

AlixPartners

berylls
by AlixPartners

CONFIGURED: WHAT WILL CAR BUYERS DRIVE NEXT?

UNDERSTANDING LOCAL CONSUMER DESIRES

Preview of key findings

APRIL 2026

What does your perfect car look like? ABOUT THE GLOBAL CONSUMER SURVEY

RESPONDENTS BY COUNTRY



8,000
participants



11
countries



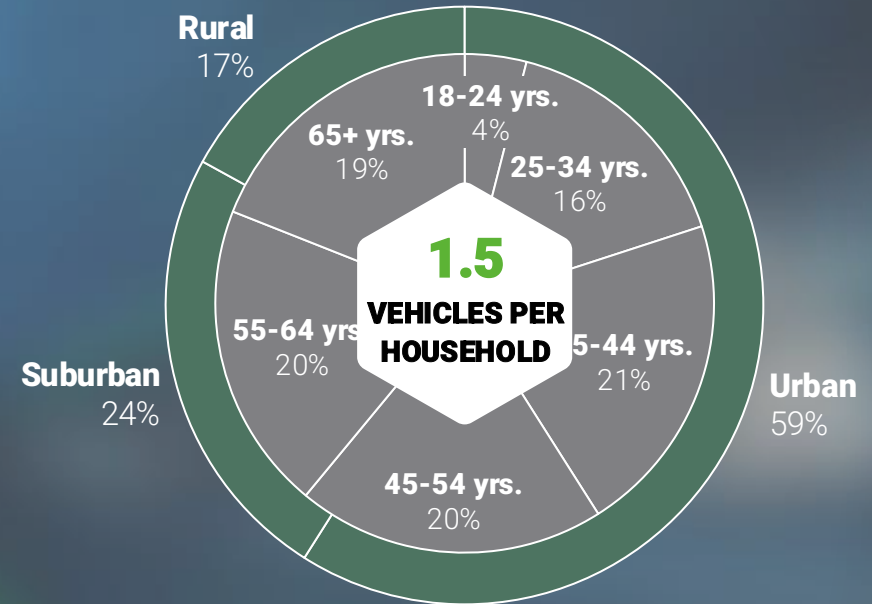
Current vehicle owners¹
Future vehicle purchasers²

EU5 markets³

USA, China, South Korea,
Japan, UAE, Saudi Arabia



AGE GROUP AND AREA OF RESIDENCE



2025 LIGHT VEHICLE SALES IN SURVEYED COUNTRIES in mn units



¹ Purchased or leased a vehicle in the past 3-5 years; ² Intended to purchase or lease a vehicle within the next 2 years; ³ Germany, the UK, France, Spain, Italy
Source: Berylls by AlixPartners, S&P Global Light Vehicle Sales (January 2026; incl. PC and LCV)

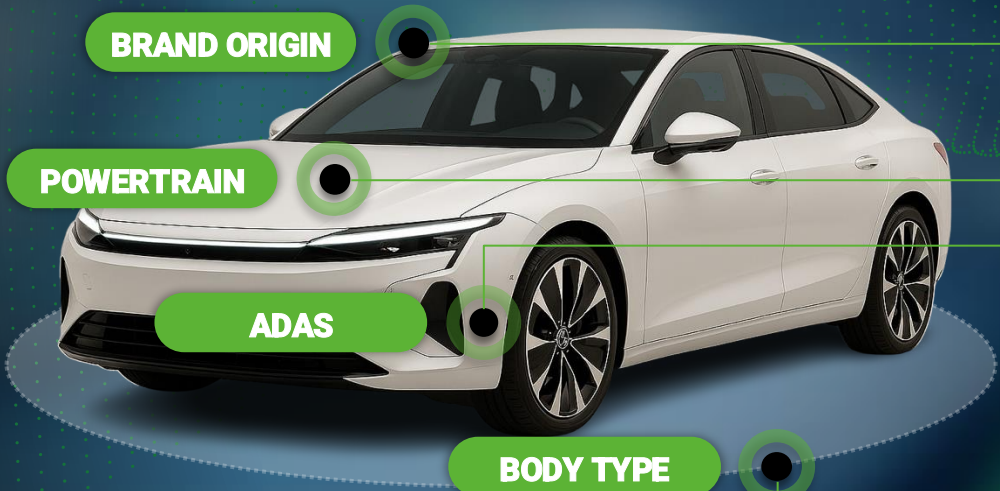
XX Number of survey respondents

What does your perfect car look like? EXTERIOR CONFIGURATION

OUR KEY FINDINGS



360°



BRAND ORIGIN

POWERTRAIN

ADAS

BODY TYPE

"MADE IN GERMANY" REMAINS A STRONG ASSET

- **'Made in Germany' is still the world's most trusted promise:** German brands face lowest avoidance (12%) and highest perceived quality (80%) – especially among Chinese respondents (90%)
- **It's not all great news:** Chinese consumers younger than 35 years and current drivers of a German BEV are more likely to avoid German brands

- Germany
- US
- China
- Japan
- South Korea

REEV ARE A RELEVANT ALTERNATIVE TO BEV

- **REEVs are pathing the way to full electrification:** To 45% of all respondents and 71% of Chinese respondents, REEV are a relevant alternative to BEV – attractiveness is yet to translate to purchasing intent
- **ICE drivers are not willing to pay a premium for BEV:** 49% of ICE drivers would consider a comparable BEV only if it was cheaper than an ICE car

- ICE
- HEV
- PHEV
- REEV
- BEV

ADAS IS A REGIONAL "IN OR OUT" GAME

- **L1 is sufficient to majority of consumers:** 42% of respondents prefer SAE L1 for their next vehicle while only 10% would opt for L4/L5
- **AD means improved quality of life to Chinese:** Chinese with highest L4/L5 affinity (24% vs 6% in DE and the US) – stress reduction and freeing up time as perceived benefit

- L0
- L1
- L2/L3
- L4/L5

SUVS ARE THE NEW "WELTAUTO"

- **SUVs dominate globally,** especially in South Korea, where 52% prefer SUVs, followed by the UAE (38%) and China (38%)
- **Big budget – big car:** the higher a respondent's budget for their next vehicle, the more likely they are to opt for an SUV

