# INDIA MOBILITY REPORT 2026

May 2026

As we analyse the findings of the **Ipsos Mobility Report 2026,** it is clear that India is not merely following global trends; it is carving out a distinct, high-growth trajectory that balances economic pragmatism with a surprisingly deep-seated environmental consciousness. Our 31-country survey reveals a market defined by "productive contradictions" – where public transport is a preference rather than a last resort, and where digital trust far outpaces developed markets.

## 1. The Dominance of the Multi-Modal Ecosystem

Unlike the car-centric models of the United States (64% car dependency) or Australia (61%), India's mobility is built on a foundation of public and shared transport. Public transport leads with a **24% share of daily choices,** supported by a robust ecosystem where motorcycles and walking each capture 18%. This 60% combined preference for non-car options isn't just about infrastructure gaps; it's about a **positive shift in sentiment.**

With 65% of Indians rating public transport as affordable—drastically higher than in European markets like the Netherlands (29%)—and 22% stating they actively enjoy their commute, we are seeing the results of significant investment in "metro-fication" and electrified bus fleets. As we often observe, motorcycles act as the critical "connective tissue" in this landscape, providing essential last-mile connectivity that larger systems cannot.

**60%**
of daily travel choices are non-car options

**65%**
of Indians say public transport is affordable

## 2. The Environmental and Economic Pulse

An impressive **62% of Indians prioritise public transport**, nearly double the sentiment found in Canada or the US. While the choice of public transport might be more economic and practical for urban Indians, this also has a positive environmental and wellness impact, with 65% of respondents saying they use walking or cycling specifically to stay active.

However, the industry must remain sensitive to the **affordability strain.** 61% of Indian households report that transport costs impact their budgets, compared to a global average of 44%. This economic pressure, while reinforcing public transport usage, creates a high barrier to entry for personal vehicles, even as the aspirational value of car ownership remains potent for the 46% who desire a vehicle even when it isn't essential.

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## 3. Nationalism vs. The "Domestic Avoidance" Gap

One of our most striking findings is the **"Boycott Paradox."** Despite a global rise in "automotive nationalism," 39% of Indians say they are willing to avoid domestic brands. This suggests a persistent gap in quality perception that Indian OEMs like Maruti Suzuki, Tata, and Mahindra are currently racing to close through technological leapfrogging. Interestingly, while geopolitical tensions exist, resistance to Chinese brands (31%) remains lower than the global average (41%), and Japanese brands continue to enjoy a near-unassailable trust deficit of only 7% avoidance.

**39%**
of Indians are willing to avoid domestic car brands

**Only 7%**
of Indians avoid Japanese car brands

## 4. The Digital Leap: EVs and Autonomous Trust

India is following China's lead in rapid EV transformation. With **63% of consumers intending to adopt an EV within five years,** the appetite is there, provided the government can address the 56% who believe current policy efforts are insufficient.

Perhaps most surprising for global observers is India's **technological fearlessness.**

At 47%, Indians feel safer in self-driving cars than their counterparts in most developed nations. Furthermore, 62% trust automakers with their personal data—a "social license to operate" that is non-existent in markets like France (19%) or Japan (25%). This trust is a fundamental asset that will accelerate the integration of AI and software-defined vehicles in the Indian market.

**63%**
of Indian consumers intend to adopt an EV within the next five years

**62%**
of Indians trust automakers with their personal data

## Strategic Framework: The India Mobility Value Quadrant

To assist in decision-making, we categorise the market through a lens of **Utility vs. Aspiration:**

### The Utility Workhorses (Public Transport & Motorcycles):

High efficiency and high sentiment. These modes represent the "daily driver" for 60% of the population.

### The Aspirational Gap (ICE Passenger Vehicles):

Low current usage (7%) but high emotional desire (46%). This remains a status symbol that faces high cost-of-ownership barriers.

### The Innovation Bridge (Electric Vehicles):

High intent (63%) but low current penetration (8.36%). Success here depends on overcoming policy scepticism and addressing infrastructure concerns.

### The Trusted Frontier (Autonomous & Connected Tech):

High technology acceptance (62% trust). India is uniquely positioned for the rapid adoption of AI-integrated mobility compared to "tech-fatigued" Western markets.

## Conclusion

# Future Mobility Trajectory: Navigating Contradictions

India's mobility landscape reveals a nation successfully balancing multiple contradictions: embracing public transport while aspiring to car ownership, expressing nationalist sentiment while preferring foreign brands, and maintaining price sensitivity while showing strong EV interest.

Successful automotive communication requires "combining brand value with relatable stories"—particularly relevant for Indian automakers seeking to overcome the 39% domestic avoidance rate. As Pandiaraj notes, "Indian automakers like Maruti Suzuki, Tata Motors, and Mahindra are introducing technologically advanced products tailored to local needs," potentially bridging the quality perception gap.

