



DAT REPORT 2026

**Selected Findings
from Seven Countries:
Austria, France, Italy,
Norway, Poland, Spain,
Germany**

The Norwegian report
was supported by:



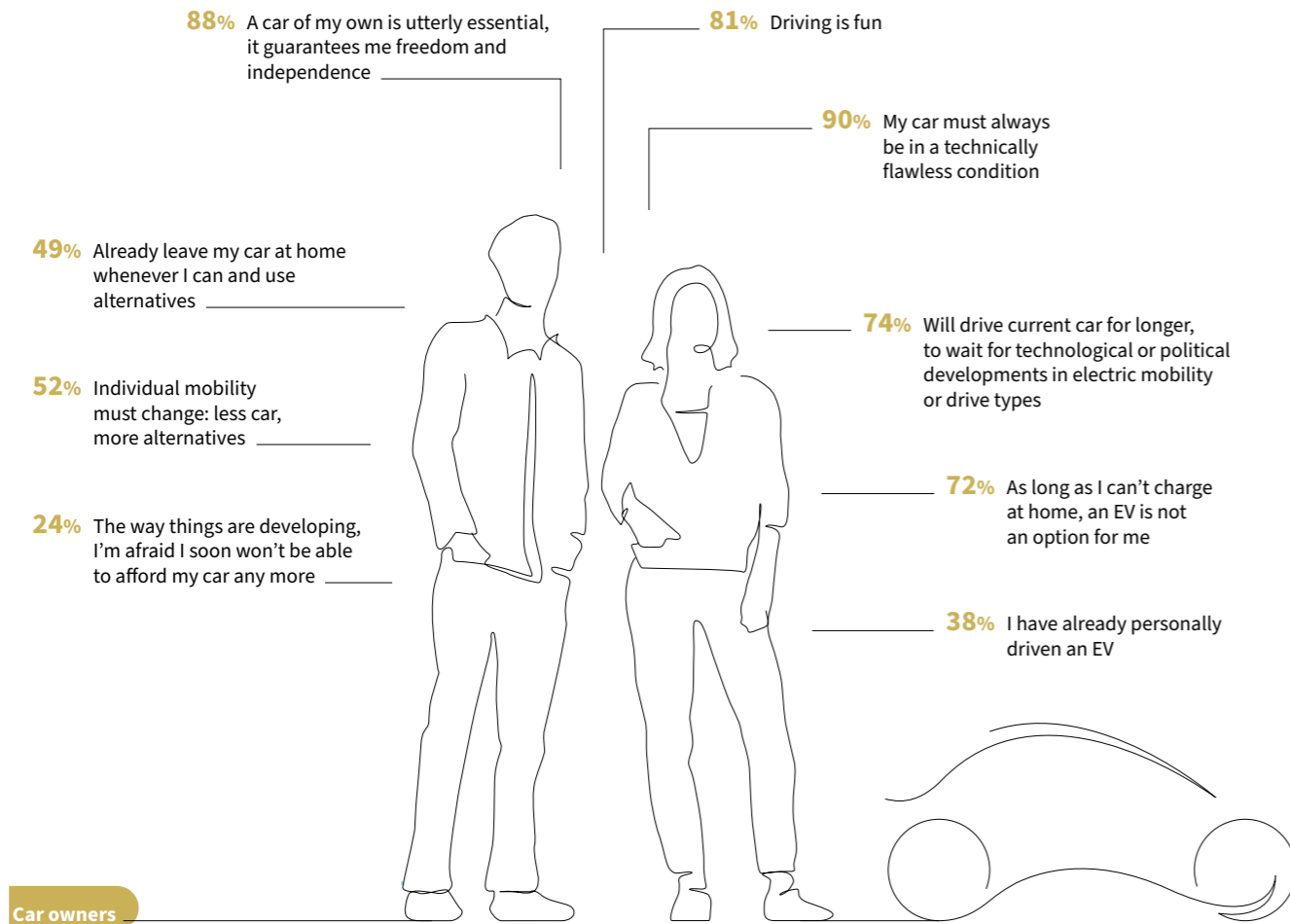
INTERNATIONAL VERSION



**Automotive excellence
starts with us.**



A2 The car owner and his relationship with the car 2025



Austria/Source: DAT

73%
Having a car is indispensable to me to ensure my mobility in day-to-day life.

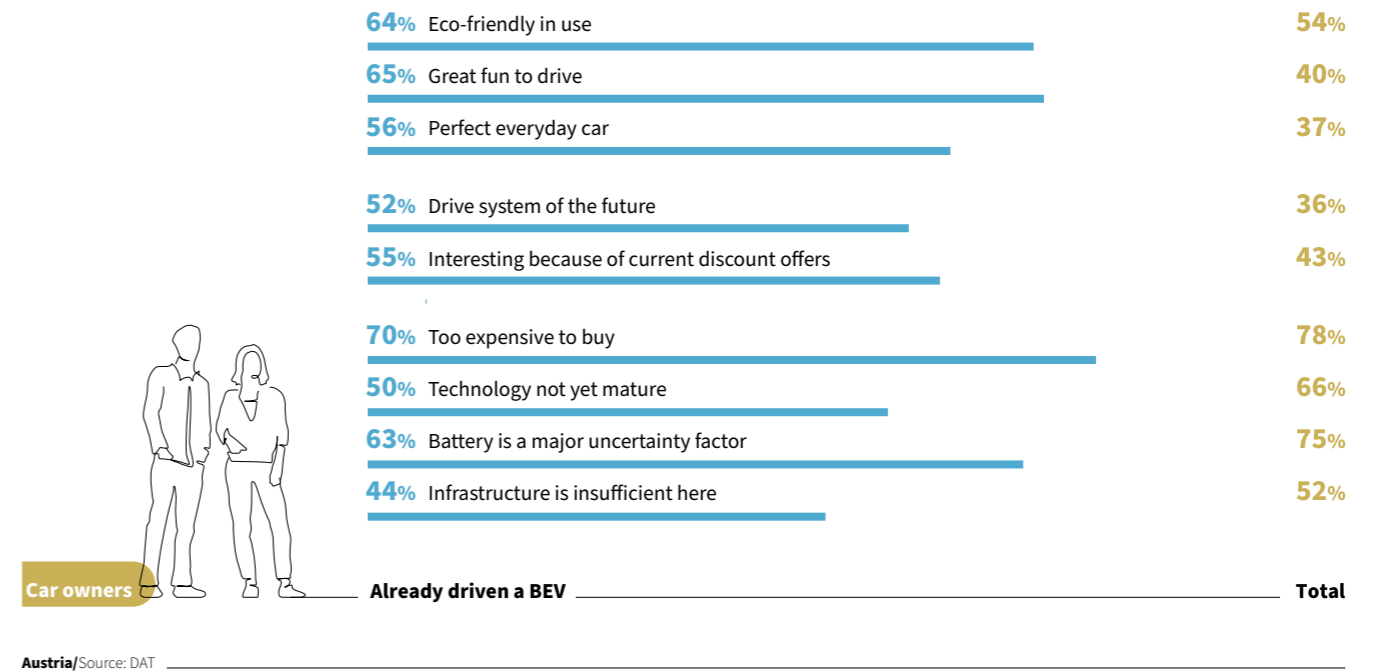
20%
I would consider a car-sharing scheme as an alternative to owning a car.

For 73% of car owners in Austria, owning a car is indispensable. This figure is slightly lower than in other countries. At the same time, many respondents expressed (very) satisfaction with public transportation. It is also noteworthy that significantly fewer car owners in Austria worry that they will no longer be able to afford their own vehicle due to current (economic) developments. Nearly 40% have already gained experience with electric vehicles, and among these, as in other countries, there is a clear shift towards e-mobility. Looking at all car owners, many are still waiting to see how the situation develops. However, at 27%, the number of those who cannot imagine switching to an electric car is significantly lower than in Germany.

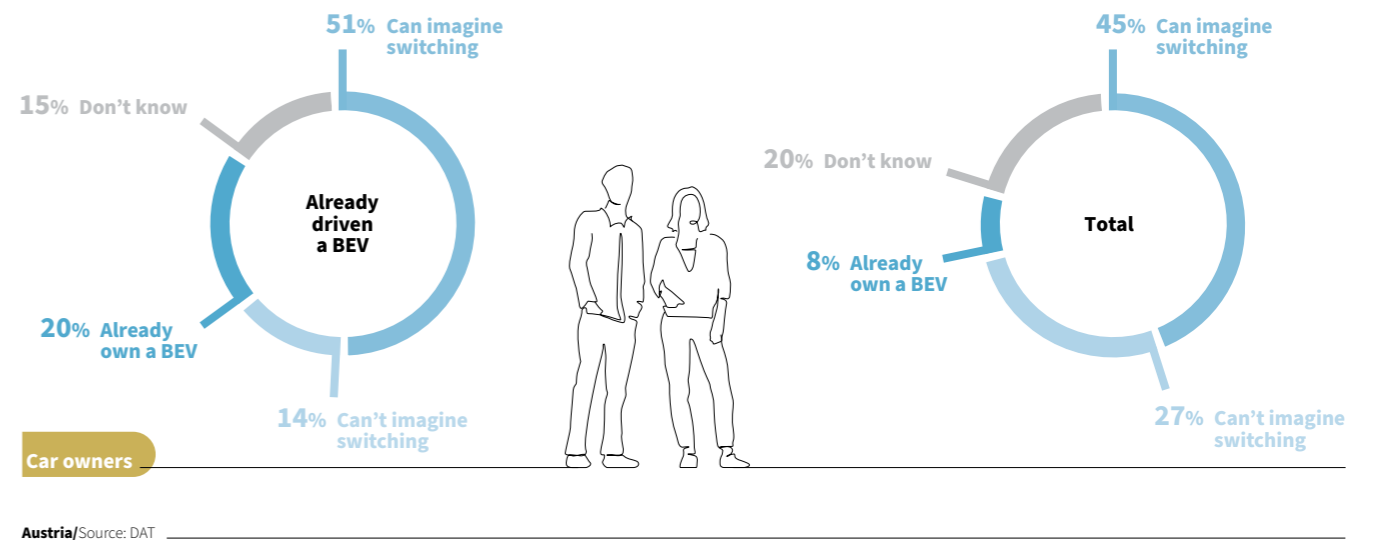
E1 Experience of BEVs 2025



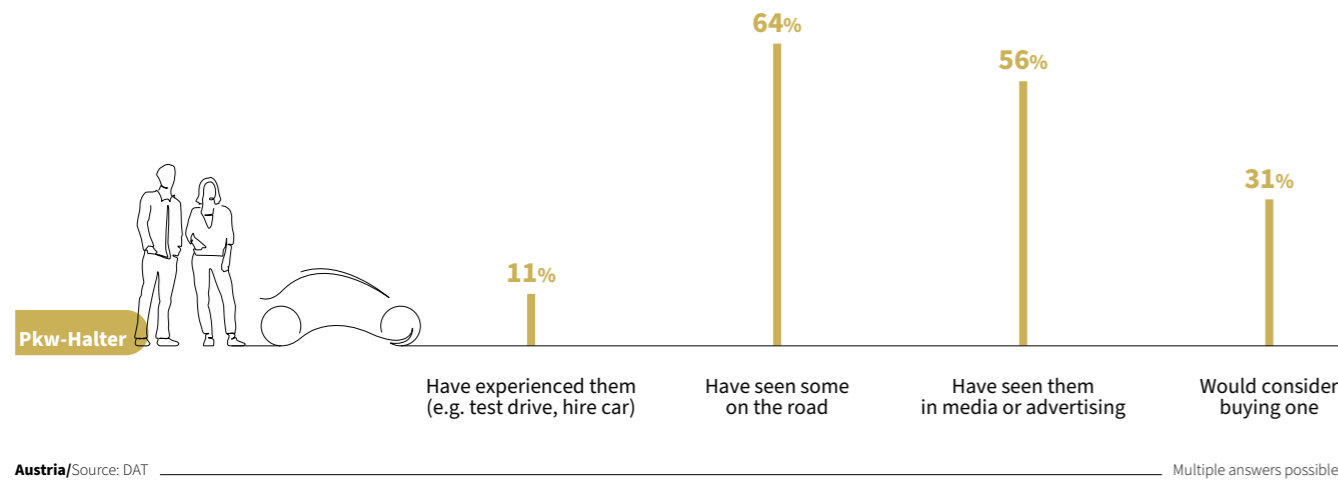
E2 BEVs: assessments of car owners 2025



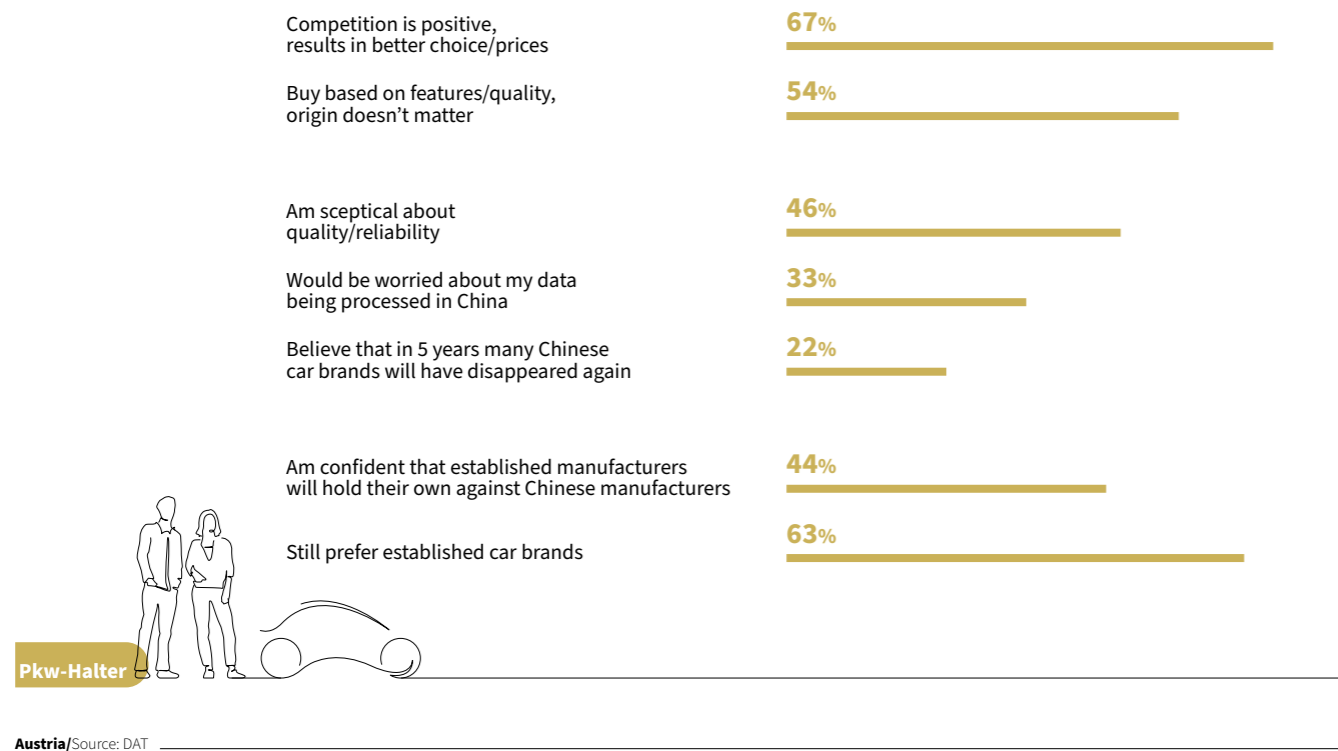
E5 BEVs: car owners' plans to go electric



E7 Statements on Chinese manufacturers' cars 2025



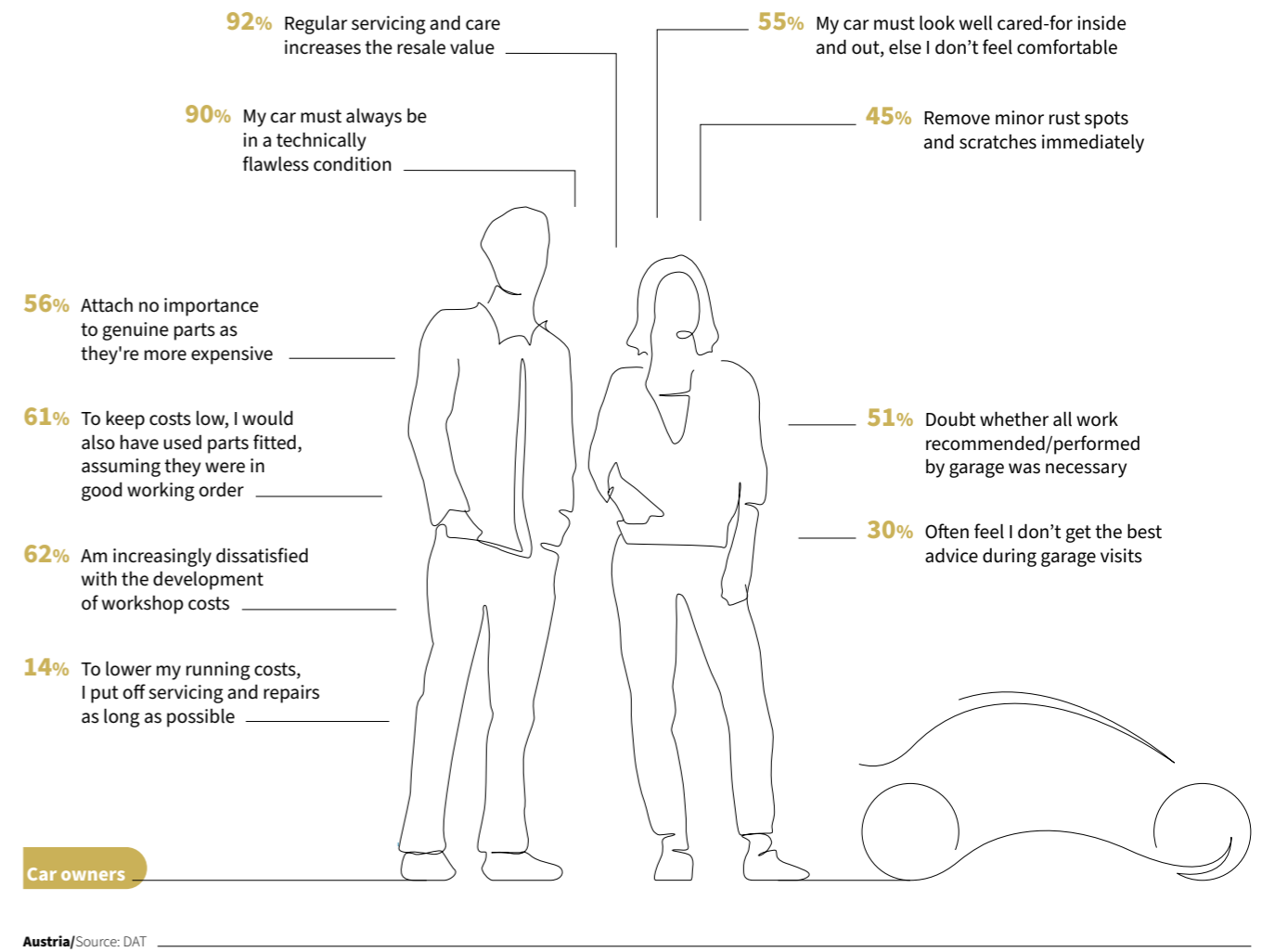
E8 Statements on the topic of Chinese car brands in 2025



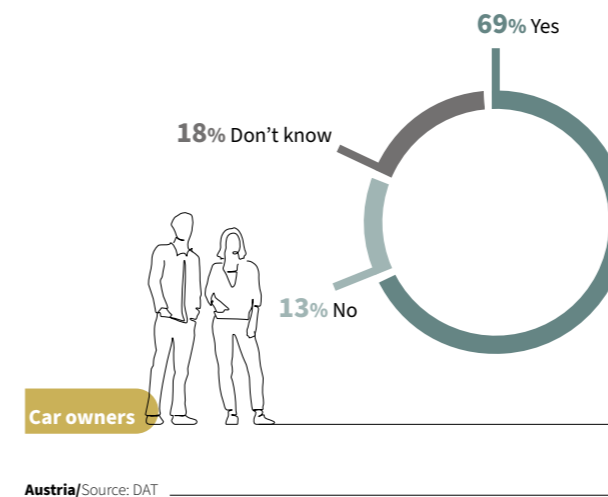
Austrian car owners have an open attitude towards Chinese manufacturers. Almost two-thirds have already seen cars from these manufacturers on the road, and a similar number welcome the competition. Skepticism regarding quality and reliability, at 46%, is lower than

in most other countries compared. 31% of respondents could actually imagine buying a Chinese car. Only 22% agreed with the statement that many Chinese car brands will disappear from the market in about five years. This is also significantly lower than in the other countries.