- Hatch
- Pickup
- Sedan
- Estate
- SUV
- Crossover
- Coupe / Convertible



What does your perfect car look like? INTERIOR CONFIGURATION

OUR KEY FINDINGS



360



VEHICLE INTERACTION

MATERIAL QUALITY

SUBSCRIPTIONS

MORE TOUCHSCREENS ARE NOT THE SOLUTION

- **Consumers desire freedom of choice when interacting with their vehicle:** Only 20% of respondents prefer purely touchscreen-based controls – in China as little as 13%; a balanced mix of touchscreens and physical knobs is favored by respondents (33%) across all markets and all vehicle price classes

OVER-INDEXING ON COST CUTTING WILL ERODE DEMAND

- **Fit & finish matters to Chinese car buyers:** Chinese consumers place above-average emphasis on material quality, fit & finish, color options and overall vehicle design – premium attributes likely represent a “right to play” in China rather than a true differentiator
- **Quality perceptions are even more relevant for BEV than ICE intenders:** Relative to ICE intenders, BEV intenders consistently show higher importance ratings across all material and design attributes

SUBSCRIPTIONS ARE HARD TO SELL

- **Consumers do not see any added value in subscriptions:** To 63% of respondents, the availability of unlockable vehicle features has no impact on or even (significantly) decreases interest in a specific vehicle
- **Subscriptions may not constitute a reliable revenue stream** – especially in Western markets, where 22% (Germany) to 28% (France) are not willing to pay any subscription fee at all



Touchscreens only

Physical controls only

Voice assistant

Steering wheel

Touchscreen & button mix



Material quality

Fit & finish

Color options

Vehicle design



ADAS

Comfort & Design

Performance

Connectivity



What does your perfect car look like? “SO WHAT” FOR OEMS AND SUPPLIERS



EXTERIOR



INTERIOR

OEMs

BRAND ORIGIN

Ensure **BEV execution** fully **delivers on brand origin** promises, especially where trust and repurchase intent are at risk

POWERTRAIN

Use **REEV as a transitional powertrain** to drive electrification in markets with low BEV WTP¹ or infrastr. constraints

ADAS

Localize ADAS strategies, standardizing **L1/L2(+)** globally while advancing **China-specific & global L4/L5** offerings

BODY TYPE

Prioritize SUVs as the global core portfolio, and **close BEV body type gaps** to avoid forced customer compromises

VEHICLE INTERACTION

Design vehicle interaction around usability, ensuring a **balanced mix of physical controls and touchscreens**

MATERIAL QUALITY

Ensure **value-proposition-specific interior quality**, fit & finish, and design – especially for BEVs and in China

SUBSCRIPTIONS

Limit subscription offerings to clearly **value adding features**, avoiding over reliance on “unlockables” as a revenue lever

SUPPLIERS

Demonstrate measurable reliability, quality and service, supporting OEM brand trust and country of origin positioning

Support OEMs with flexible, multi powertrain portfolios, reflecting ongoing relevance of ICE, REEV and BEV in parallel

Develop modular, region-specific and scalable ADAS stacks

Align product roadmaps and capacity planning w/ SUV-heavy demand across volume & premium segments

Focus cockpit innovation on usability and quality, rather than increasing screen size or count

Deliver cost efficiency w/o sacrificing perceived quality, as BEV customers place higher emphasis on fit & finish

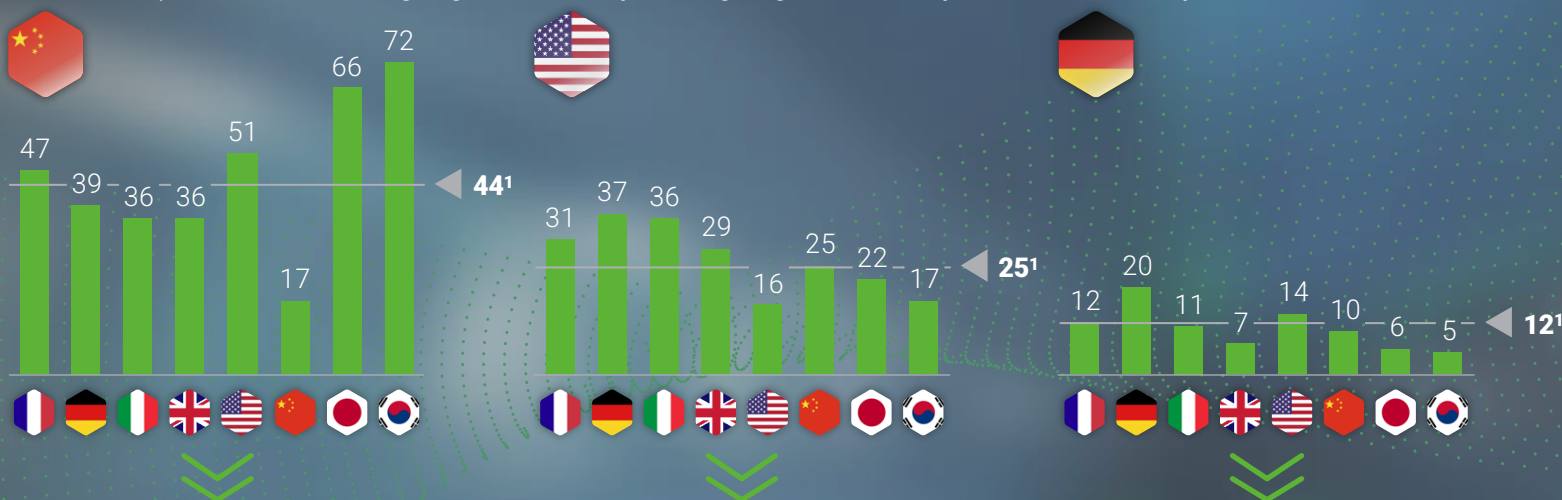
Regardless of OEM subscription models, explore new **HW or SW “as-a-service” offerings** for OEMs



