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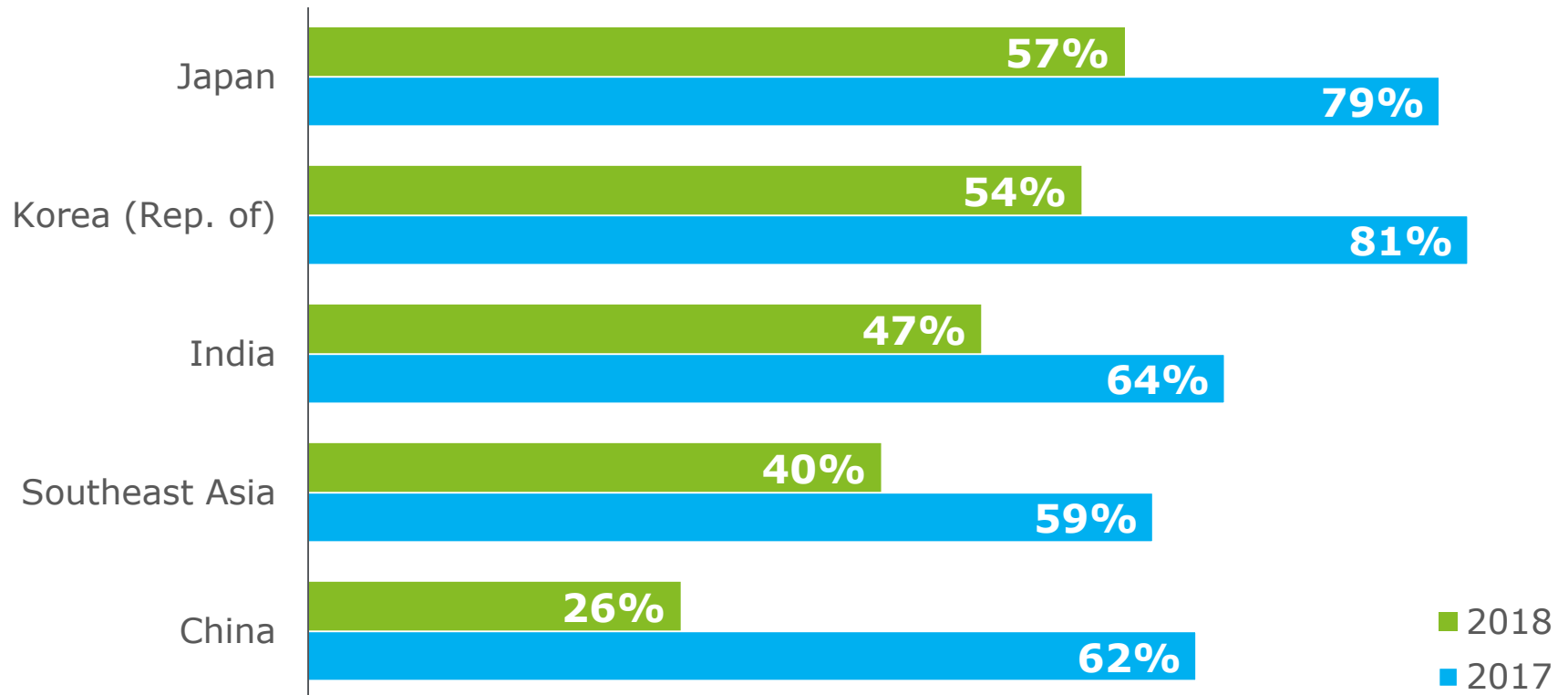


**Consumer views on autonomous and electric powertrain technologies  
Asia Pacific insights from Deloitte's Global Automotive Consumer Study**

June 2018

## Consumers are warming up to the idea of self-driving cars as fewer people believe AVs will not be safe compared to last year.