With India already the world's third-largest automobile market and projections of 500 million vehicles within 25 years, the nation's mobility choices carry global implications. The Ipsos Mobility Report 2026 reveals an India at the intersection of sustainability, technology, and nationalism—navigating these forces while maintaining pragmatic focus on affordable, accessible mobility solutions. As global fractures deepen and mobility becomes increasingly political, India's ability to balance these competing pressures while advancing sustainable transport may provide a model for other emerging markets facing similar transitions.

India is already the
**world's 3rd**
largest automobile market

**500 million**
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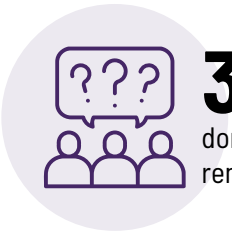

**39%**
domestic brand avoidance remains a key barrier

# Sector Perspectives:

# KEY QUESTIONS ANSWERED

## What is the 'Boycott Paradox' for Indian automakers?

The high rate of domestic brand avoidance in India is a critical phenomenon we call the **"Boycott Paradox."** While there is a visible rise in nationalist sentiment globally, our data shows that **39% of Indians would avoid domestic automotive brands** when making a purchase.

The reasons for this trend can be categorised into three strategic pillars:

- **The Quality Perception Gap:** The primary driver behind this 39% avoidance rate is a **persistent gap in how consumers perceive the quality and reliability** of homegrown vehicles compared to international stalwarts. For Indian OEMs, this remains the most significant hurdle to capturing the "nationalist" segment of the market.
- **The Gold Standard of Reliability:** To understand why domestic brands struggle, we must look at the competition; **Japanese brands enjoy a mere 7% avoidance rate,** a testament to a "decades-long reputation for reliability" that many Indian consumers still feel domestic players have yet to fully match. This suggests that for the Indian car buyer, **proven performance often outweighs nationalistic pride.**
- **A "Fractured Globalisation" Trend:** India's situation is part of a broader global shift where car choices are increasingly becoming political statements. Interestingly, India finds itself in a unique position where it is a major manufacturing hub facing international scepticism (38% global avoidance), while **its own domestic consumers continue to show a preference for foreign badges.**

**The Path Forward for Indian OEMs.** This mirrors the historical evolution of the Chinese market, where domestic brands only gained widespread acceptance after achieving **massive quality improvements and clear technological leadership,** particularly in the EV sector. We are already seeing the likes of **Maruti Suzuki, Tata Motors, and Mahindra** aggressively launching technologically advanced products tailored to local needs to specifically **bridge this quality perception gap** and regain the trust of the Indian consumer.

## Why do Indians feel safer in autonomous vehicles than Westerners?

The higher safety perception regarding autonomous vehicles (AVs) among Indians, compared to their Western counterparts, is rooted in a unique combination of **technological optimism** and a high level of **institutional trust** that is currently absent in many developed markets.

Based on our findings at Ipsos, here is why the Indian consumer is more "tech-ready" for the autonomous frontier:

- **Absence of "Tech Fatigue":** Unlike many Western nations experiencing a plateau in digital enthusiasm, India demonstrates a **remarkable openness to automotive innovation.** While 47% of Indians feel safe in self-driving cars—a figure significantly higher than in most developed nations—the broader global landscape is characterized by "tech fatigue". In India, **64% of consumers actually desire fully autonomous cars,** and 62% actively look forward to new vehicle technologies.
- **The Data Trust Advantage:** A critical barrier to AV adoption in the West is the fear of data misuse. In India, **62% of consumers trust automakers to protect their personal data.** This stands in stark contrast to developed markets like **France (19%) or Japan (25%),** where trust is minimal. This high degree of confidence provides what we call a **"social license to operate,"** allowing for a smoother integration of AI and software-defined vehicles.
- **Institutional Confidence:** Indian consumers show a balanced and relatively high trust in both **government (62%) and automakers (62%)** to handle the privacy and safety implications of new technology. This dual trust creates a competitive advantage over Western markets currently grappling with significant trust deficits in corporate and state oversight of AI.
- **Openness to Non-Traditional Players:** India is increasingly mirroring trends seen in China, where there is a high acceptance of **tech companies** entering the automotive space. With a 16% preference for tech-led vehicle brands and a general high technology acceptance, Indians view the entry of software giants into the mobility space as an enhancement to safety rather than a risk.

In essence, while Westerners view autonomous technology through a lens of scepticism and privacy concerns, **Indians view it as a pillar of the "dual transformation"**—where AI and software integration are seen as essential steps toward a more efficient and modern mobility future.

# How does India's EV intent compare to China's growth?

India's electric vehicle (EV) trajectory is positioned as **following China's lead,** mirroring the rapid transformation seen in the Chinese market over the last several years. While China remains the global benchmark for growth, India's current intent suggests a similarly aggressive, though slightly trailing, adoption curve.