Deep Dive: "MADE IN GERMANY" REMAINS A STRONG ASSET

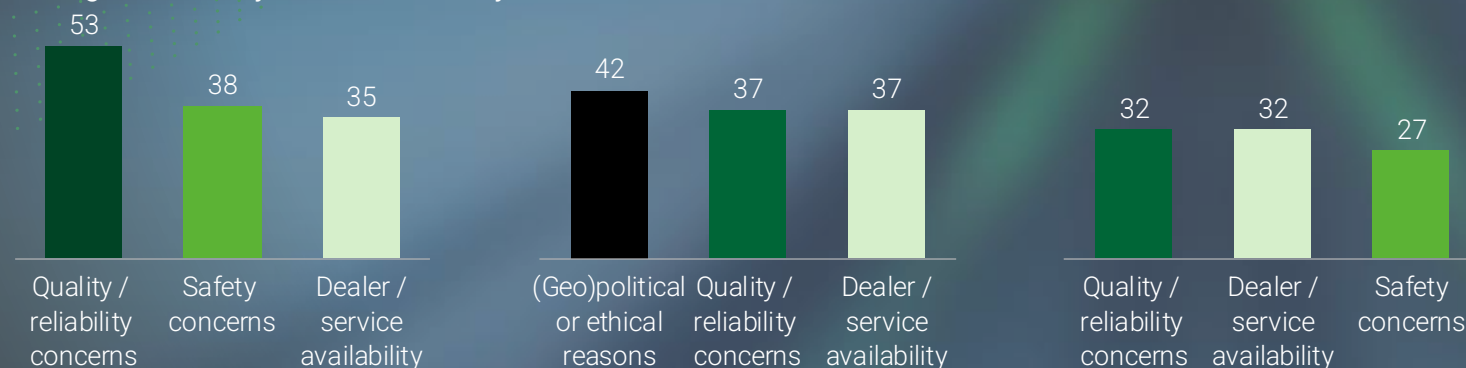
COUNTRIES OF ORIGIN AVOIDED BY RESPONDENTS

in % of respondents avoiding a given country of origin, global and by selected country



TOP 3 REASONS FOR AVOIDING A GIVEN COUNTRY OF ORIGIN

in %, global and by selected country¹



KEY FINDINGS

- **'Made in Germany' is still the world's most trusted promise:** German brands show lowest avoidance (12%) and highest perceived quality globally (80%) – while 44% avoid Chinese brands citing quality, safety, and dealer network coverage concerns
- **It's not all great news:** Chinese consumers younger than 35 yrs. are more likely to avoid German brands
- **German BEVs fail to deliver on brand promise:** 23% of German BEV drivers would not repurchase – nearly double the rate of Chinese BEV drivers (13%)
- **Country of origin relevance splits East vs. West:** Chinese (70%) and UAE (63%) respondents willing to pay premiums for trusted brand origin (China: 37% willing to pay 11-25% more; UAE/KSA: 49% pay >25%), compared to 32% in Germany and 25% in the US

IMPLICATIONS

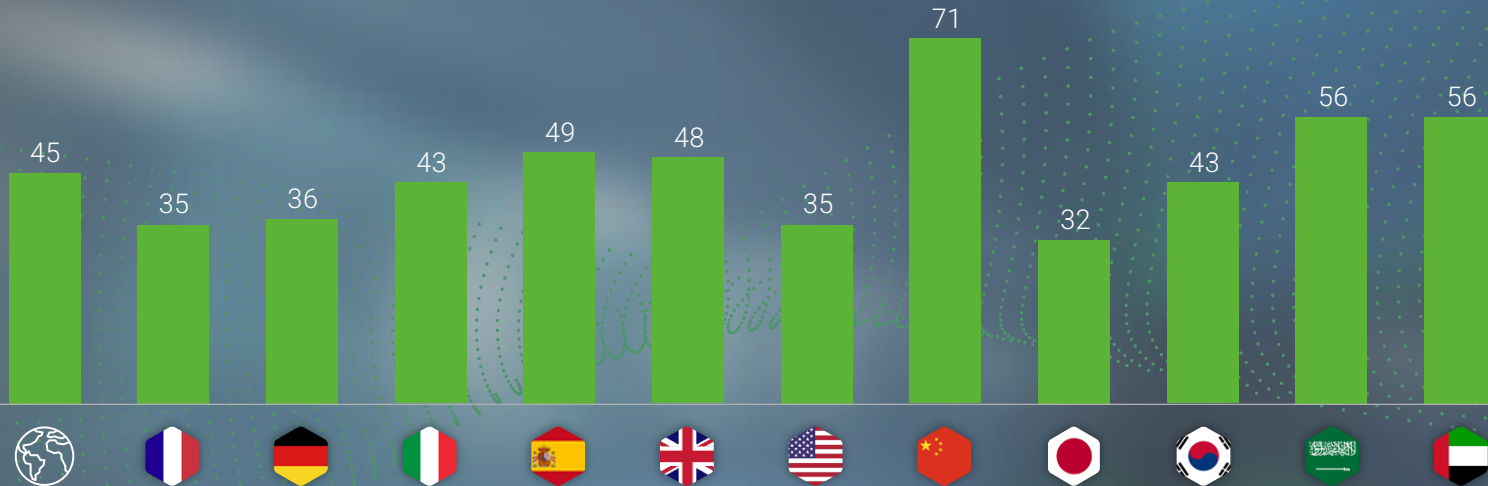
- **Legacy premium OEMs:** Return to high interior quality standards for BEVs to uphold "Made in Germany" status
- **Chinese OEMs:** Emphasize actual quality in marketing to counter negative perception. Position satisfied BEV customers as multipliers