W15 Statements by car owners on value retention, workshop and care 2025



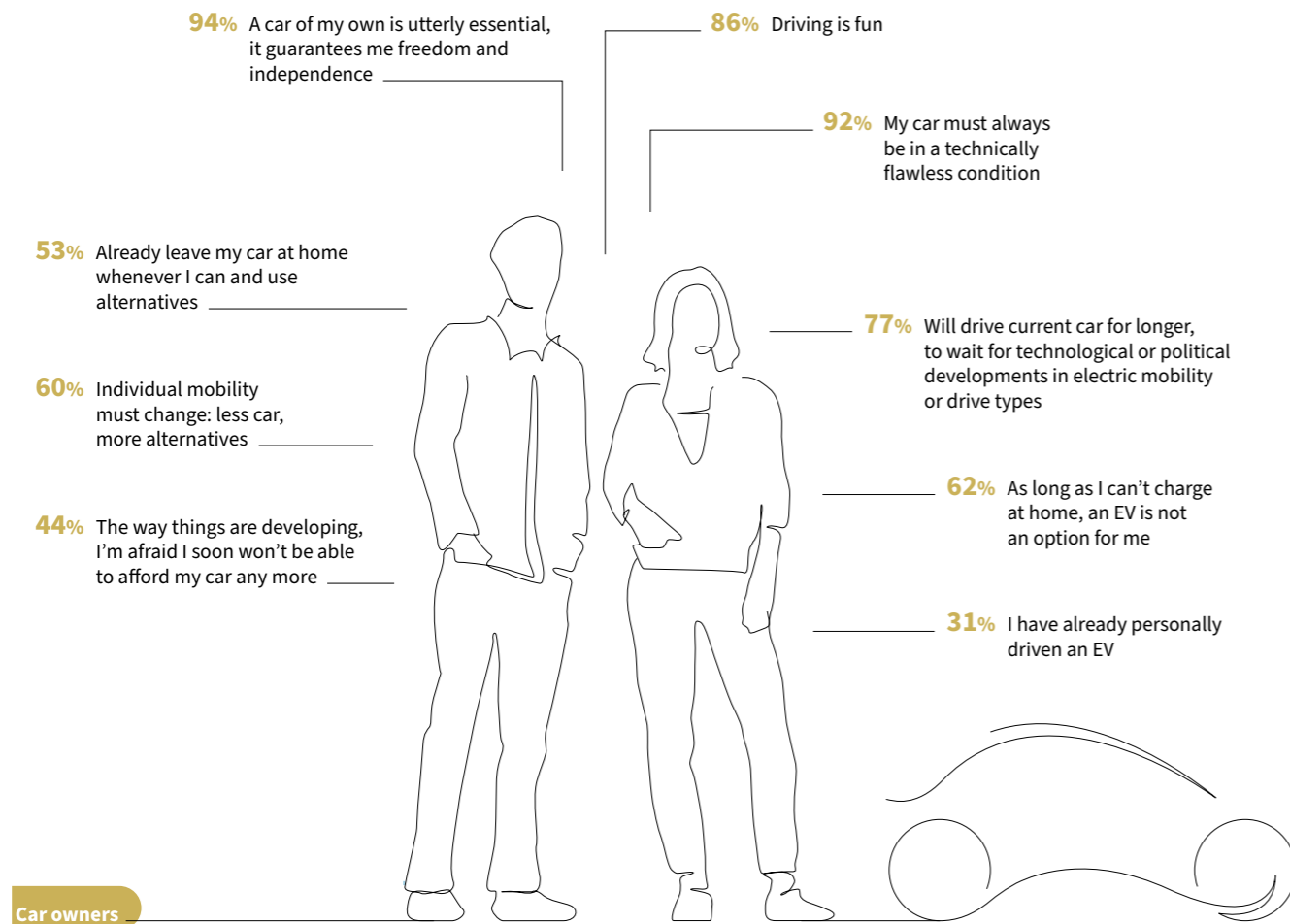
W13 Self-assessment: documenting of damage by smartphone 2025



Looking at the relationship Austrian car owners have with their vehicles and their repair shops, a high standard for maintenance and technical condition is evident. In contrast, compared to other countries, there is a somewhat lower standard for the visual appearance of the vehicle's interior and exterior. And although dissatisfaction with rising repair costs is relatively high at 62%, necessary repairs are not postponed. At 14%, the number of those who do so is the lowest compared to other countries. Austrian car owners are also very confident in their ability to photographically document vehicle damage: 69% state that they would be able to do so.



A2 The car owner and his relationship with the car 2025



France/Source: DAT

85%

Having a car is indispensable to me to ensure my mobility in day-to-day life.

36%

I would consider a car-sharing scheme as an alternative to owning a car.

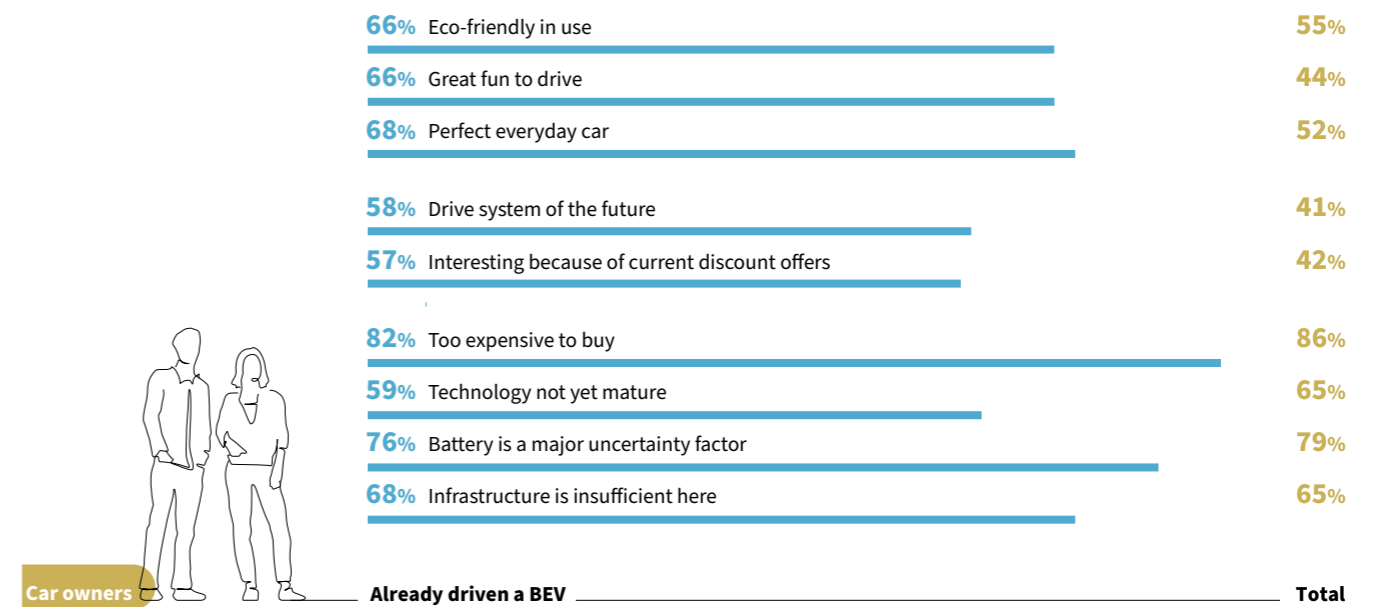
In a large country like France, it's hardly surprising that over 80% consider their own car indispensable for their daily mobility needs. This puts France at the top of the list internationally, since only 18% of car owners live in a major city. However, just over half of all respondents indicated that they also leave their car at home when possible. With 44% stating they are afraid of soon no longer being able to afford their own car, French car owners rank second in the international comparison. Over 70% of French car owners confirmed that they plan to keep their existing vehicles longer to wait and see how electric mobility develops. At the same time, the option of privately charging an electric car also plays a very important role for them. Over 50% could imagine switching to an electric car.

E1 Experience of BEVs 2025



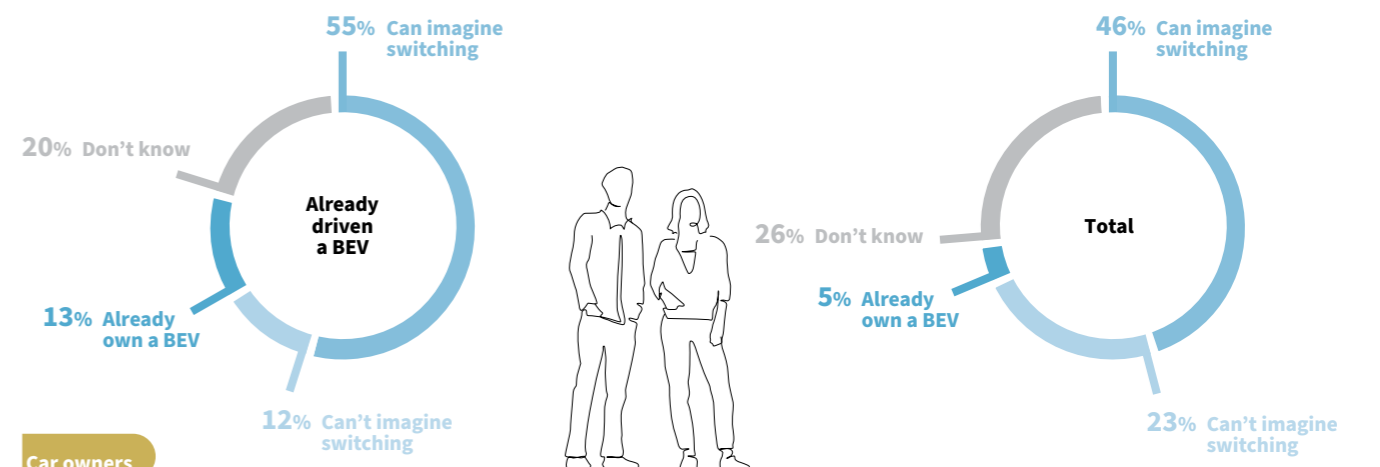
France/Source: DAT

E2 BEVs: assessments of car owners 2025



France/Source: DAT

E5 BEVs: car owners' plans to go electric

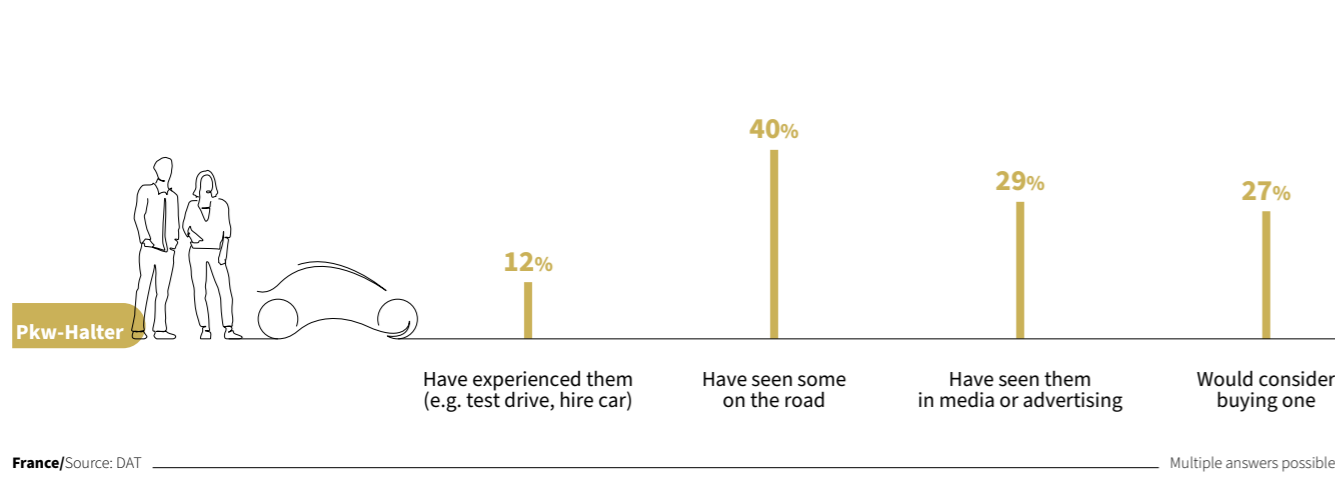


France/Source: DAT

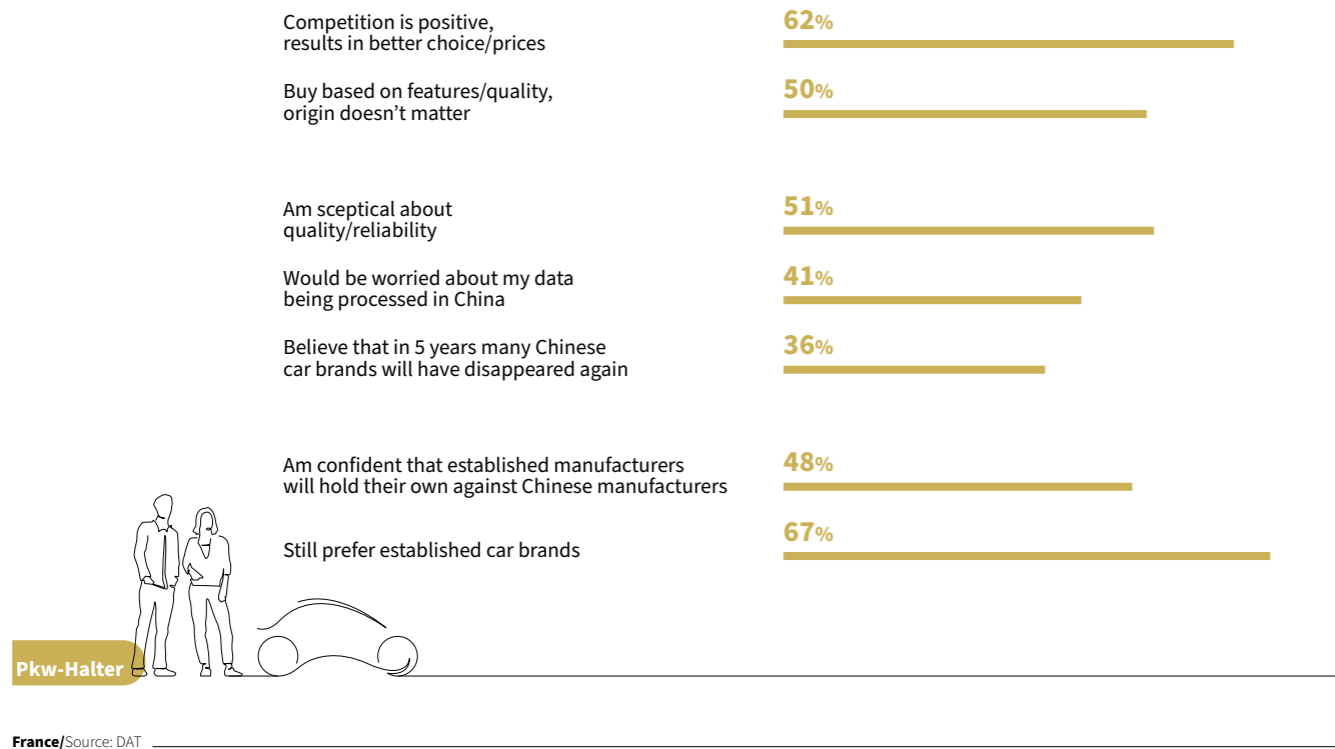




E7 Statements on Chinese manufacturers' cars 2025



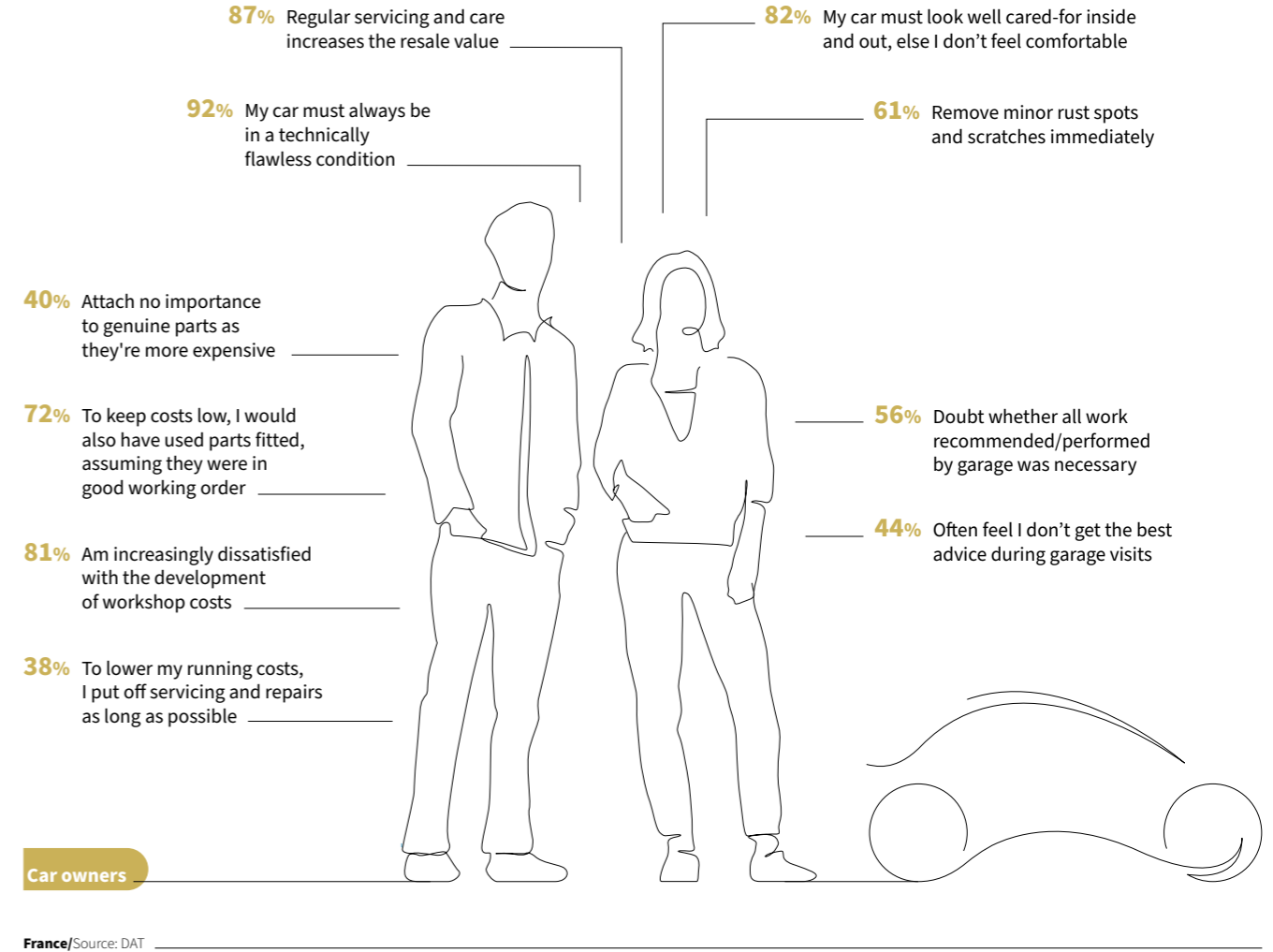
E8 Statements on the topic of Chinese car brands in 2025