The comparison between the two markets can be broken down into three key pillars:

## 1. Market Penetration and Growth Benchmarks

China has set an unprecedented pace, with New Energy Vehicle (NEV) penetration surging from **5% in 2019 to 53% by 2025.** India is currently at a foundational stage with an **8.36% penetration rate,** but it has established a clear roadmap to reach **30% by 2030.** This rapid ascent in China provides a blueprint for India's own "dual transformation" into a software-defined mobility hub.

## 2. Consumer Appeal and Adoption Intent

While Indian interest is high, there remains a gap compared to the depth of the Chinese market:

- **Five-Year Intent: 63% of Indian consumers** intend to adopt an EV within the next five years, compared to **73% in China.**
- **Overall Appeal:** EVs currently hold an appeal for **61% of Indians,** whereas they appeal to **67% of Chinese consumers,** who are often younger and more tech-savvy.
- **Policy Support:** Unlike some European markets facing policy backlash, both nations show strong support for government intervention. In India, **66% of consumers back reduced road user charges** to accelerate this transition.

## 3. The "Tech-First" Consumer Profile

India is beginning to follow China's unique trend of favoring technology companies over traditional automakers:

- **Brand Preference:** In China, **38% of consumers prefer buying vehicles from tech companies,** a shift India may soon replicate given its own **16% preference for tech-led brands** and overall high technology acceptance.
- **The Trust Asset:** Both markets share a massive advantage in digital trust that is non-existent in the West. **62% of Indians and 63% of Chinese consumers trust automakers with their personal data,** providing a critical "social license" to integrate the AI and connectivity features essential for modern EVs.

In summary, while India's current penetration reflects China's market from a few years ago, the **underlying consumer intent (63%) and high trust levels** suggest that India is primed for a similarly explosive growth phase as infrastructure and policy support catch up to consumer aspirations.

# How do age and tech-savviness affect Indian EV adoption intent?

In the Indian context, **tech-savviness and demographic shifts are the primary drivers of the nation's aggressive intent to adopt EVs.** While the market is currently at an 8.36% penetration level, the transition to a projected 30% by 2030 is underpinned by a consumer base that is uniquely "tech-ready" compared to global peers.

Based on the sources, here is how these factors intersect:

## Tech-Savviness as a Catalyst for Adoption

Indian consumers demonstrate what we call "consistent tech enthusiasm," which directly correlates with their willingness to shift to electric mobility.

- **Innovation Appetite:** 62% of Indians actively look forward to new vehicle technologies, and 64% express a desire for fully autonomous vehicles. This openness creates a fertile ground for new technologies, which are increasingly viewed as "software-defined vehicles" rather than just traditional transport.
- **The Intent-Appeal Gap:** While 40% of Indians find EVs broadly "appealing," a significantly higher **63% intend to adopt one within the next five years.** This suggests that for tech-savvy Indians, the functional and technological advantages of EVs outweigh general aesthetic or traditional appeal.
- **Brand Displacement:** Tech-savviness is also shifting brand loyalty. 16% of Indians already prefer buying vehicles from **tech companies rather than traditional automakers,** a trend that mirrors the tech-led disruption seen in China.

## The Role of Age and the "China Blueprint"

While the report highlights that India is "following China's lead," it uses the Chinese demographic profile as a benchmark for India's trajectory.

- **Demographic Drivers:** In China, the rapid surge in EV penetration (reaching 53% by 2025) has been heavily **supported by younger, tech-savvy car buyers.**
- **A Follower Trend:** The sources indicate that India is likely to follow this exact trend, as its own high technology acceptance and 16% preference for tech-led brands signal a market moving toward a **younger, digitally-native consumer base.**

## The Trust Factor: A Social License for Tech

A critical component of tech-savviness in India is **digital trust,** which is significantly higher than in Western markets.

- **Data Confidence:** 62% of Indians trust automakers to protect their personal data, a level of confidence that matches China (63%) but dwarfs markets like France (19%) or Japan (25%).
- **Safety Perceptions:** This trust extends to safety; **47% of Indians feel safe in self-driving cars,** a sentiment that positions the country favourably for the "dual transformation" of AI integration and electrification.

In summary, the Indian EV market is not just being driven by environmental concerns, but by a **demographic that views the vehicle as a tech product.** For carmakers, the mandate is clear: to capture the 63% intent, you must appeal to consumers who prize **technological leadership and data security** as much as the powertrain itself.

## Methodology:

These are the results of a 31-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, November 21 and Friday, December 5, 2025. For this survey, Ipsos interviewed a total of 23,722 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Belgium, Brazil, Canada, mainland China, France, Germany, Great Britain, Italy, Japan, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand, and Türkiye. The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, mainland China, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Türkiye are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

## How Can Ipsos Help?

Ipsos Mobility Report explores how mobility choices shape our societies—from access and inclusion to safety, liveability, and climate impact.

Around the world, mobility is both deeply personal and profoundly public: it determines who can reach jobs, schools, and care, how our streets feel, and whether we meet environmental goals.

There is much food for thought here. We look forward to discussing what this means for your business.

## For further details, get in touch:

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