Deep Dive: REEV ARE A RELEVANT ALTERNATIVE TO BEV



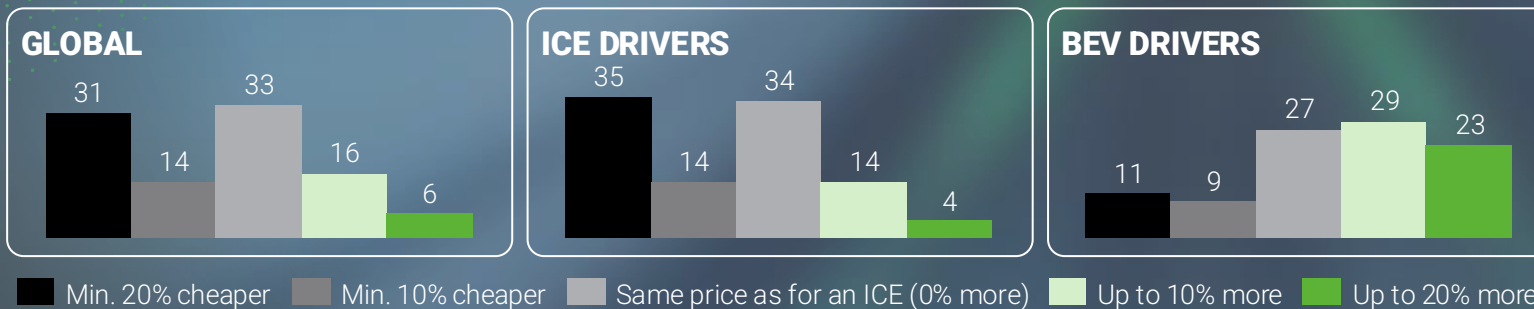
PERCEIVED EFFECTIVENESS OF REEVs IN ADDRESSING BEV CONCERNS

in % of respondents indicating "somewhat likely" or "very likely", global and by country



WILLINGNESS TO PAY FOR BEV VS. COMPARABLE ICE VEHICLES

in %, global and by selected country



KEY FINDINGS

- **REEV are pathing the way to full electrification:** To 45% of all respondents and 71% of Chinese (likely due to higher REEV familiarity) respondents, REEV are a relevant alternative to BEV – however, attractiveness yet to translate to purchasing intent
- **ICE drivers are not willing to pay a premium for BEV:** 49% of ICE drivers would consider a comparable BEV only if it was cheaper than an ICE
- **Price is a BEV barrier, except in China:** In line with local "price wars", 8% of Chinese respondents cite vehicle price as a BEV barrier (global: 37%, US: 46%)
- **Range expectations divide East and West:** 34% of Chinese respondents expect min. 750 km BEV range (Germany: 20%, US: 12%); to cover ≥50% of demand across all budgets, 450-550 km range is required

IMPLICATIONS

- **Premium OEMs:** Leverage REEVs as a transitional technology to bridge toward BEV adoption while maintaining margins – consider consumer driving behavior when validating (technical) REEV feasibility for a given market
- **Volume OEMs:** Deploy REEV selectively in markets/segments with low BEV WTP¹ or infrastructure gaps

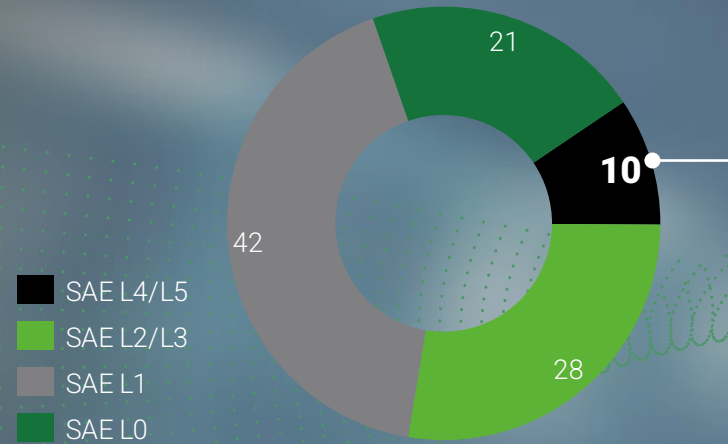
n = 8,000, single choice; Questions: Would a REEV address your main concerns about electric vehicles? / How much more (or less) would you be willing to pay for a BEV compared to a traditional ICE car of similar size and features? (single choice) Source: Berylls by AlixPartners analysis; 1 Willingness to pay

Deep Dive: ADAS IS A REGIONAL “IN OR OUT” GAME



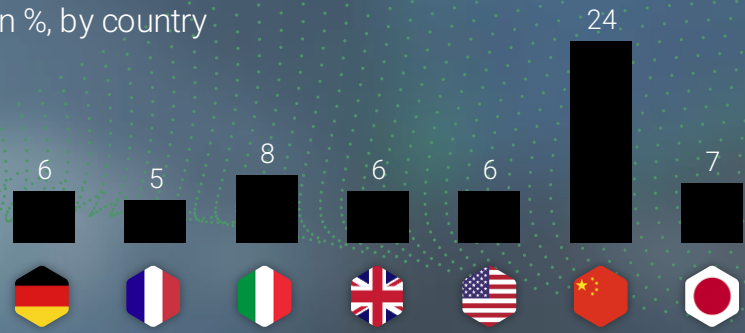
PREFERRED LEVEL OF AUTOMATION

in %, global and by country



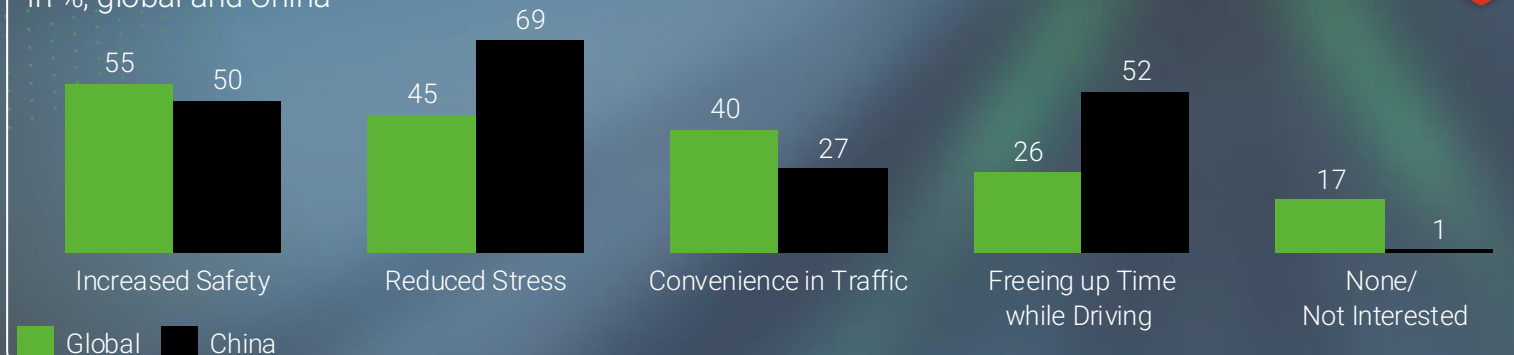
SAE L4/L5 AS PREFERRED LEVEL OF AUTOMATION