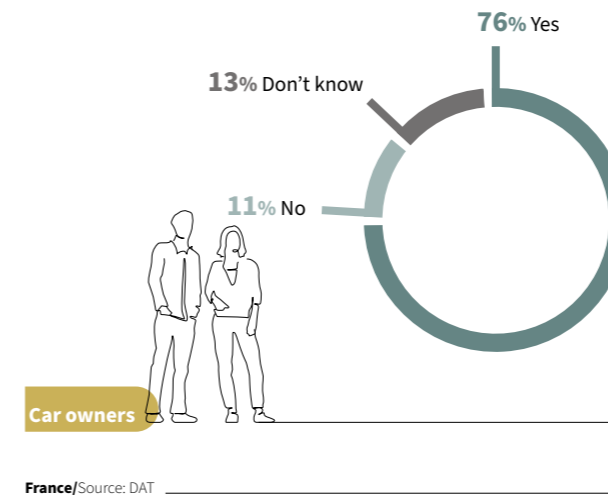
The visibility of Chinese brands is somewhat lower in France than in other countries. Purchase intent, at 27%, ranks last in a country comparison. Italy, for example, is significantly higher at 41%. In France – a country with its own automotive industry – 67% of car owners express

a clear affinity for established car brands. Opinions are divided regarding quality and the ability of established brands to compete with the Chinese. It remains to be seen how French car owners will react to the switch to a Chinese electric vehicle. Nevertheless, a shift towards e-mobility is clearly evident.

W15 Statements by car owners on value retention, workshop and care 2025



W13 Self-assessment: documenting of damage by smartphone 2025

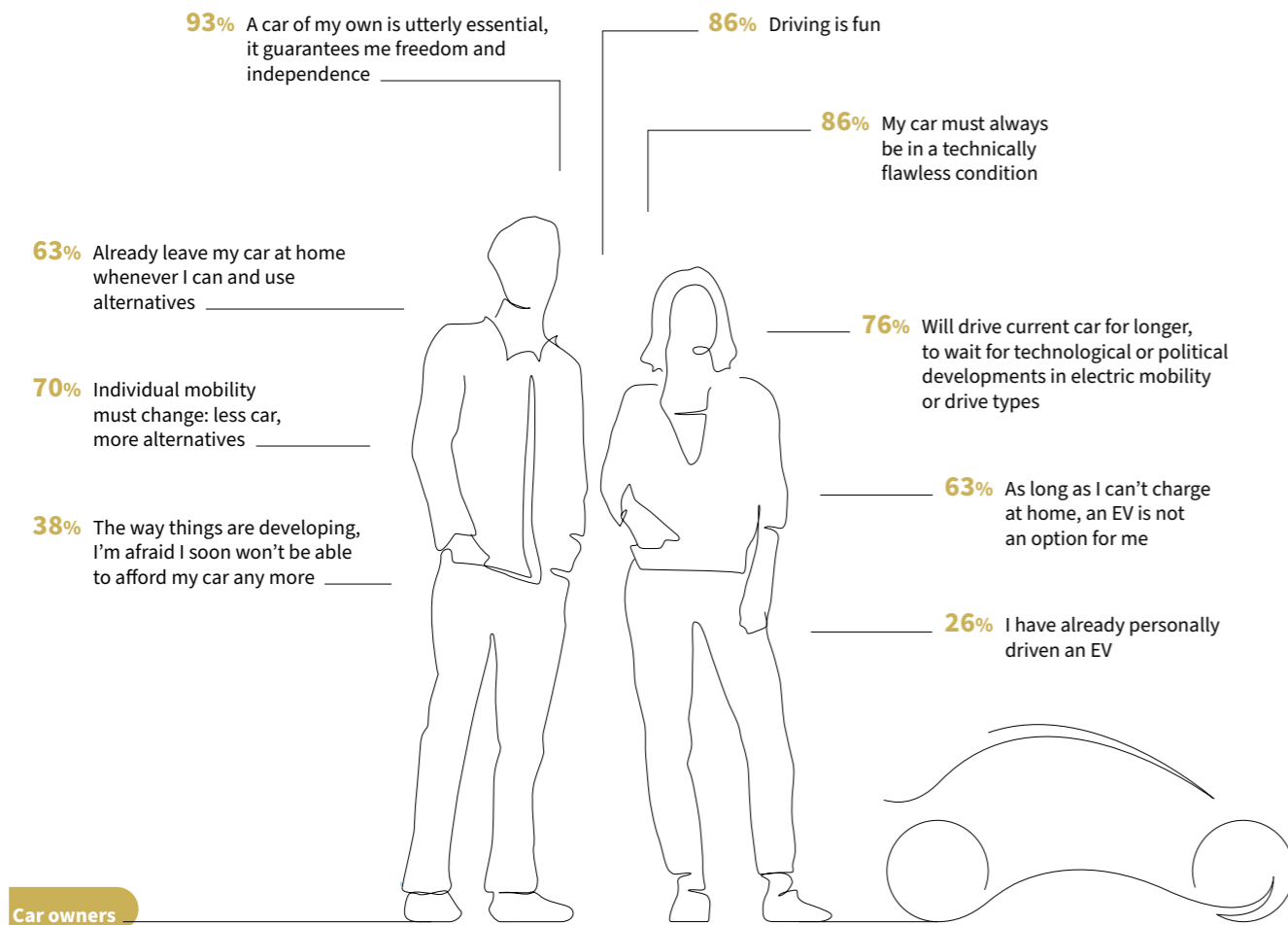


French car owners' relationship with their vehicles is characterized by a high level of satisfaction regarding their vehicles' technical condition. Inspections and, above all, the visual condition also play an important role, particularly when it comes to minor damage to the bodywork or the condition of the interior. However, a striking feature compared to other countries is the high level of dissatisfaction (81%) with the rising costs of maintenance and repairs. Consequently, there is also support for using second-hand parts to reduce costs. Skepticism regarding advice in general, or even the work recommended by a garage, is also more pronounced compared to other countries. Documenting damage with a smartphone is the most common practice among all countries, with 76% approval.





A2 The car owner and his relationship with the car 2025



Italy/Source: DAT

77%

Having a car is indispensable to me to ensure my mobility in day-to-day life.

37%

I would consider a car-sharing scheme as an alternative to owning a car.

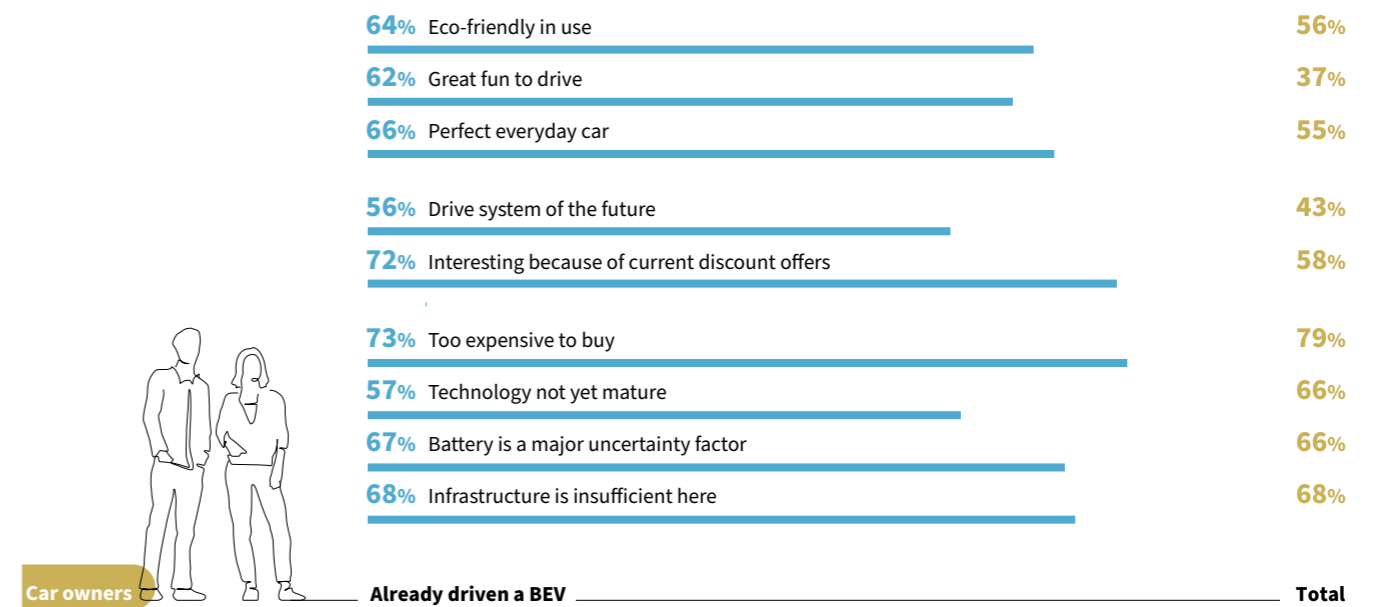
Nearly 80% of all car owners in Italy rely on their cars daily. Over 90% see them as a guarantee of freedom and independence. A strikingly high number (70%) compared internationally confirm that individual mobility needs to change, and almost as many leave their cars at home whenever possible. However, Italian car owners rate their public transport system as poor compared to other countries. Only 26% of car owners have personal experience with electric cars – less than in other countries. Home charging and waiting for further developments are also characteristic of Italian car owners. However, their openness to e-mobility is demonstrated by the fact that 51%, the highest percentage compared to other countries, can imagine switching to electric vehicles.

