Purchase intention for new cars is lower in Germany but with a strong BEV share
- Demand for new cars is in India very high strong BEV share
- UK & US lag behind, with comparatively low BEV purchase intention

### Used battery electric vehicles: Customers are highly selective

Strict customer acceptance criteria for used battery electric vehicles



Customers set tight boundaries for used electric vehicles: concerns about battery degradation and technological aging are narrowing the market to young, low-mileage vehicles.

### Study basis and methodology at a glance

The BearingPoint Electromobility Attractiveness Index 2026 is based on an international online survey of 10,020 drivers and potential car buyers in Germany (n = 2,001), the United Kingdom (n = 2,002), the United States (n = 2,000), China (n = 2,014), and India (n = 2,003). The survey was conducted between 22 January and 27 March 2026. Due to the online survey methodology, the survey in India and China primarily focuses on the urban population. The samples in each country were quota-based by age, gender, and region, and subsequently weighted to ensure a representative and internationally comparable view of the target groups surveyed.