in %, by country



BENEFITS OF AUTOMATED DRIVING

in %, global and China



KEY FINDINGS

- **L1 is sufficient to a majority of consumers:** 42% of respondents prefer SAE L1 for their next vehicle
- **China with higher autonomous driving interest than Western countries:** 24% of respondents in China expect L4/L5 capabilities in their next vehicle – four times the rate in Germany & the US (6% each); strong Chinese consumer interest aligns with rapid ADAS deployment, enabled by supportive regulation
- **Chinese consumers associate automation with comfort, not safety:** Reduced stress (69%, +24pp vs. global avg.) and time savings while driving (52%, +26pp) are the dominant perceived benefits – a fundamentally different value proposition than in Western markets, where safety is the main perceived benefit

IMPLICATIONS

- **Premium OEMs:** Continue L2/L3 globally; focus on developing L4/L5 (e.g., via partnering approach) to maintain product relevance; China as potential pilot market – however, risk of limited global scalability due to regulatory landscape
- **Volume OEMs:** Standardize L1/L2 globally; limit further investments to maintain value proposition

n = 8,000, single choice; Question: What level of driving automation would you prefer in your next vehicle? (single choice) / What are the top 2 benefits of automated driving that are most important to you? (multiple choice)

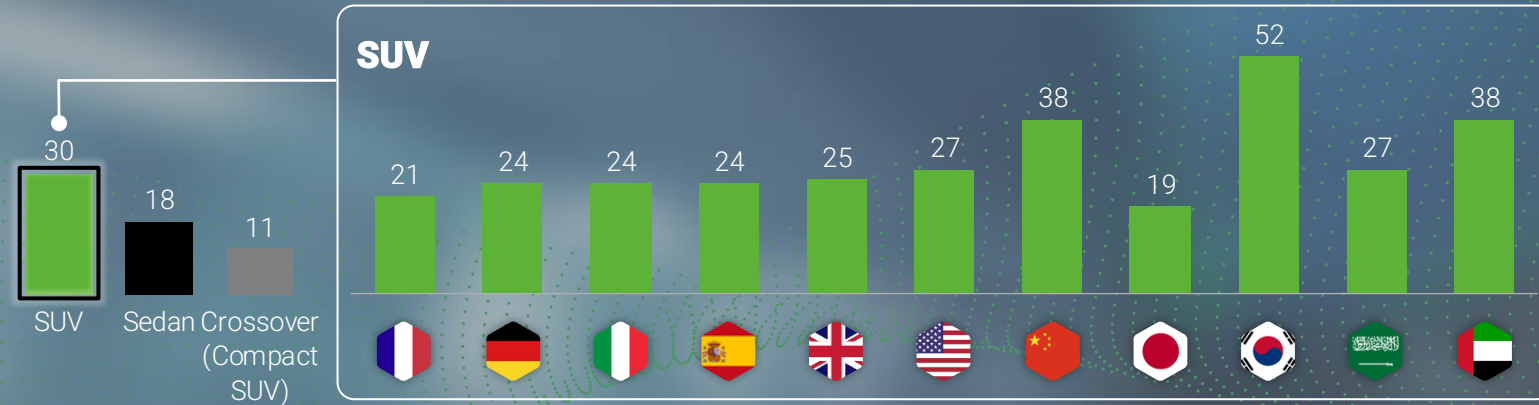
Source: Berylls by AlixPartners analysis

Deep Dive: SUVs ARE THE NEW “WELTAUTO”



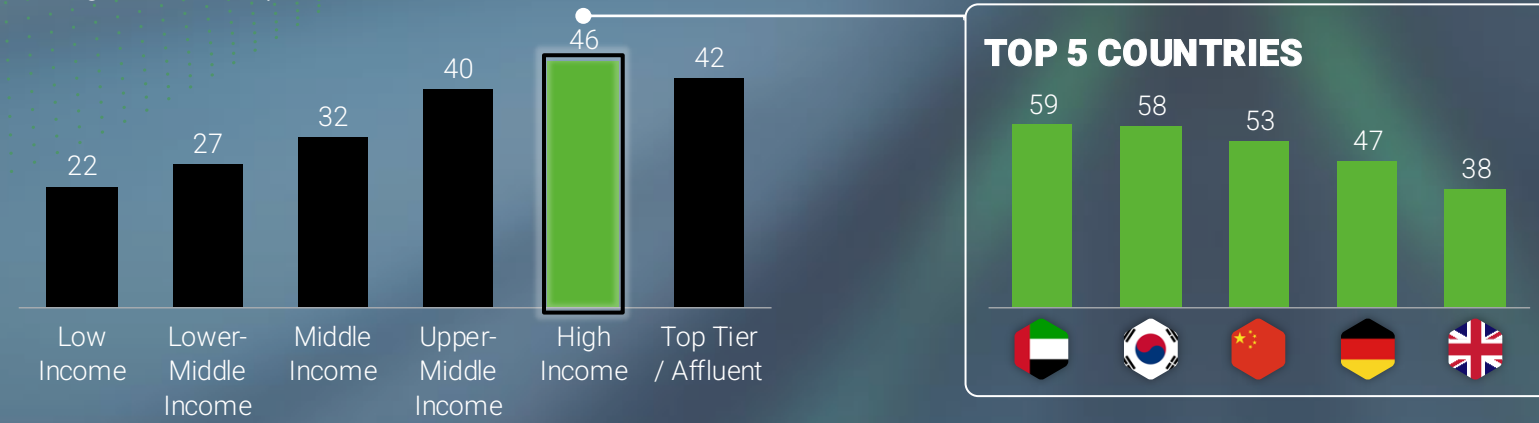
TOP 3 BODY TYPES

in %, global and by country



SUV AFFINITY BY HOUSEHOLD INCOME¹

in %, global and top 5 countries



KEY FINDINGS

- **SUVs dominate globally**, especially in South Korea, where 52% prefer SUVs, followed by the UAE (38%) and China (38%)
- **SUV dominance rises with budget**: 30% of respondents prefer SUVs globally, peaking at 46% in the high-budget segment
- **Powertrain beats body type in China**: 42% of respondents compromised on their preferred body type due to limited availability of desired powertrains – a material portfolio gap, particularly in China
- **Comfort drives body type selection**: Driving comfort (38%) and interior space (32%) are key body type switching drivers to consumers