E1 Experience of BEVs 2025



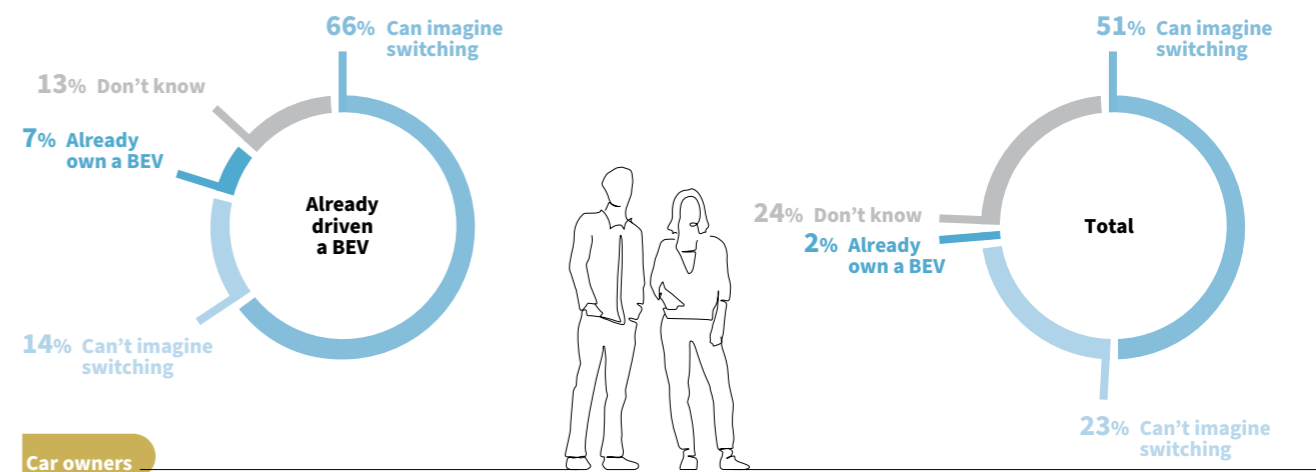
Italy/Source: DAT

E2 BEVs: assessments of car owners 2025



Italy/Source: DAT

E5 BEVs: car owners' plans to go electric

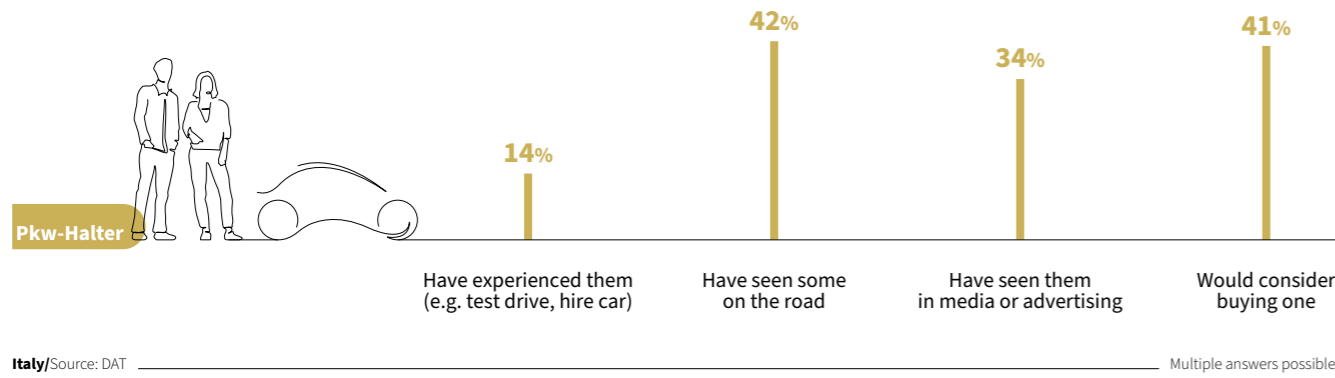


Italy/Source: DAT

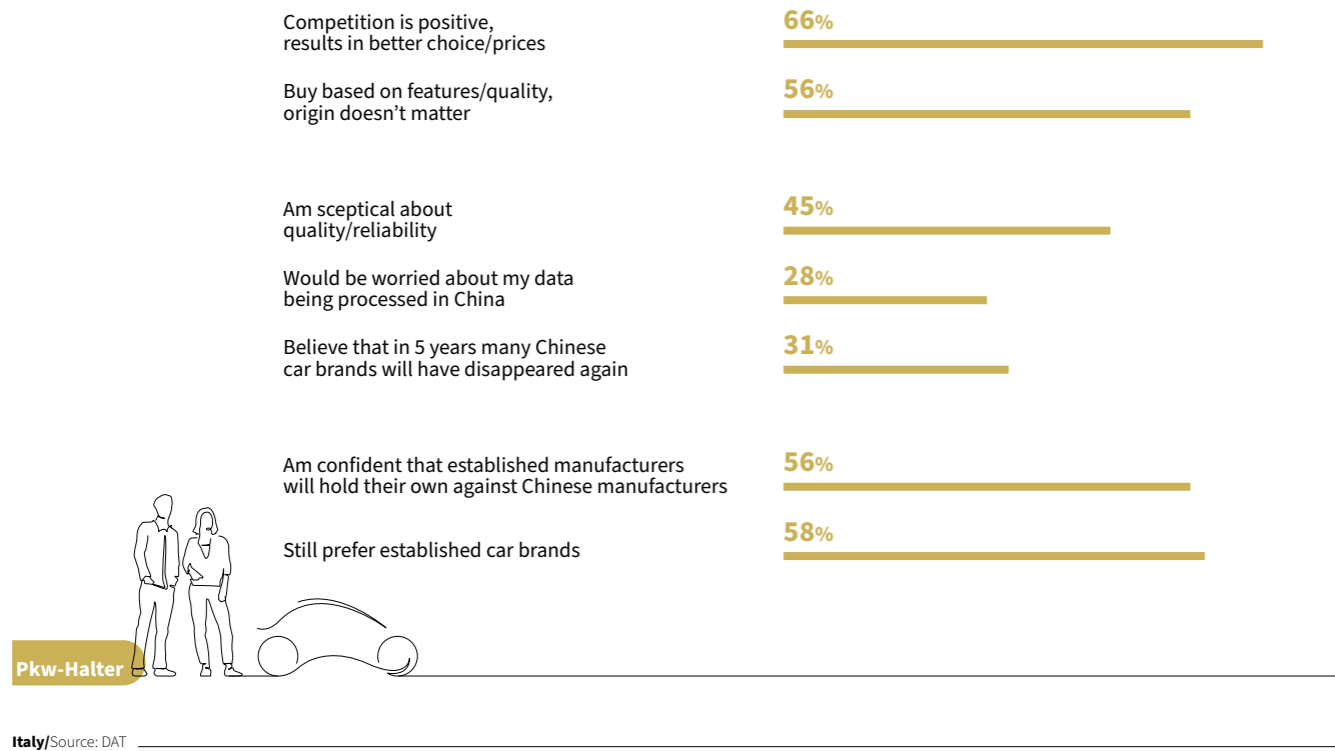




E7 Statements on Chinese manufacturers' cars 2025



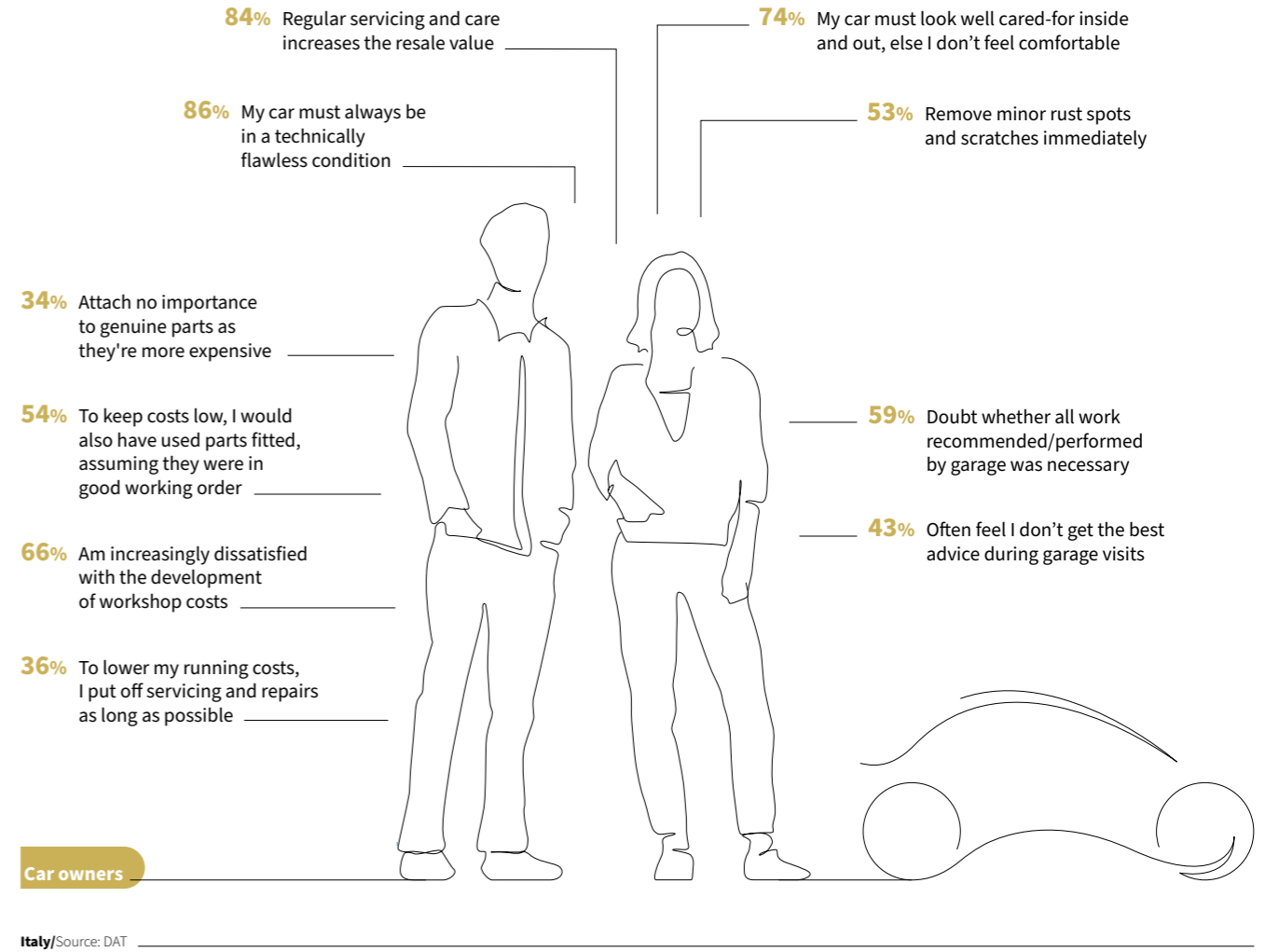
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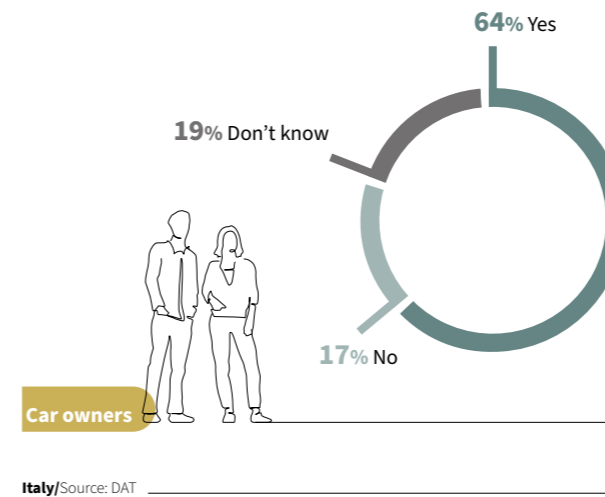
In Italy, cars from Chinese manufacturers are a common sight on the, and the likelihood of considering buying such a car is also very high at 41%, the highest compared to other countries. Italy, a country with its own automotive industry, is therefore undecided about Chinese makes.

Two-thirds view the competition positively, and skepticism regarding quality or data processing in China is relatively low compared to other countries. However more than half of Italian car owners believe in the established manufacturers and their ability to prevail, while almost as many continue to prefer the established car brands.

W15 Statements by car owners on value retention, workshop and care 2025



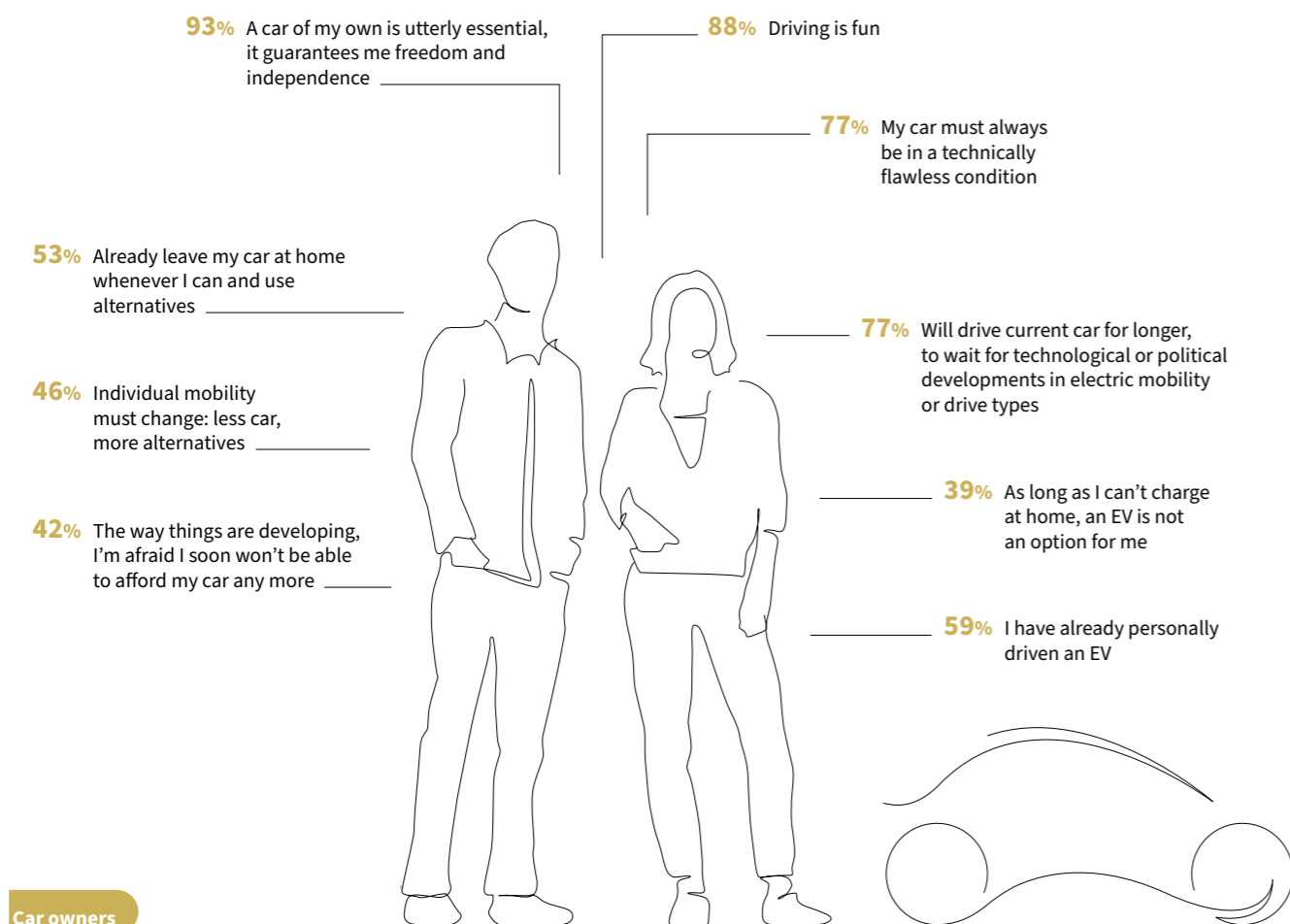
W13 Self-assessment: documenting of damage by smartphone 2025



Analyzing the relationship between Italian car owners and their vehicles reveals that the overall technical condition of their cars is somewhat lower compared to other countries. Original spare parts also play a minor role; slightly more than half of owners would use second-hand parts to save money. Two-thirds of Italian car owners are increasingly dissatisfied with the rising cost of repairs, and the statement "I doubt whether all the work recommended and/or carried out by the garage is necessary" ranks second among Italian car owners, with 59% agreeing with the results. 64% of respondents confirmed that they feel capable of documenting damage using their own smartphone. This places them in the lower middle range compared to other countries.



A2 The car owner and his relationship with the car 2025



Norway/Source: DAT

76%

Having a car is indispensable to me to ensure my mobility in day-to-day life.

28%

I would consider a car-sharing scheme as an alternative to owning a car.

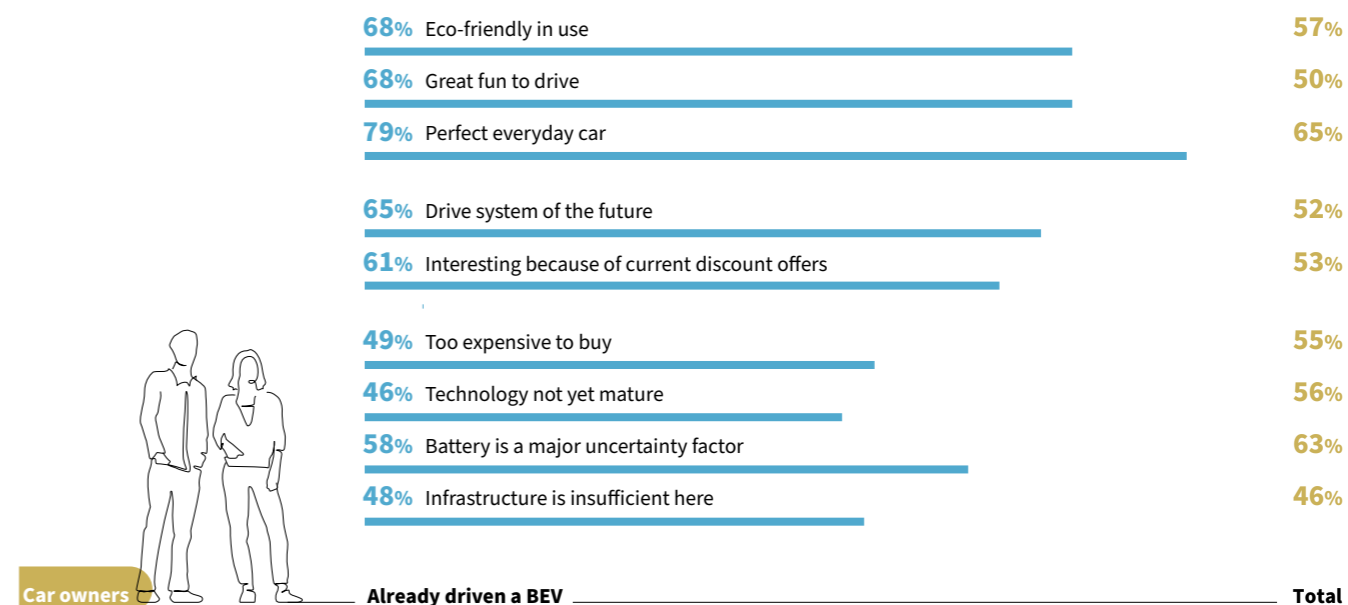
Over 90% of Norwegian car owners consider individual mobility to be of paramount importance, while only 77% view the technical condition of their vehicles as important. The proportion of BEVs is exceptionally high in Norway (27%; all other countries have single-digit percentages). This yields numerous insights: only 39% would consider the lack of private charging a deterrent to purchasing a BEV. Nearly 60% of all car owners have already driven an electric car, and almost two-thirds of all respondents see BEVs as perfect everyday vehicles. Critical views on purchase price, technology, and battery are lower compared to other countries. Nota bene: The number of passenger cars in Norway is only 3 million; the smallest number in this comparison.

E1 Experience of BEVs 2025



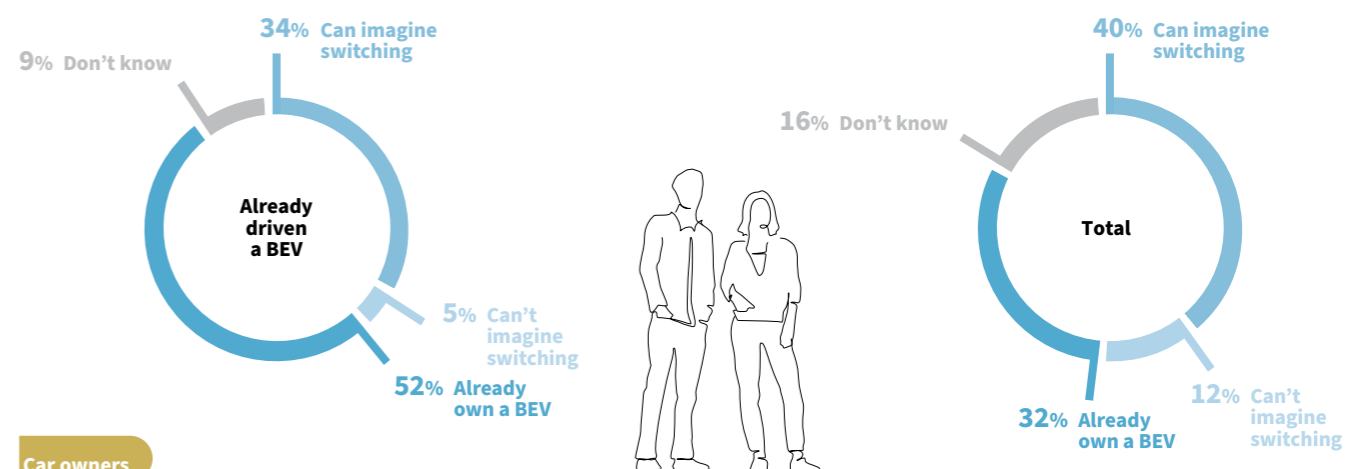
Norway/Source: DAT

E2 BEVs: assessments of car owners 2025



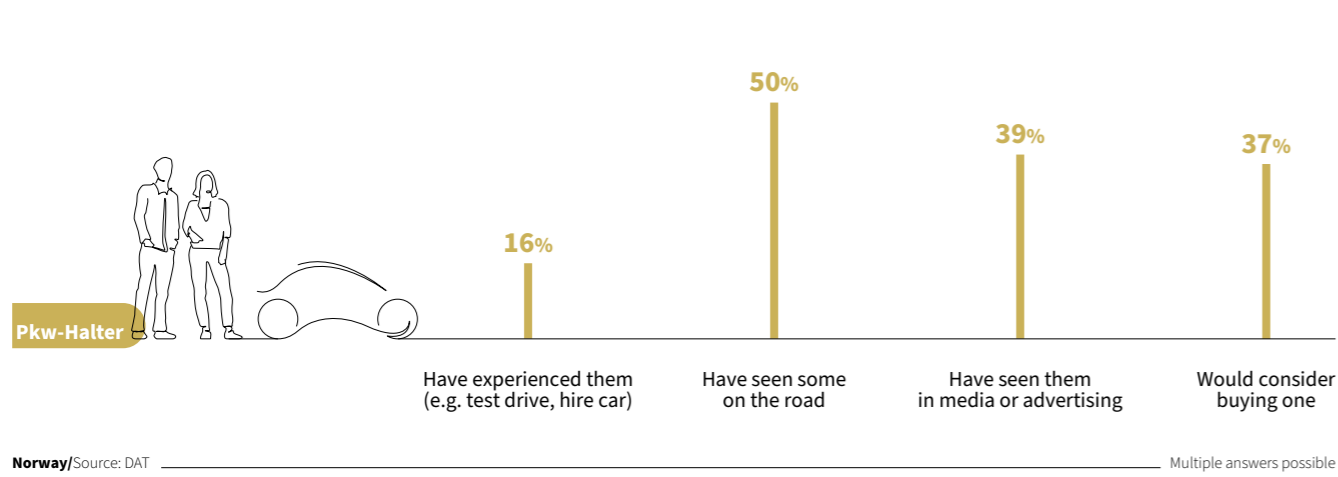
Norway/Source: DAT

E5 BEVs: car owners' plans to go electric

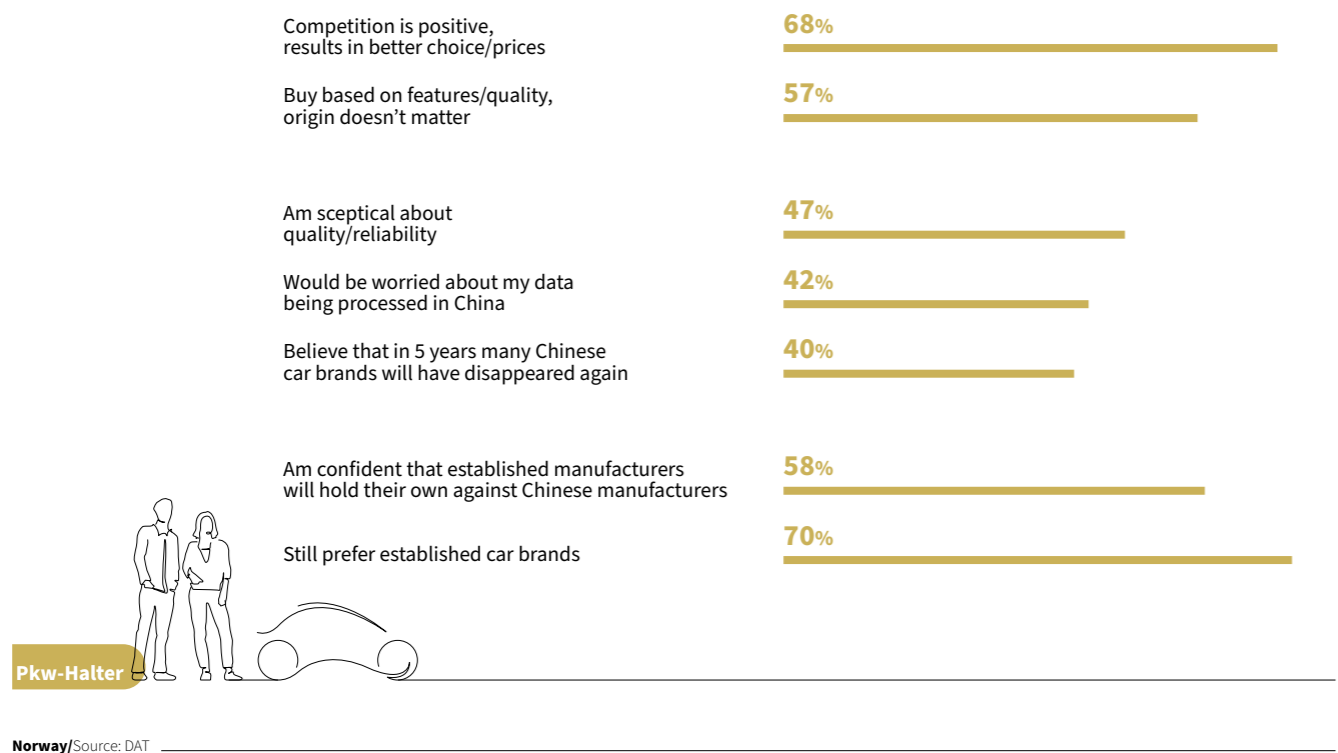


Norway/Source: DAT

E7 Statements on Chinese manufacturers' cars 2025



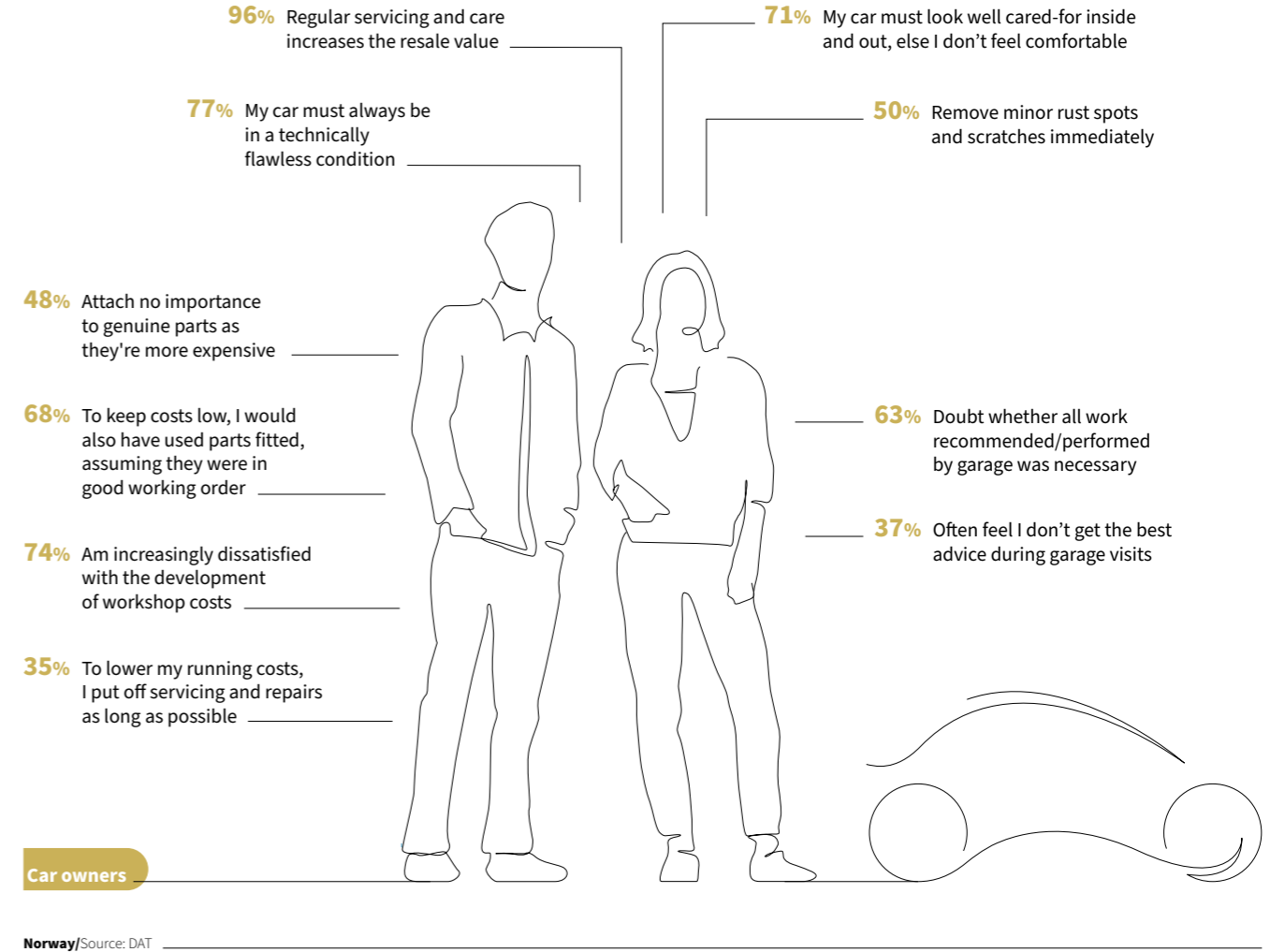
E8 Statements on the topic of Chinese car brands in 2025



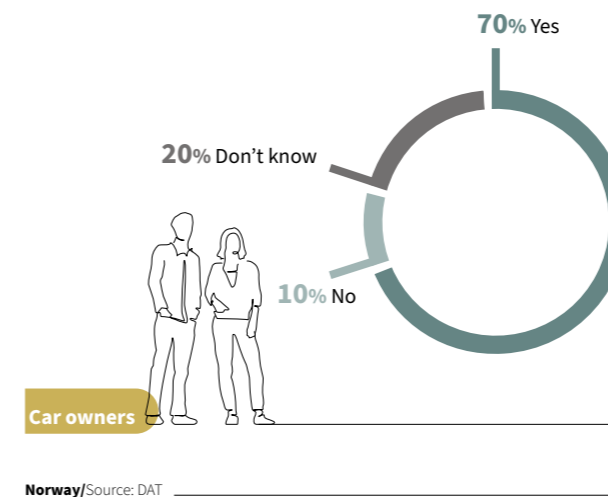
Chinese cars are a common sight on Norwegian roads: 50% of all car owners have seen such vehicles. Norway is a country without its own automotive industry, which suggests a generally positive view of Chinese makes. However, 70% – the highest percentage compared to other

countries – confirmed that they would prefer established brands. There is also considerable scepticism regarding quality and the further processing of data in China. 40%, again the highest percentage of car owners internationally, believe that many Chinese brands will have disappeared from the market within five years.

W15 Statements by car owners on value retention, workshop and care 2025



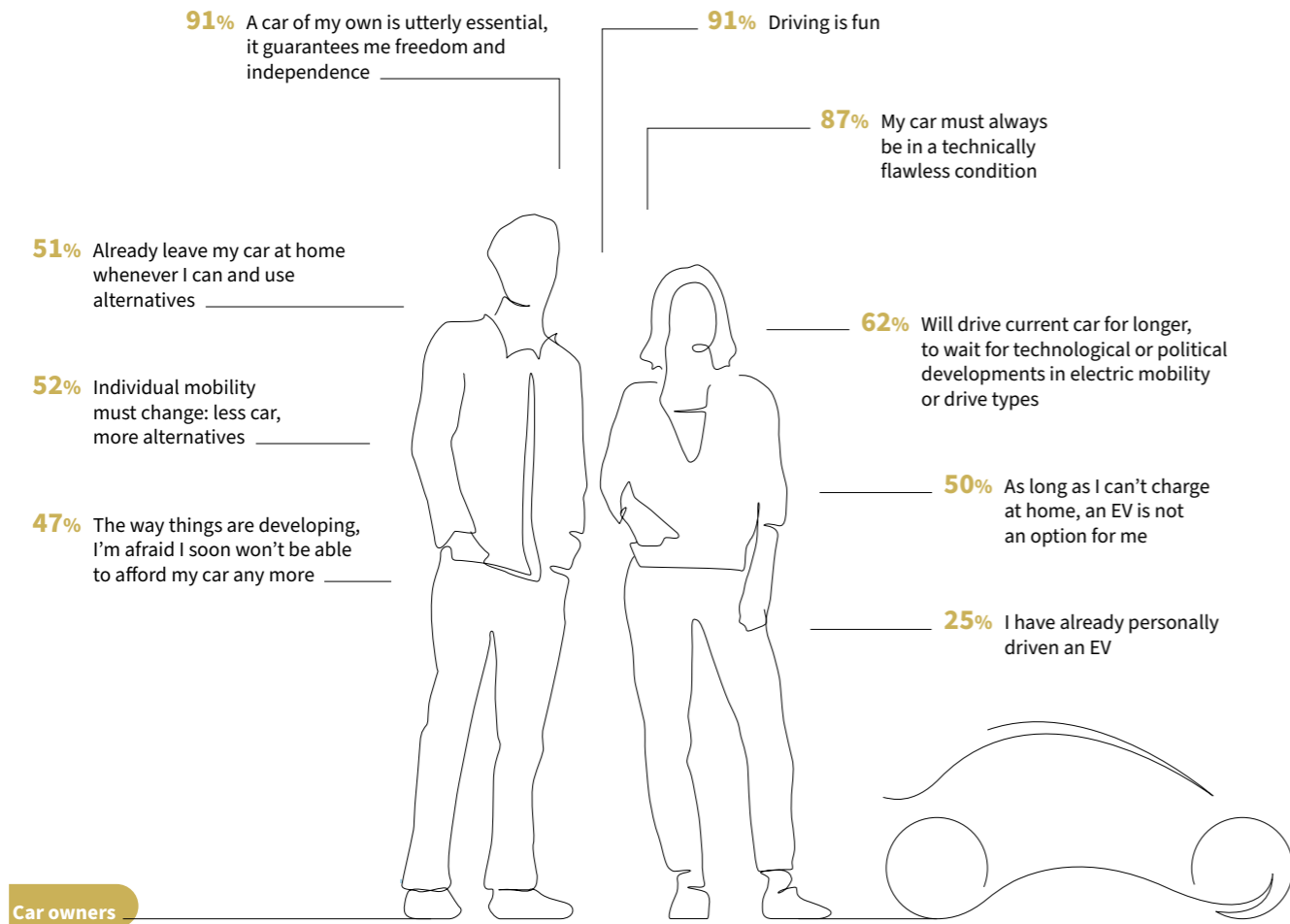
W13 Self-assessment: documenting of damage by smartphone 2025



Norwegian car owners have the highest approval rating when it comes to regular vehicle maintenance to preserve their car's value. At the same time, their assessment of their cars' visual condition is rather average. Regarding the development of workshop costs, 74% confirmed that they are increasingly dissatisfied. To reduce these costs, 68% would use second-hand parts. They also top the international comparison in these two statements. Over a third would also postpone necessary repairs to save money. And they also lead the way (63%) in doubting the work recommended by their mechanics. Once again, their self-assessment regarding the documentation of vehicle damage using their own smartphones is very high (70%).



A2 The car owner and his relationship with the car 2025



Poland/Source: DAT

77%
Having a car is indispensable to me to ensure my mobility in day-to-day life.

34%
I would consider a car-sharing scheme as an alternative to owning a car.

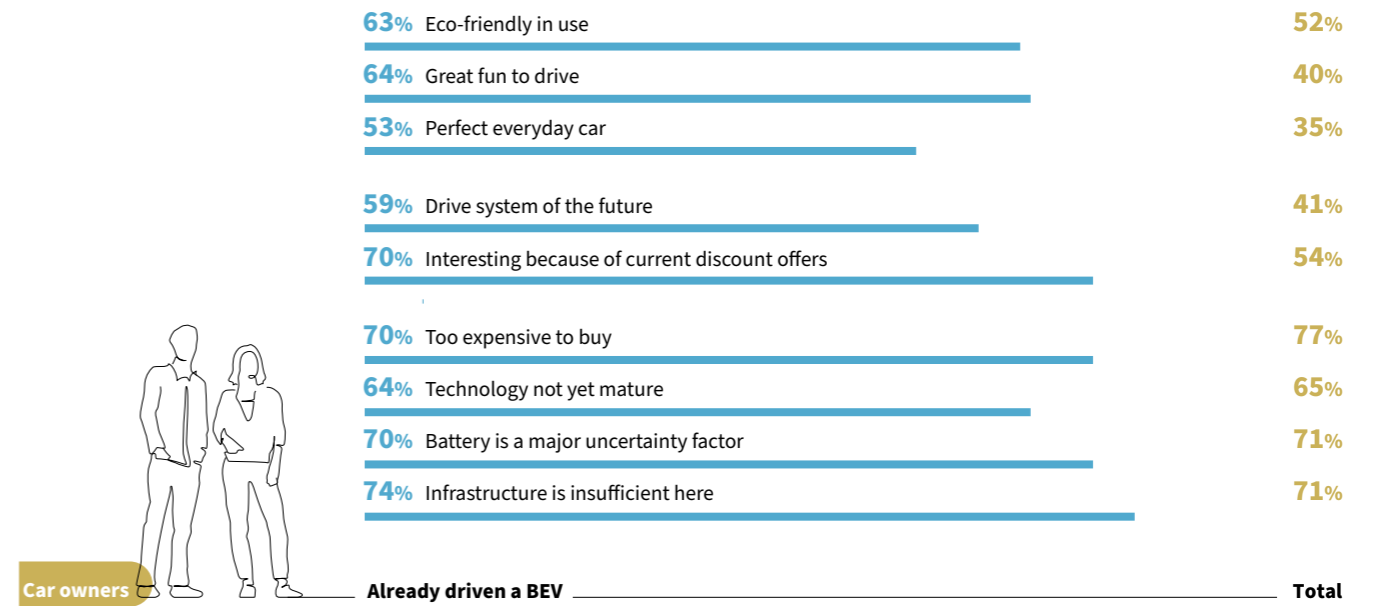
Poland is one of the larger European countries in terms of area, yet it has the lowest average household income among car owners. Electrification of the total car fleet is at 1%. Over 90% of Polish car owners consider their car essential, but about half fear they will soon no longer be able to afford it. They leave their cars at home whenever possible and use alternatives. This strategy appears to be working, as over 40% live in large cities – significantly more than in other countries (with the exception of Spain: 50%). Only 25% have personal experience with electric vehicles, the lowest figure internationally. This also explains the high number of those unsure whether they could imagine switching to an electric car (35%).