IMPLICATIONS

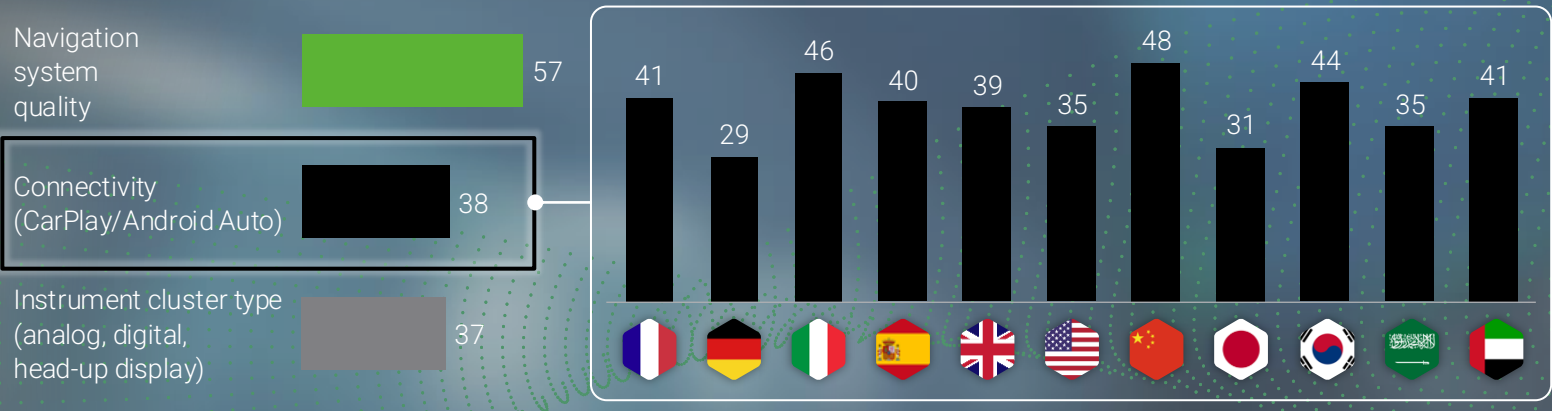
- **Volume & Premium OEMs**: Double-down on SUV offering as the “Weltauto” (world car) across all price points, especially in the premium segment
- **BEV portfolios**: Close BEV offering gaps in markets with heterogeneous body type preferences beyond SUVs (e.g., China and EU5 markets) to avoid loss of market shares



Deep Dive: MORE TOUCHSCREENS ARE NOT THE SOLUTION

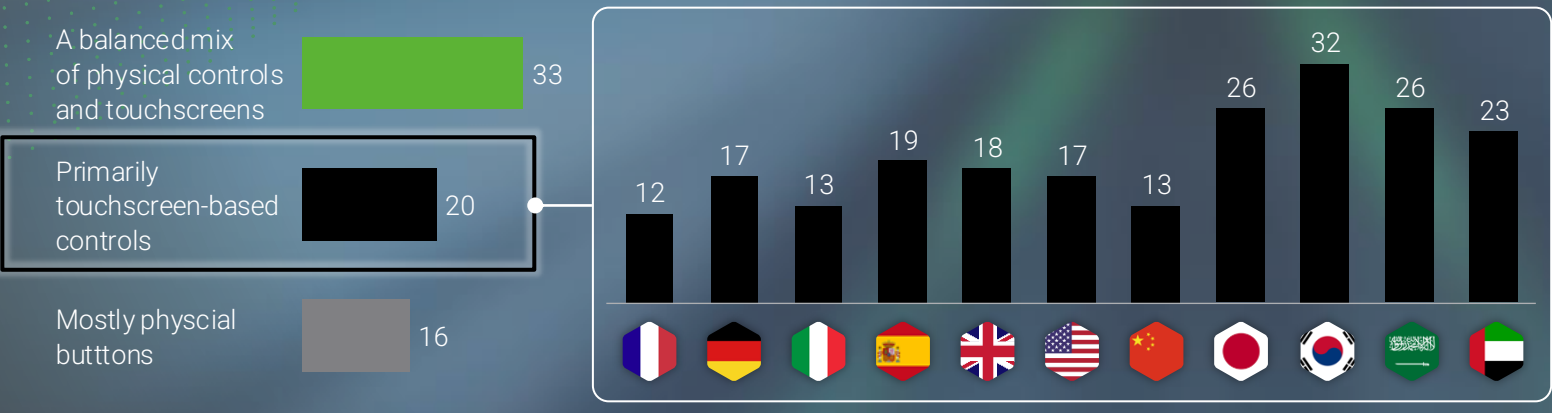
TOP 3 IMPORTANT INTERIOR TECHNOLOGIES

in %, global and by country



PREFERRED VEHICLE INTERACTION WHEN OPERATING IN-CAR FUNCTIONS

in %, global and by country



KEY FINDINGS

- **Touchscreen rush misses the mark:** Only 20% globally prefer purely touchscreen-based controls (China: as little as 13%); majority of respondents (33%) favor a balanced mix of physical controls and touchscreens across all markets and price segments
- **Navigation systems remain the key interior technology use case:** Quality navigation systems remain globally the most important interior technology to respondents (57%), followed by popular connectivity offerings such as Apple CarPlay and AndroidAuto (38%)

IMPLICATIONS

- **Volume OEMs:** Conduct review of (very) selected functions to be reintroduced as physical controls while prioritizing low-cost value proposition
- **Premium OEMs:** Dial back touchscreen-first approach and maintain physical controls for most common functions (volume, climate, etc.); focus on navigation system quality as (BEV) differentiator