E1 Experience of BEVs 2025



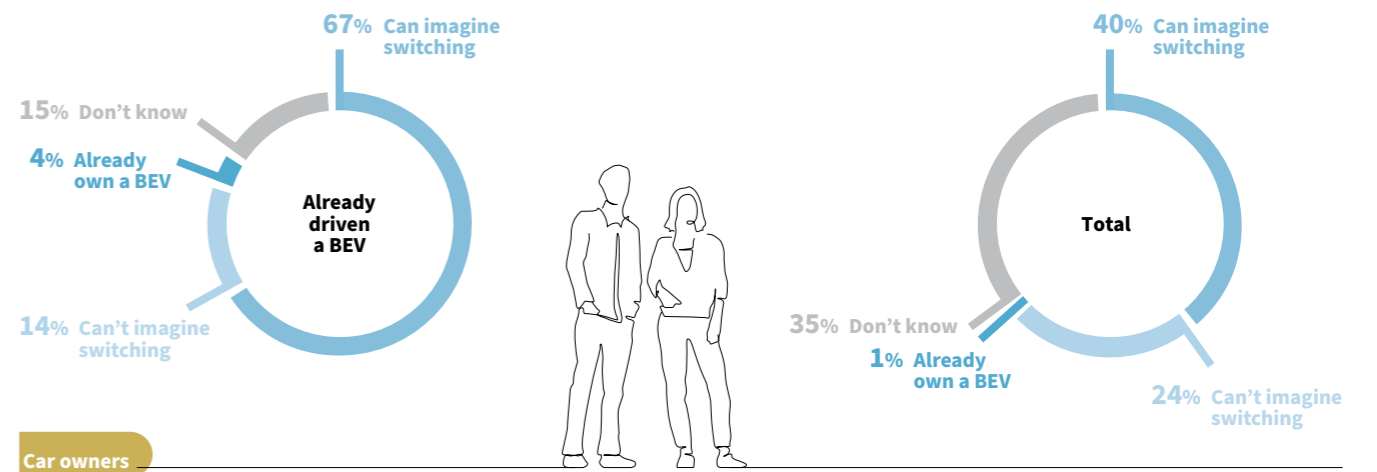
Poland/Source: DAT

E2 BEVs: assessments of car owners 2025



Poland/Source: DAT

E5 BEVs: car owners' plans to go electric

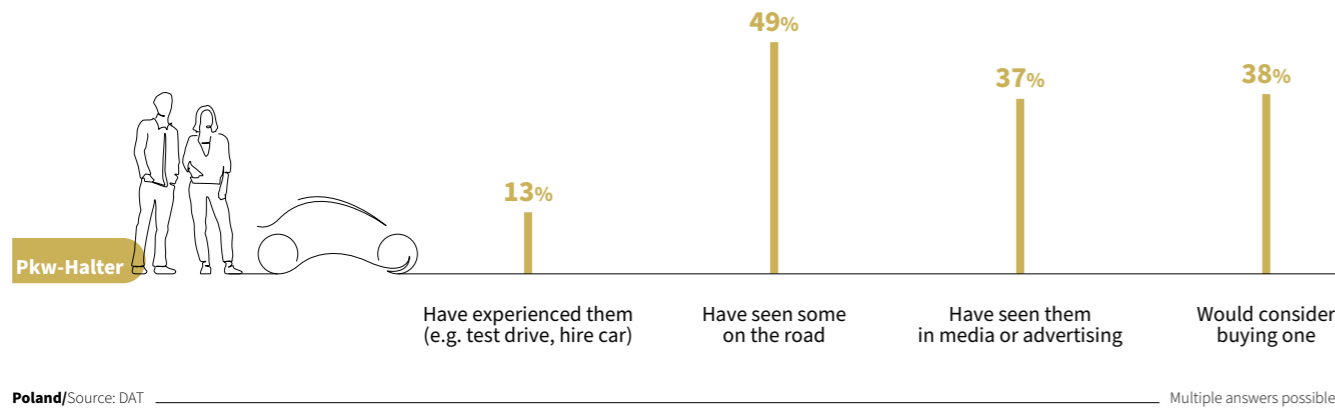


Poland/Source: DAT

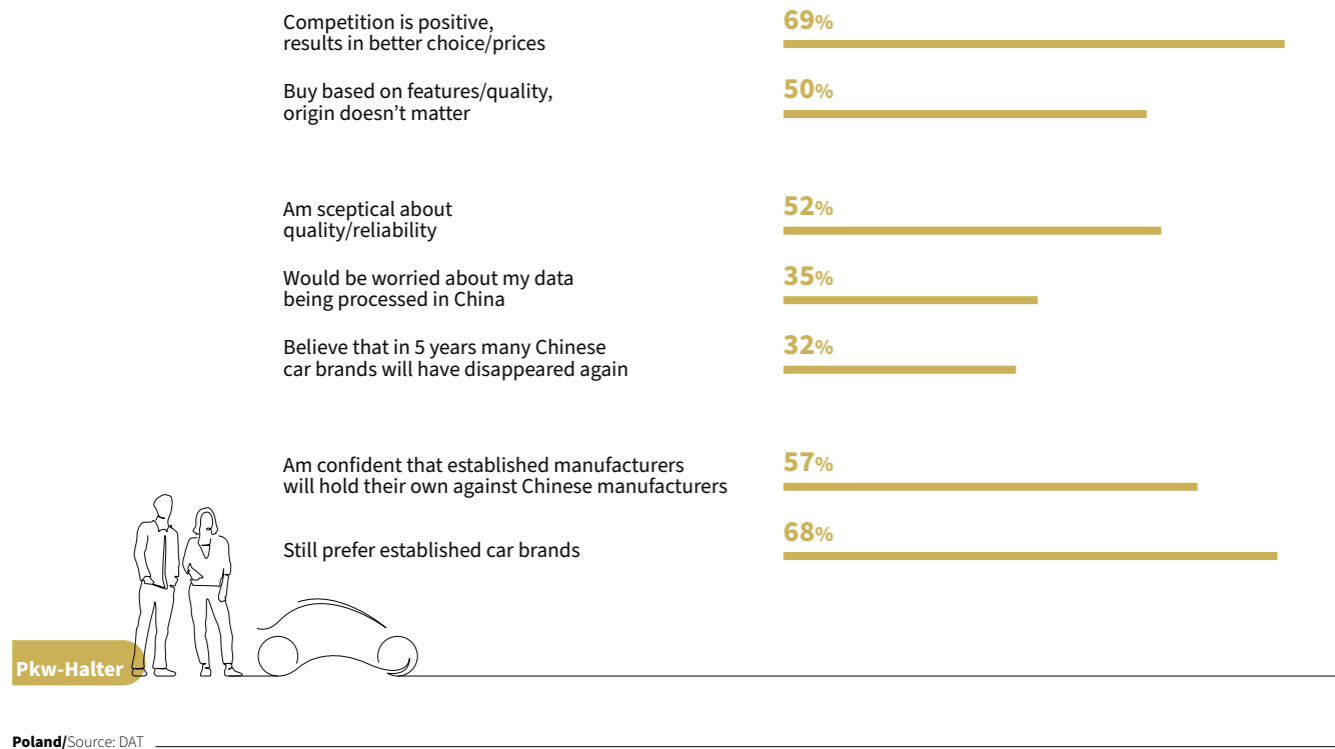




E7 Statements on Chinese manufacturers' cars 2025



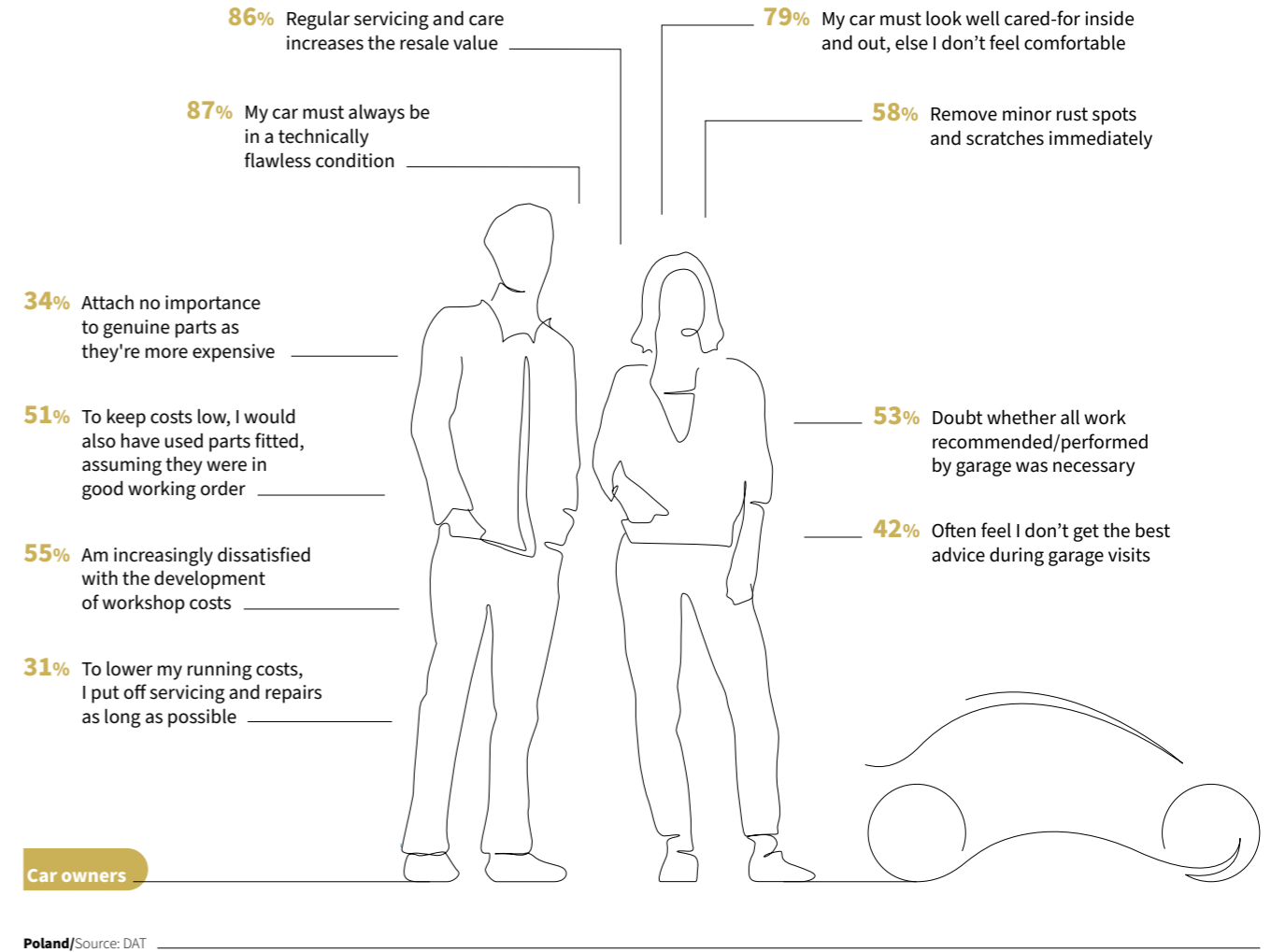
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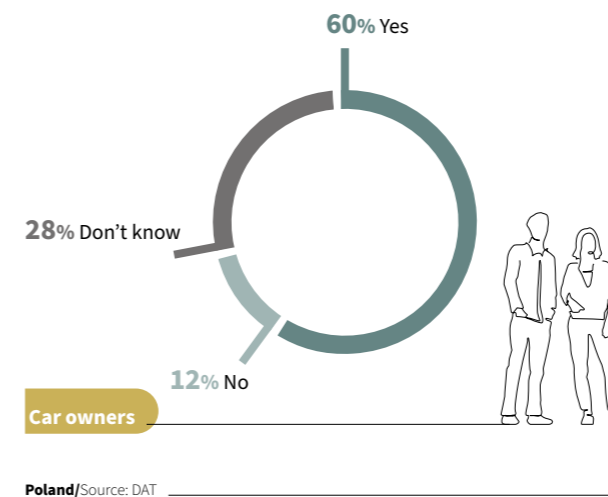
Cars from Chinese manufacturers are a common sight on Polish roads, and nearly 50% of Polish car owners have seen them. Almost 40% could imagine buying such a vehicle, and nearly 70% welcome the competition. However, just over half of all respondents expressed scepticism regarding the quality. It is noteworthy that, compared to

other countries, the approval rating for established manufacturers (68%) remains very high. 35% of respondents believe that many Chinese manufacturers will have disappeared from the market within five years. This puts Poland in line with the average across other countries.

W15 Statements by car owners on value retention, workshop and care 2025



W13 Self-assessment: documenting of damage by smartphone 2025

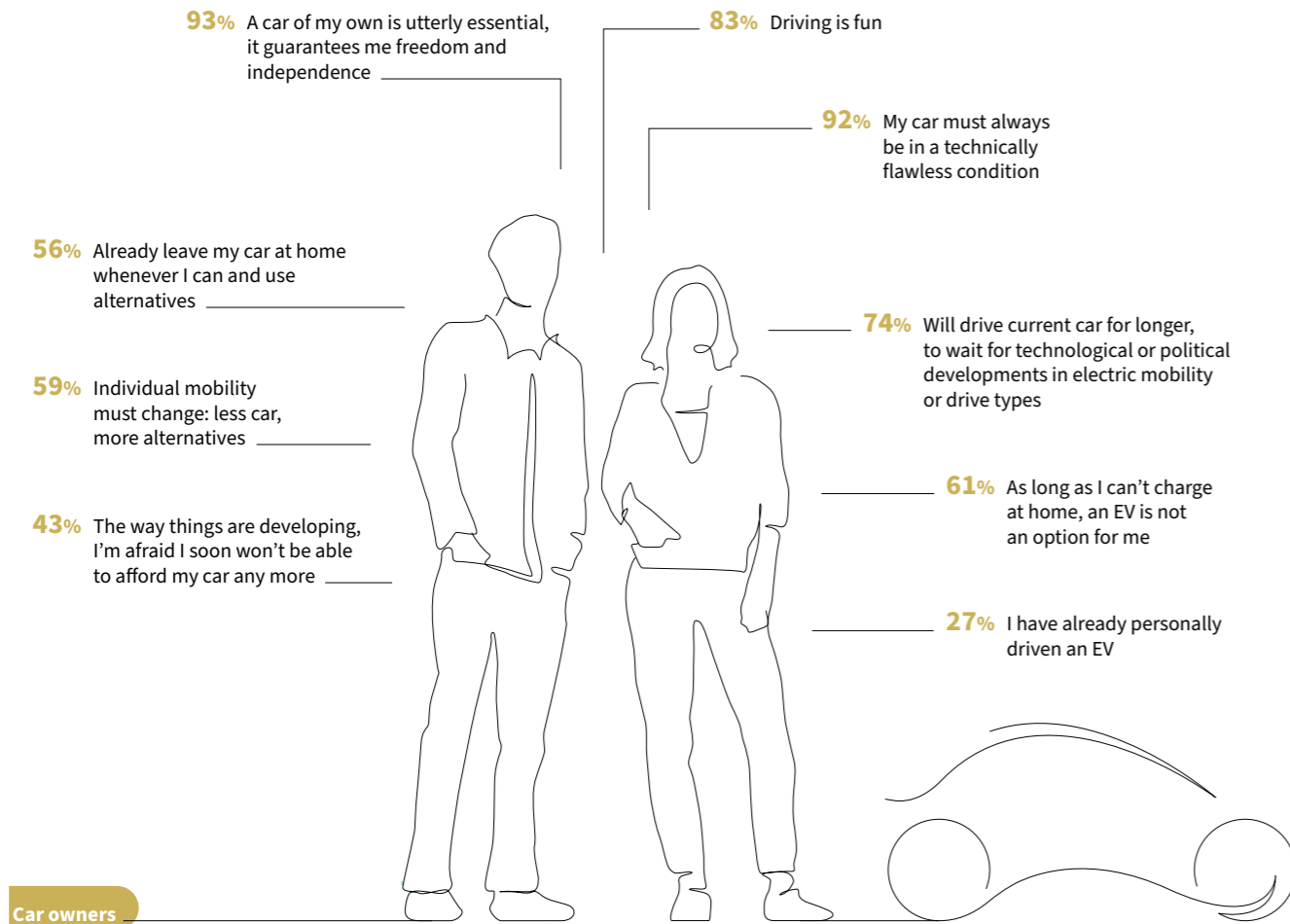


Polish car owners value their vehicles at a similarly high level as car owners in other markets included in this comparison. They advocate regular inspections to maintain the vehicle's value and confirmed more frequently than car owners in other countries that they have minor scratches and dents repaired. Over half are dissatisfied with the rising cost of repairs, so it's not surprising that almost as many would also support using second-hand parts if it meant saving money. Slightly more than half of Polish car owners also doubt that all the work recommended by repair shops is truly necessary. When it comes to documenting damage to their own vehicle using a smartphone, only 60% of car owners feel confident doing so. This is the lowest figure in the international comparison.





A2 The car owner and his relationship with the car 2025



Spain/Source: DAT

75%
Having a car is indispensable to me to ensure my mobility in day-to-day life.

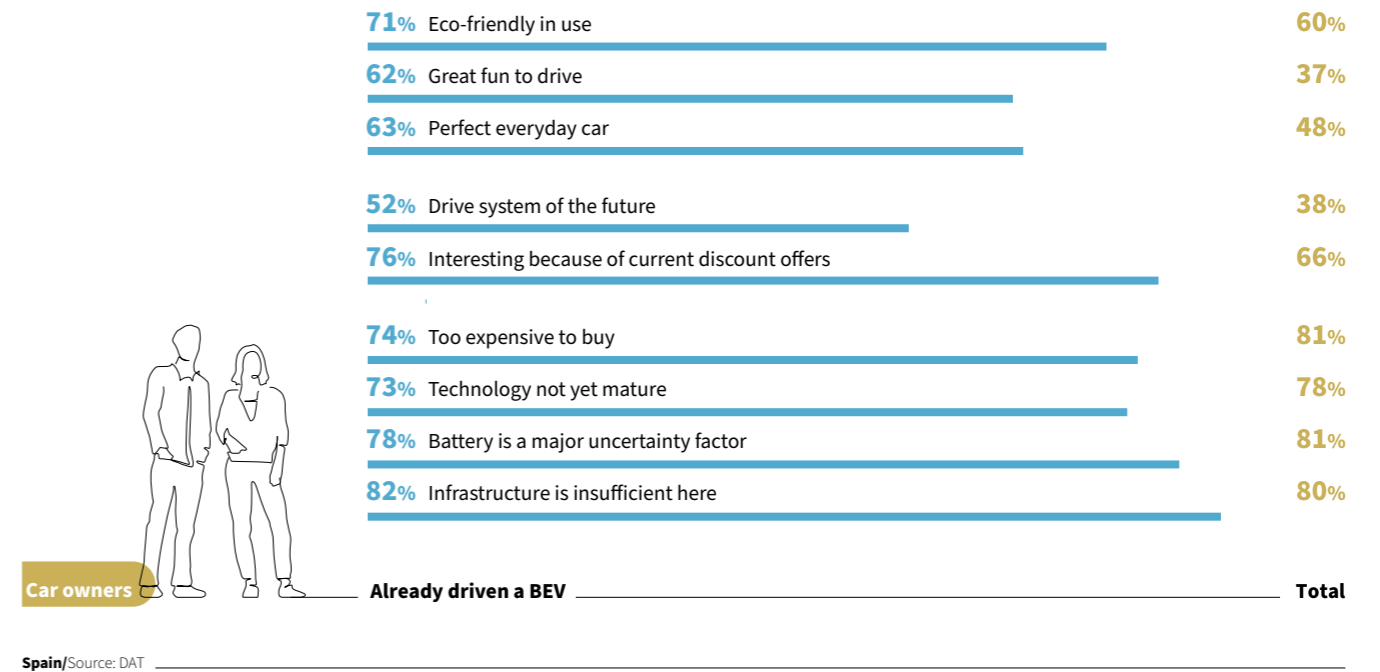
40%
I would consider a car-sharing scheme as an alternative to owning a car.

After Poland, Spain has the highest average age of its passenger car fleet at 11.2 years, and over 70% of owners plan to keep their vehicles longer to wait for developments in drive technology. An important factor here is that half of all Spanish car owners live in large cities, while only 24% live in small towns. This is the lowest figure internationally. Only 1% of the car fleet is currently electric, meaning that only 27% of all Spanish car owners have any experience with electric vehicles. However, the openness towards e-mobility is evident in the fact that almost 50% can imagine switching to electric vehicles. Almost all Spanish car owners agree, with 80% of respondents stating that the charging infrastructure is inadequate.

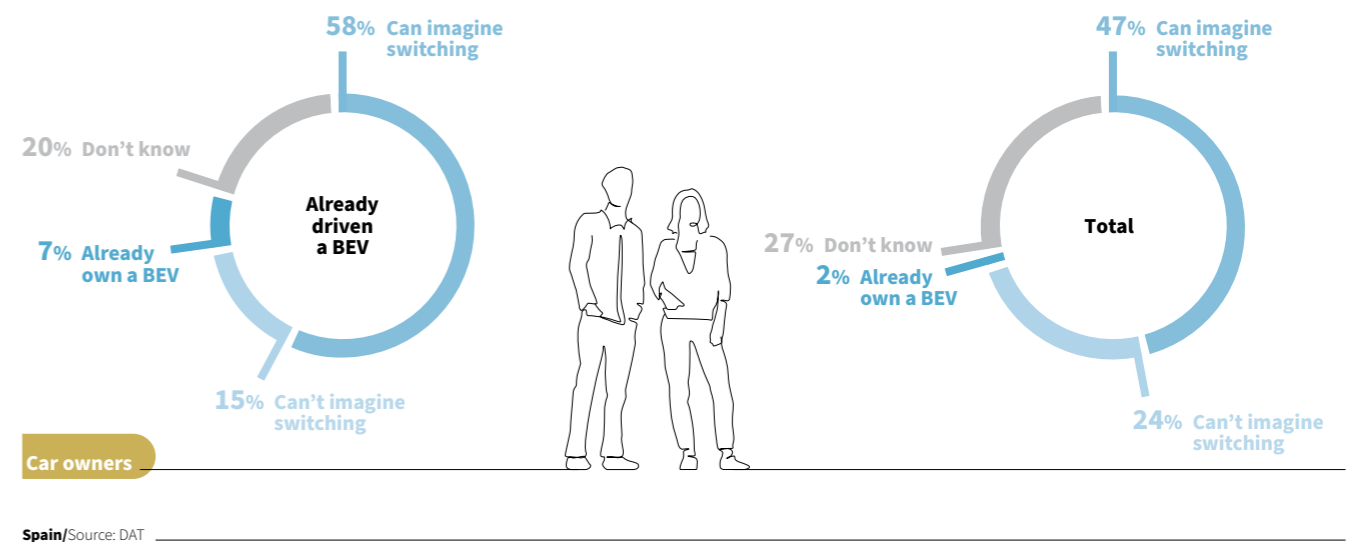
E1 Experience of BEVs 2025



E2 BEVs: assessments of car owners 2025

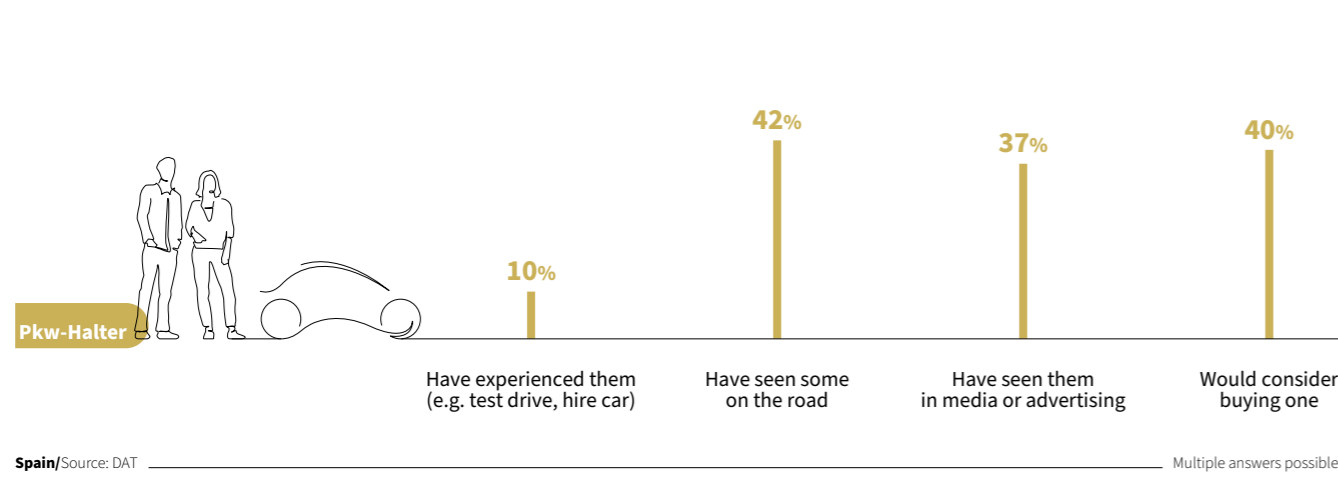


E5 BEVs: car owners' plans to go electric

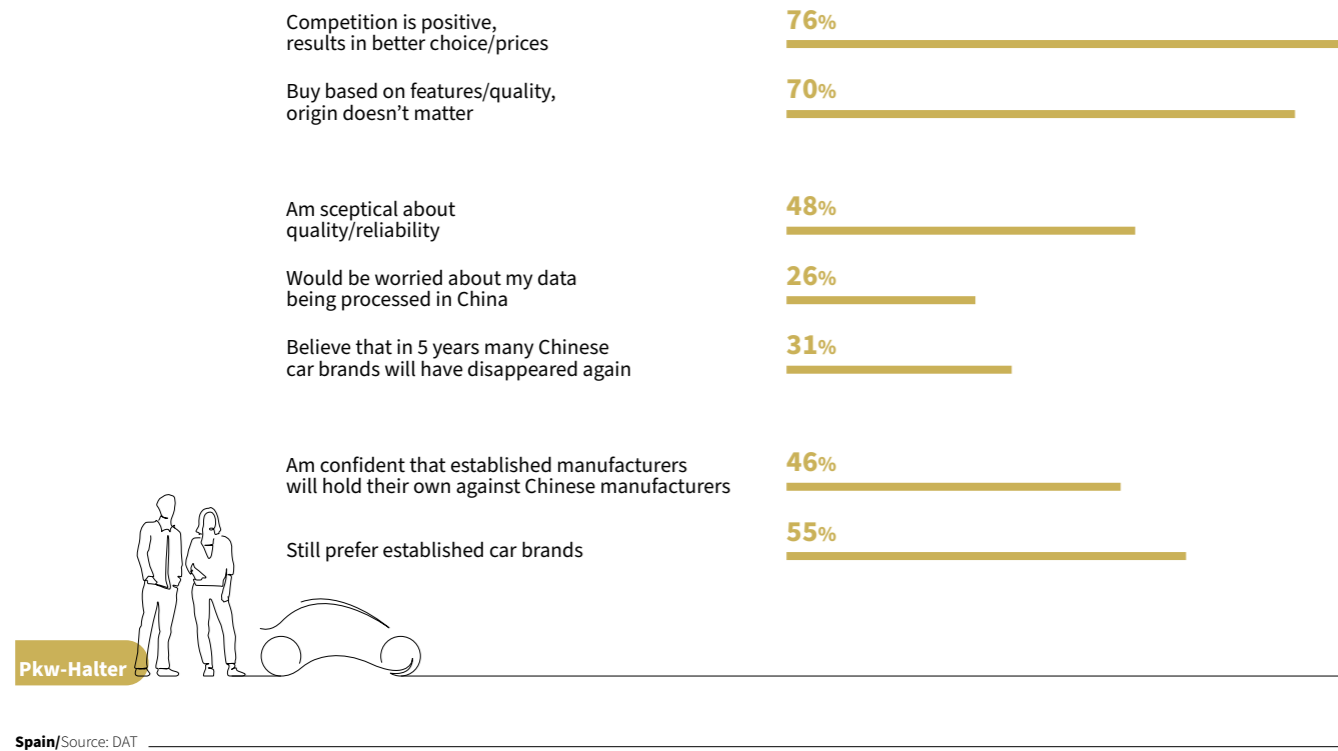




E7 Statements on Chinese manufacturers' cars 2025



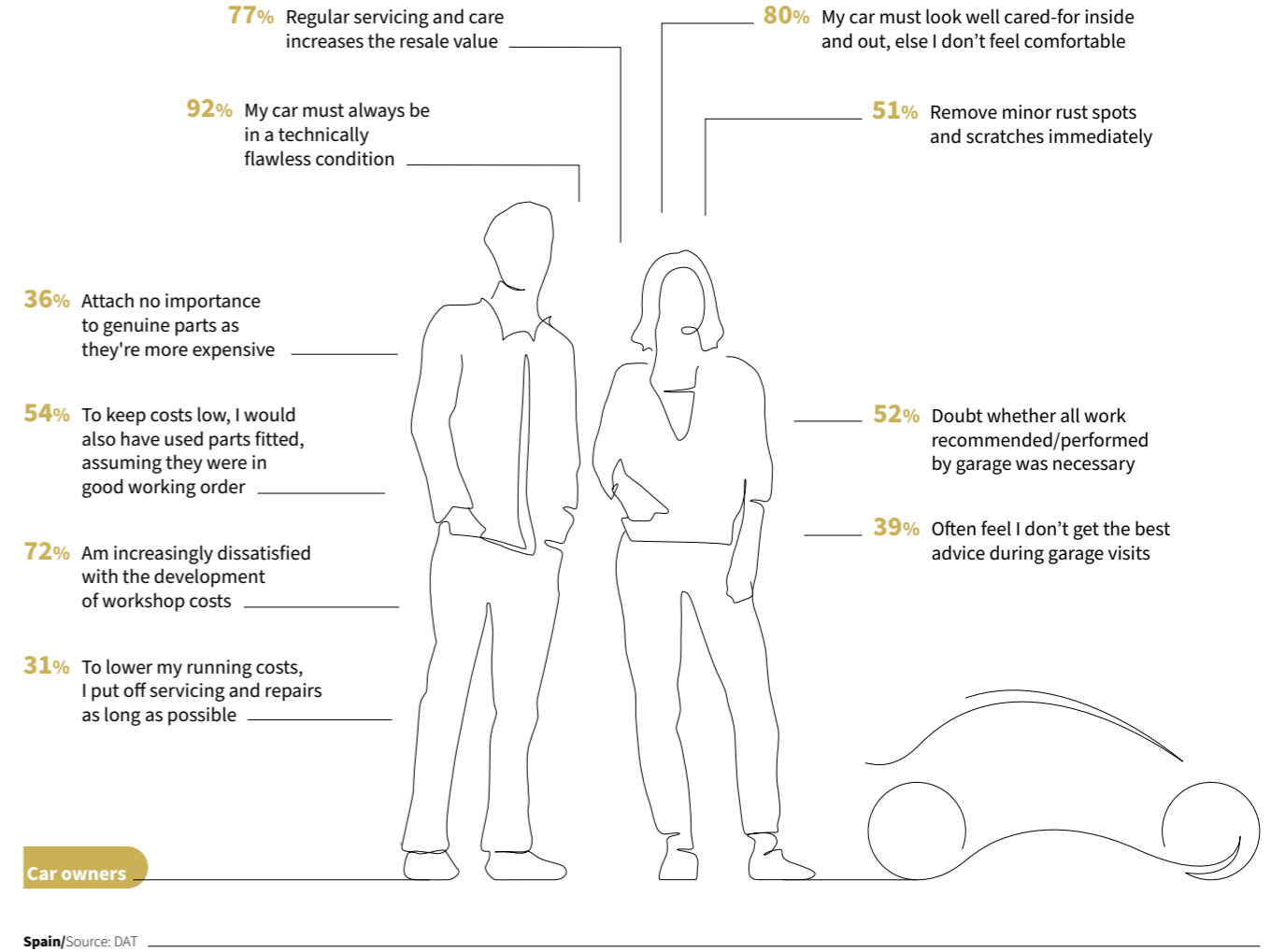
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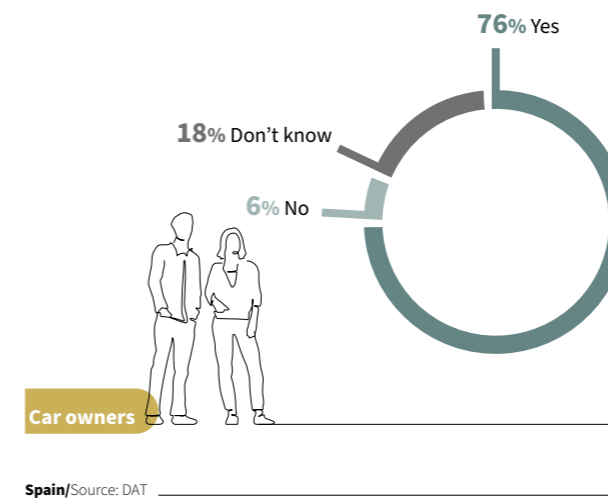
Only slightly over 40% of car owners in Spain have seen Chinese cars on their roads, a relatively low figure compared to other countries. However, 40% of those surveyed could imagine buying a Chinese car – the highest figure compared to other countries. Spain has its own auto-

motive industry, but at 55%, the surveyed car owners show the least support for established car brands. At 46%, confidence that established brands can compete with Chinese manufacturers is the second lowest in the comparison. Only 26% fear the potential further processing of their data in China, also a very low figure.

W15 Statements by car owners on value retention, workshop and care 2025



W13 Self-assessment: documenting of damage by smartphone 2025

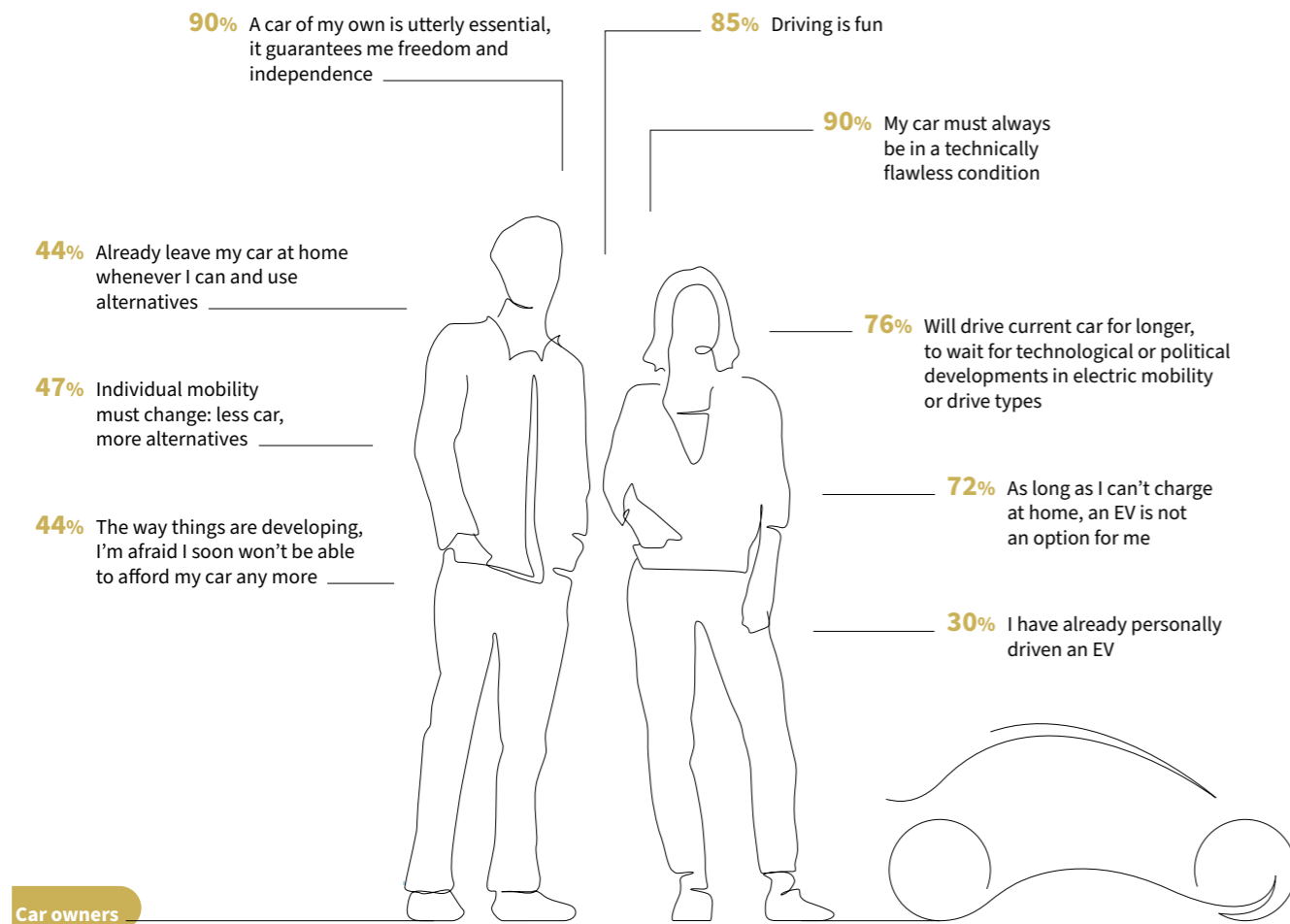


The age of the car fleet in Spain has consequences for car owners' workshop habits. Regular maintenance is considered less necessary, and rust spots and scratches are repaired less frequently than in other markets. Nevertheless, Spanish car owners value a clean car, both inside and out. 72% of respondents were dissatisfied with the development of repair and inspection costs, a very high figure compared internationally, surpassed only by France and Norway. A decline in trust in workshops is also evident, with over 50% doubting the work recommended by the workshop, and almost 40% feeling they are not receiving optimal advice during workshop visits. 76% of car owners were confident in documenting damage using their smartphones, a top figure internationally.





A2 The car owner and his relationship with the car 2025



Germany/Source: DAT

81%

Having a car is indispensable to me to ensure my mobility in day-to-day life.

16%

I would consider a car-sharing scheme as an alternative to owning a car.

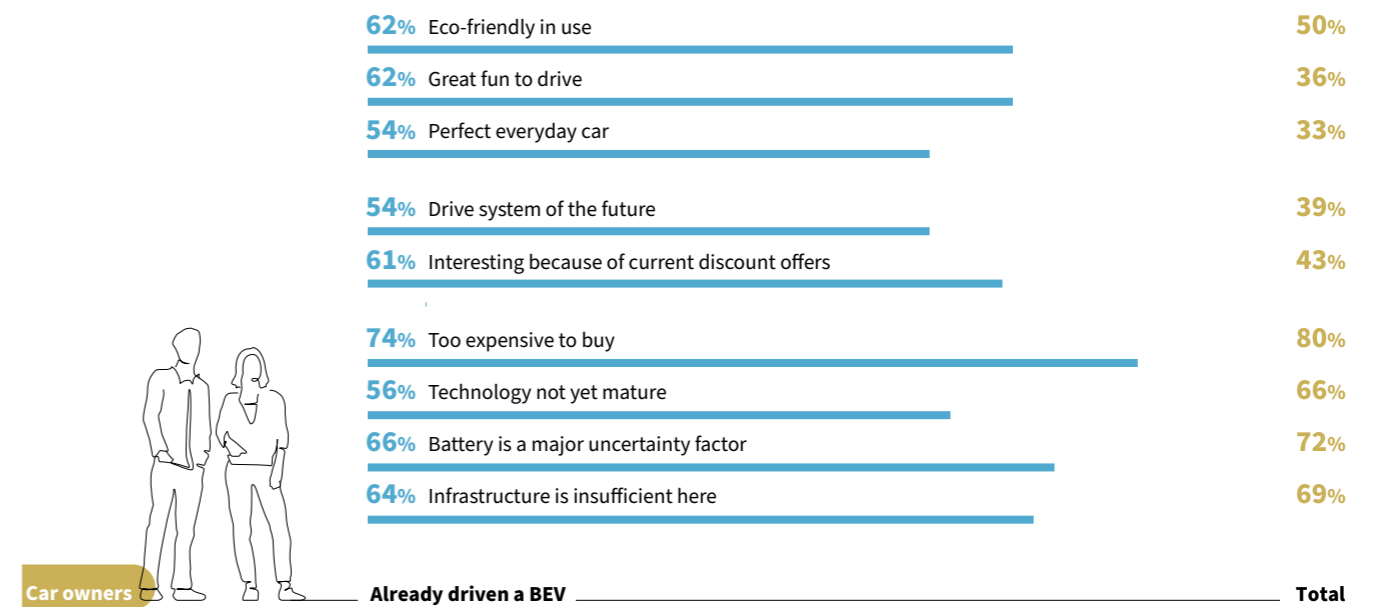
Owning a car is caught in a complex web of emotions, cost pressures, and the development of electric mobility. The availability of private charging for electric vehicles is becoming a deciding factor for or against electric mobility. Therefore, many car owners are waiting to see how the situation surrounding alternative drive systems develops. Crucially, over 80% of all private car owners rely on their own car every day, and only 30% have any experience with an electric vehicle. However, once this experience is gained, the perception of electric mobility changes significantly – less critical. While switching to an electric car may still seem a long way off for many, it is becoming increasingly conceivable. This is especially true for those who have already driven an electric car themselves.