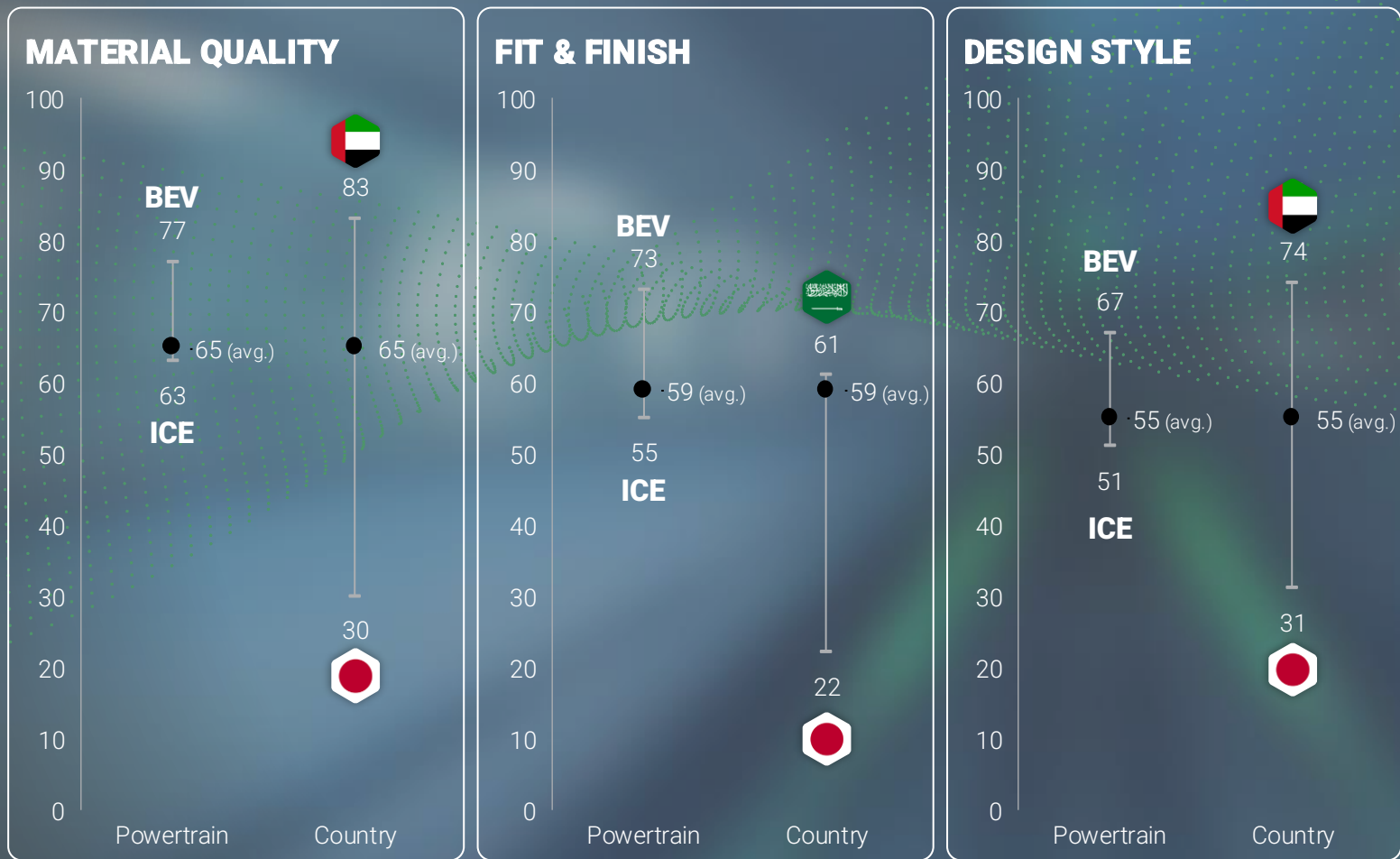
n = 8,000; multiple choice; Question: Which type of vehicle interaction do you prefer when operating in-car functions? (single choice) / What are the most important interior technology features to you?

Source: Berylls by AlixPartners analysis

Deep Dive: OVER-INDEXING ON COST CUTTING WILL ERODE DEMAND

IMPORTANCE OF MATERIAL QUALITY, FIT & FINISH AND DESIGN STYLE

in %, by powertrain and country, respondents indicating “(very) important”



KEY FINDINGS

- Fit & finish matters globally, not just in Germany:** Material quality (65%), fit & finish (59%), overall design (55%), and color options (42%) are the top-rated attributes globally
- Chinese consumers place above-average emphasis on quality and design attributes:** “Very important” ratings exceed the global average for material quality (+6pp), fit & finish (+6pp), color options (+7pp), and overall design (+8pp) – matching or exceeding German preference levels
- BEV intenders demand premium execution:** Importance of high material quality increases from 63% (ICE) to 77% (BEV), while fit & finish rises from 55% to 73%.

IMPLICATIONS

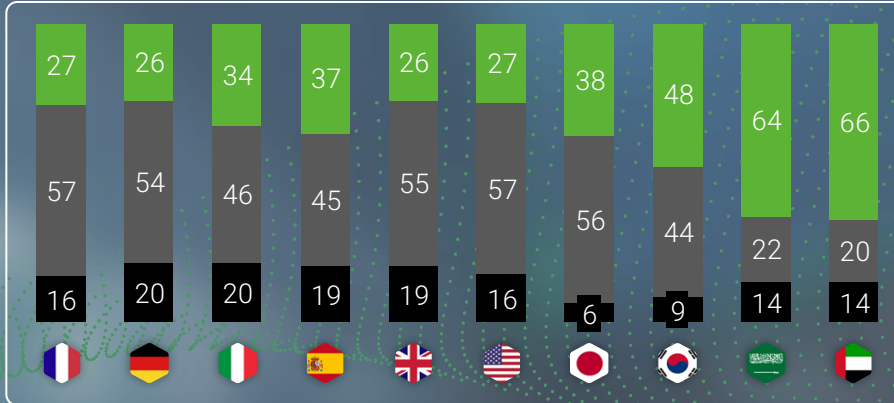
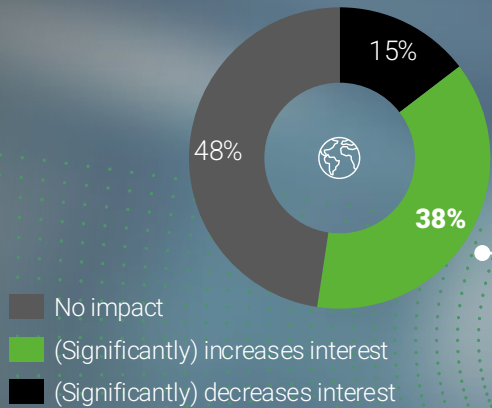
- Legacy premium OEMs:** Double down on (or return to) high interior quality to sustain robust value proposition & mitigate risk of disruption from lower-priced (new) players
- Volume OEMs:** Ensure consistent vehicle quality across all powertrains – quality dilution may alleviate cost pressure at risk of top-line headwinds