E1 Experience of BEVs 2025



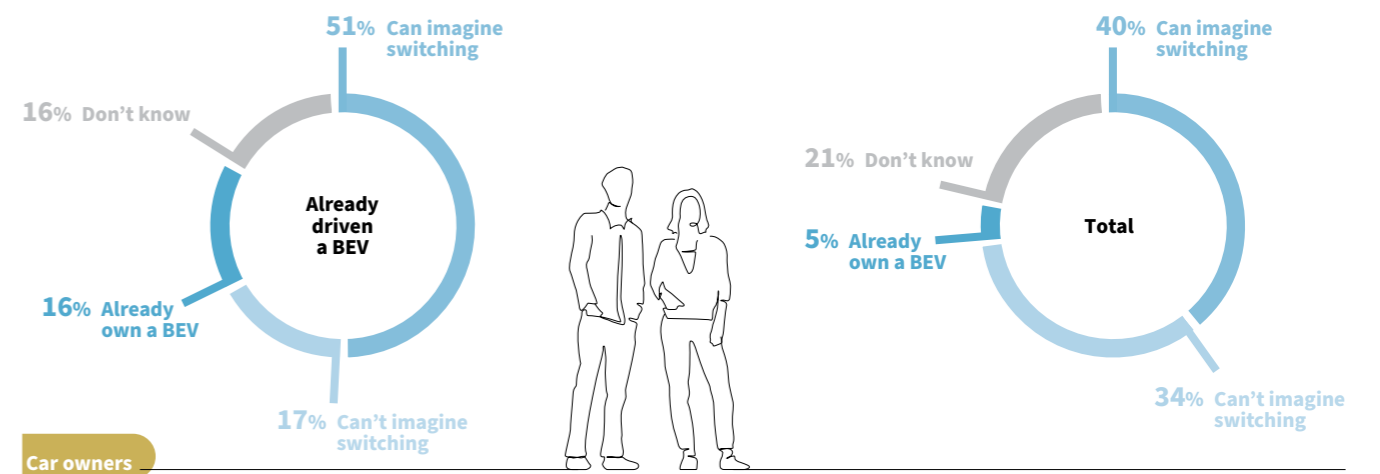
Germany/Source: DAT

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Germany/Source: DAT

E5 BEVs: car owners' plans to go electric

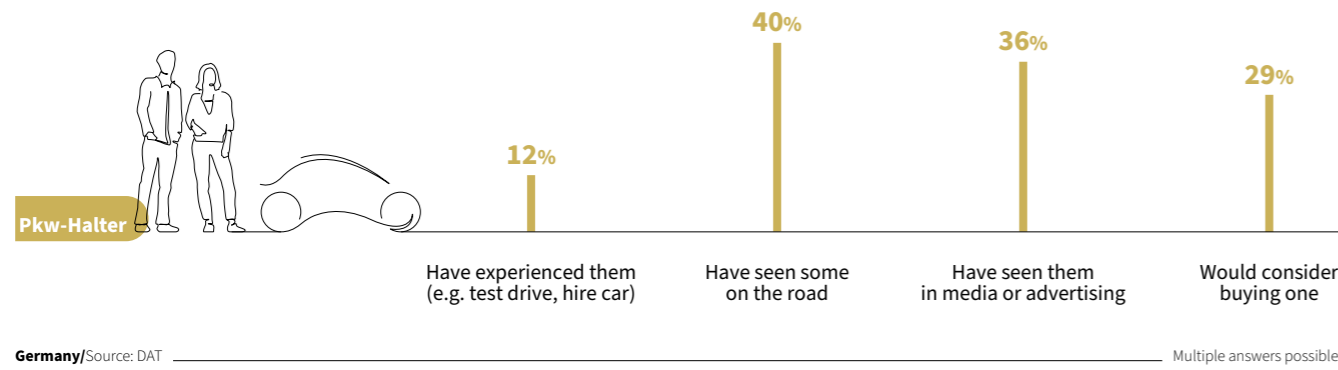


Germany/Source: DAT

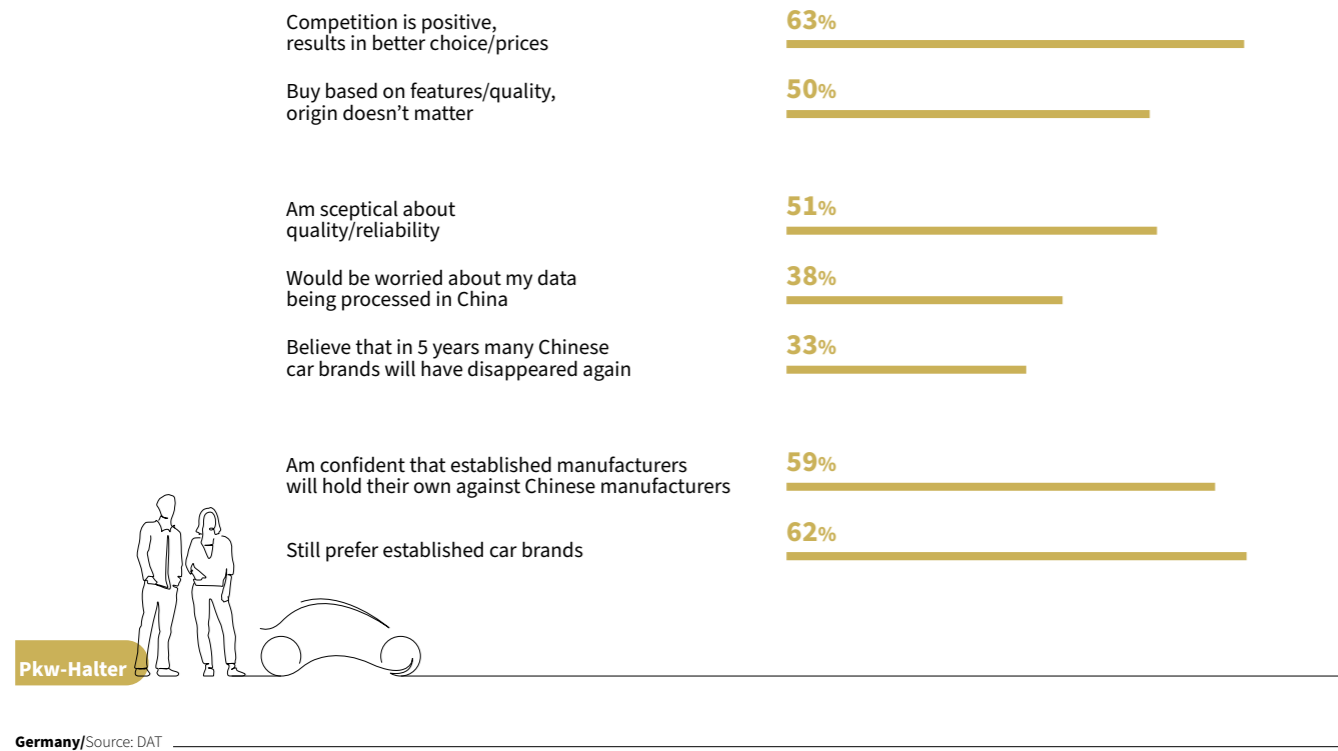




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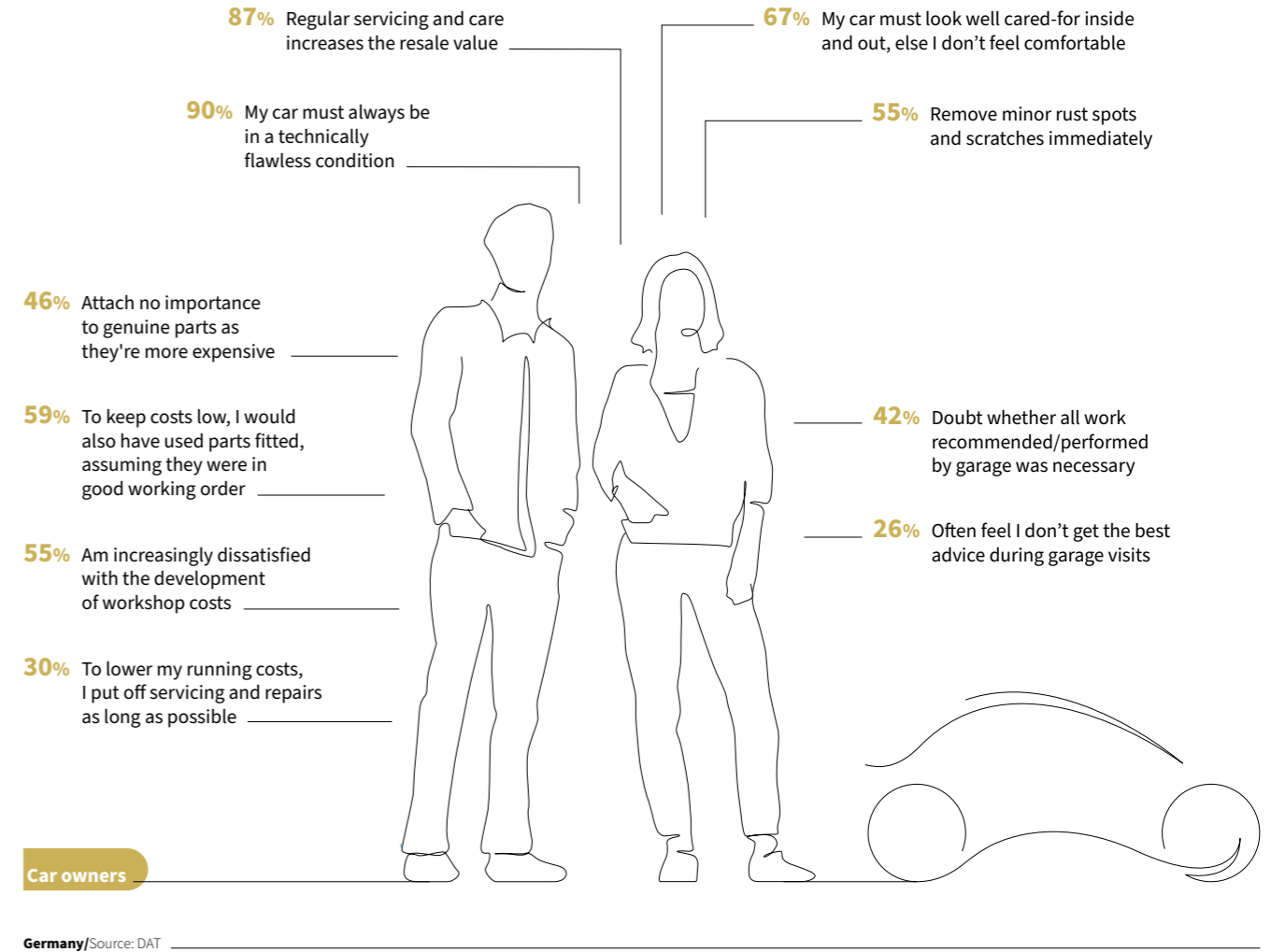
E8 Statements on the topic of Chinese car brands in 2025



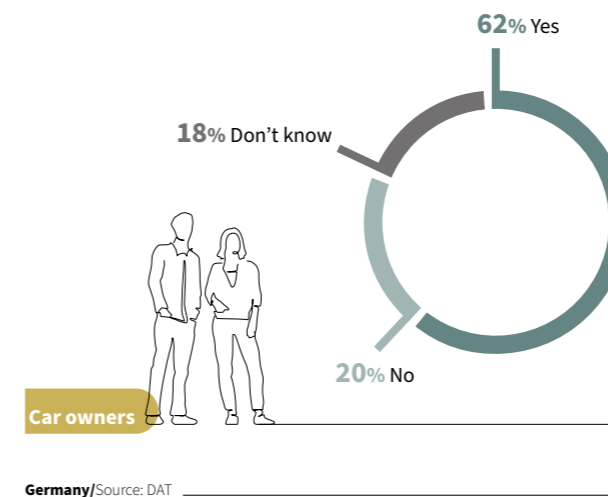
Chinese manufacturers are increasingly entering the automotive market. While their production volume is still relatively small, they are gaining traction on the roads and in the media. Many private car owners welcome this new competitive landscape with European manufactur-

ers, hoping for price advantages. However, they remain sceptical about data processing and overall quality. Nearly 30% of private car owners would consider purchasing a Chinese vehicle, but the majority currently still prefer established brands.

W15 Statements by car owners on value retention, workshop and care 2025



W13 Self-assessment: documenting of damage by smartphone 2025



People's relationship with their cars is heavily influenced by the rising costs of maintenance and repairs at auto repair shops. Nevertheless, 90% of all private car owners still place great importance on their vehicle being in perfect working order. However, scepticism towards their traditional repair shop is already noticeable in several areas, and the question is to what extent a tipping point has been reached where people change their behaviour. Many, for example, would have used parts installed to save money. Interestingly, almost two-thirds of all car owners feel capable of documenting vehicle damage themselves using their smartphones in the event of an accident and sending this documentation to their insurance company.



Market overview 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Annual income in EUR	52,116 ¹	42,229	39,127	68,420 ²	29,786 ³	40,738	41,112 ¹
Average car age	8.7	9.5	9.3	9.5	11.7	11.2	9.5
Annual kilometers covered	13,815	13,568	13,686	13,992	15,202	12,997	13,140
Average amount of cars per household	1.6	1.4	1.5	1.5	1.5	1.5	1.4
Home situation in percent							
Small town (pop. <20k)	62	53	38	40	30	24	41
Mid-sized town (pop. 20k to <100k)	9	29	34	34	27	26	29
Large city (pop. 100k+)	29	18	28	26	43	50	30
Public transport in percent							
Very well-developed	26	21	10	18	24	17	16
Well-developed	38	45	39	42	49	46	45
Poorly developed	23	19	35	25	20	24	27
Very poorly developed	13	15	16	15	7	13	12
Car population Mio. (2024)	5	40	41	3	20	26	49
Drive types in percent							
Petrol engine	41	40	43	24	63	38	60
Diesel engine	47	49	40	35	22	52	28
Plug-in Hybrid (PHEV)	3	2	2	7	1	1	2
Electric motor (BEV)	4	3	2	27	1	1	4
Others	5	6	13	7	13	8	6

Sources: DAT/Statistik Austria, AAA DATA, ACI Gov, SSB, Statistics Poland, ANFAC, KBA ¹Net household income (after deduction of taxes) ²converted (from crowns as of February 28, 2026) ³converted (from zlotys as of February 28, 2026)

A2 The car owner and his relationship with the car 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Driving is fun	81	86	86	88	91	83	85
My car must always be in a technically flawless condition	90	92	86	77	87	92	90
A car of my own car is utterly essential, it guarantees me freedom and independence	88	94	93	93	91	93	90
Already leave my car at home whenever I can and use alternatives	49	53	63	53	51	56	44
Individual mobility must change: less cars, more alternatives	52	60	70	46	52	59	47
The way things are developing, I'm afraid I soon won't be able to afford my car any more	24	44	38	42	47	43	44
I have already personally driven an electric vehicle	38	31	26	59	25	27	30
As long as I can't charge at home, an electric vehicle is not an option for me	72	62	63	39	50	61	72
Will drive my current car for longer, to wait for technological or political developments in electric mobility or drive types	74	77	76	77	62	74	76

Source: DAT

Private ownership necessity 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Having a car is indispensable to me to ensure my mobility in day-to-day life	73	85	77	76	77	75	81
I would consider a car-sharing scheme as an alternative to owning a car	20	36	37	28	34	40	16

Source: DAT

E1 Experience of BEVs 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Already driven a BEV	38	31	26	59	25	27	30
Never driven a BEV	62	69	74	41	75	73	70

Source: DAT

E2 BEVs: assessments of car owners 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Total							
Eco-friendly in use	54	55	56	57	52	60	50
Great fun to drive	40	44	37	50	40	37	36
Perfect everyday car	37	52	55	65	35	48	33
Drive system of the future	36	41	43	52	41	38	39
Interesting because of current discount offers	43	42	58	53	54	66	43
Too expensive to buy	78	86	79	55	77	81	80
Technology not yet mature	66	65	66	56	65	78	66
Battery is a major uncertainty factor	75	79	66	63	71	81	72
Infrastructure is insufficient here	52	65	68	46	71	80	69
Already driven a BEV							
Eco-friendly in use	64	66	64	68	63	71	62
Great fun to drive	65	66	62	68	64	62	62
Perfect everyday car	56	68	66	79	53	63	54
Drive system of the future	52	58	56	65	59	52	54
Interesting because of current discount offers	55	57	72	61	70	76	61
Too expensive to buy	70	82	73	49	70	74	74
Technology not yet mature	50	59	57	46	64	73	56
Battery is a major uncertainty factor	63	76	67	58	70	78	66
Infrastructure is insufficient here	44	68	68	48	74	82	64

Source: DAT



E5 BEVs: car owners' plans to go electric

	Austria	France	Italy	Norway	Poland	Spain	Germany
Total							
Can imagine switching	45	46	51	40	40	47	40
Can't imagine switching	27	23	23	12	24	24	34
Already own a BEV	8	5	2	32	1	2	5
Don't know	20	26	24	16	35	27	21
Already driven a BEV							
Can imagine switching	51	55	66	34	67	58	51
Can't imagine switching	14	12	14	5	14	15	17
Already own a BEV	20	13	7	52	4	7	16
Don't know	15	20	13	9	15	20	16

Source: DAT/KBA

E7 Statements on Chinese manufacturers' cars 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Have experienced them (e.g. test drive, hire car)	11	12	14	16	13	10	12
Have seen some on the road	64	40	42	50	49	42	40
Have seen them in media or advertising	56	29	34	39	37	37	36
Would consider buying one	31	27	41	37	38	40	29

Source: DAT Multiple answers possible

E8 Statements on the topic of Chinese car brands in 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Competition is positive, results in better choice/prices	67	62	66	68	69	76	63
Buy based on features/quality, origin doesn't matter	54	50	56	57	50	70	50
Am sceptical about quality/reliability	46	51	45	47	52	48	51
Would be worried about my data being processed in China	33	41	28	42	35	26	38
Believe that in 5 years many Chinese car brands will have disappeared again	22	36	31	40	32	31	33
Am confident that established manufacturers will hold their own against Chinese manufacturers	44	48	56	58	57	46	59
Still prefer established car brands	63	67	58	70	68	55	62

Source: DAT

W15 Statements by car owners on value retention, workshop and care 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
My car must always be in a technically flawless condition	90	92	86	77	87	92	90
Regular servicing and care increases the resale value	92	87	84	96	86	77	87
Remove minor rust spots and scratches immediately	45	61	53	50	58	51	55
My car must look well cared-for inside and out, else I don't feel comfortable	55	82	74	71	79	80	67
Attach no importance to genuine parts as they're more expensive	56	40	34	48	34	36	46
To keep costs low, I would also have used parts fitted, assuming they were in good working order	61	72	54	68	51	54	59
Am increasingly dissatisfied with the development of workshop costs	62	81	66	74	55	72	55
To lower my running costs, I put off servicing and repairs as long as possible	14	38	36	35	31	31	30
Often feel I don't get the best advice during garage visits	30	44	43	37	42	39	26
Doubt whether all work recommended/performed by garage was necessary	51	56	59	63	53	52	42

Source: DAT

W13 Self-assessment: documenting of damage by smartphone 2025

	Austria	France	Italy	Norway	Poland	Spain	Germany
Yes	69	76	64	70	60	76	62
No	13	11	17	10	12	6	20
Don't know	18	13	19	20	28	18	18

Source: DAT





Deutsche Automobil Treuhand GmbH

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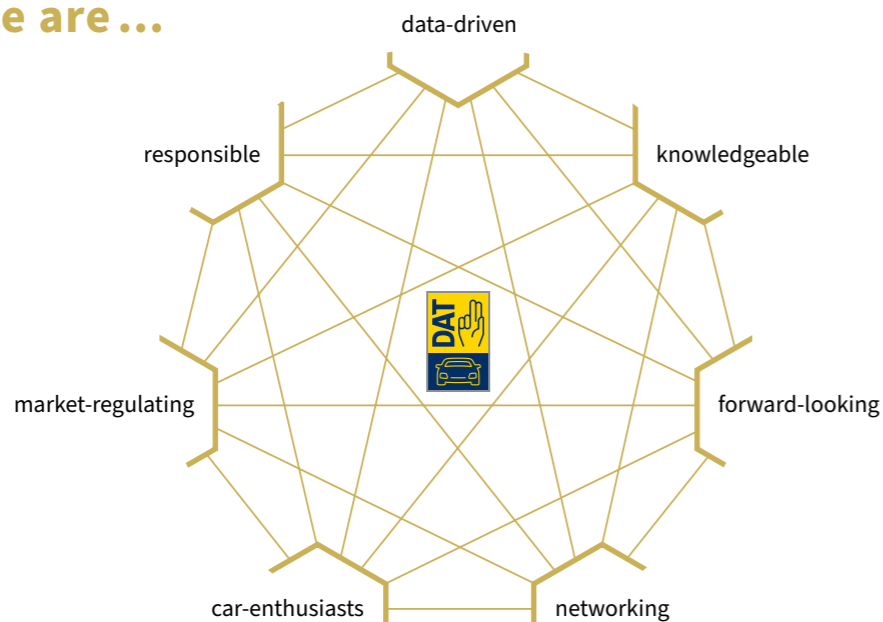
Survey method/time frame

For this selected findings of the DAT Report 2026, a representative survey was conducted by market research institute NIQ GfK in the following seven countries.

Car owners were surveyed (questionnaire via access panel/CAWI) in October 2025. All samples are weighted and therefore representative of private car owners. The sample sizes were as follows: Austria: 1,060, France: 1,043, Germany: 2,068, Italy: 1,059, Norway: 962, Poland: 1,113, Spain: 1,077.

For a more readable style, we have avoided the use of the language forms 'male', 'female', 'other' at the same time. Unless explicitly stated in the text, any terms used to denote persons refer to all genders equally.

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