Deep Dive: SUBSCRIPTIONS ARE HARD TO SELL



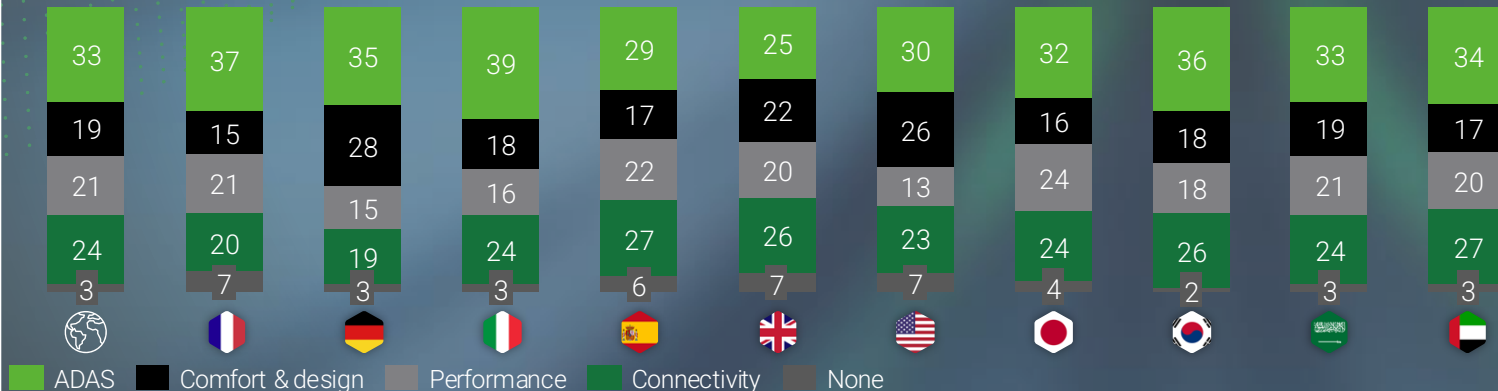
INFLUENCE OF UNLOCKABLE VEHICLE FEATURES ON VEHICLE INTEREST¹

in %, global and by country



INTEREST IN UNLOCKING ADDITIONAL FEATURES AFTER PURCHASE (CATEGORIZED)

in %, global and by country, respondents citing unlockable features "(significantly) increase" vehicle interest








KEY FINDINGS

- Consumers do not see any added value in subscriptions:** To 63% of respondents, availability of unlockable vehicle features has no impact on or (significantly) decreases interest in a specific vehicle
- BEV drivers less averse to unlockable features:** Neutral or negative perceptions of a vehicle offered with unlockable features are primarily driven by ICE drivers (62% vs. 38% among BEV drivers)
- Connected & intelligent features leading:** Among respondents stating that unlockable features "(significantly) increase" vehicle appeal, ADAS (33%) and connectivity (24%) rank highest – Germany and the US as an exception, where comfort & design features (e.g., heated seats) are preferred

IMPLICATIONS

- Legacy premium OEMs:** Avoid over-indexing on unlockable features; limit subscriptions to highly selective offering that are truly value-enhancing (e.g., ADAS) to preserve premium promise and mitigate the risk of losing ground to new (Chinese) premium players offering more complete packages

ANY QUESTIONS ON YOUR CONFIGURATION?

| | BRAND ORIGIN | POWER-TRAIN | ADAS | BODY TYPE | MATERIAL QUALITY | VEHICLE INTERACTION | SUB-SCRIPTIONS | SALES CHANNELS | FINANCING TYPES |
|---------------------|--------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|------------------|-------------------------------------------------------------------------------------|----------------|----------------|-------------------------------------------------------------------------------------|
| COUNTRIES | | |  | | | | | | |
| CUSTOMER SEGMENTS | | | |  | | | | |  |
| DRIVETRAIN | | | | | |  | | | |
| VEHICLE PRICE CLASS | |  | | | | | | | |
| ... | | | | | | | | | |

LETS TALK – WE LOOK FORWARD TO DISCUSSING YOUR LOCAL CONFIGURATION WITH YOU IN PERSON!

INTERESTED IN EXPLORING YOUR LOCAL CONFIGURATION? **CONTACT US!**

YOUR LOCAL CONTACT

JONAS WAGNER

Partner & Managing Director

+49 179 766 8157

jonas.wagner@berylls.com



THE TEAM BEHIND THE GLOBAL CONSUMER STUDY



XING ZHOU

Partner & Managing Director

+49 172 8810 474

xzhou@alixpartners.com



WILLY WANG

Associate Partner

+49 175 1400 361

willy.wang@berylls.com



THERESA STÜTZ

Associate Partner

+49 171 312 3113

theresa.stuetz@berylls.com



HENNING LUDES

Associate Partner

+49 151 1591 5301

henning.ludes@berylls.com



SAMUEL SCHRAMM

Senior Consultant

+49 175 842 3890

samuel.schramm@berylls.com



MORITZ PRAETZ

Consultant

+49 151 1553 9353

moritz.praetz@berylls.com

AlixPartners | berylls
by AlixPartners