Percentage of consumers who think fully self-driving vehicles will not be safe

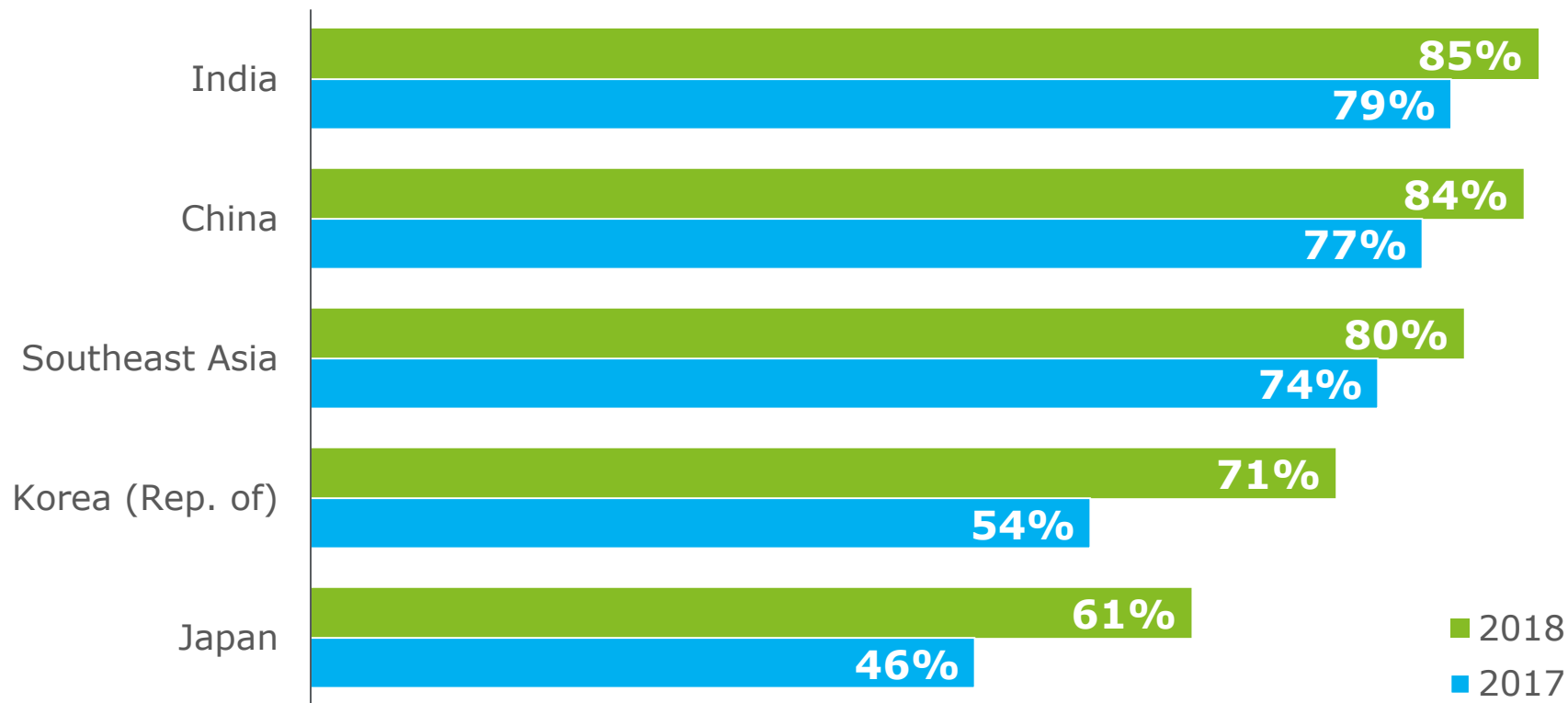


Note: Percentage of respondents who strongly agreed or agreed have been added together. Southeast Asia represents Malaysia, Indonesia and Thailand.

Sample sizes: [2018] Japan=1,677; Korea (Rep. of)=1,727; India=1,727; Southeast Asia = 1,504; China=1,725  
[2017] Japan=1,649; Korea (Rep. of)=1,645; India=1,663; Southeast Asia = 1,437; China=1,650

## More consumers say they would feel more comfortable riding in an autonomous vehicle if it were offered by a brand they trust.

Percentage of consumers who feel they would be more likely to ride in an autonomous vehicle if it were offered by a brand they trust

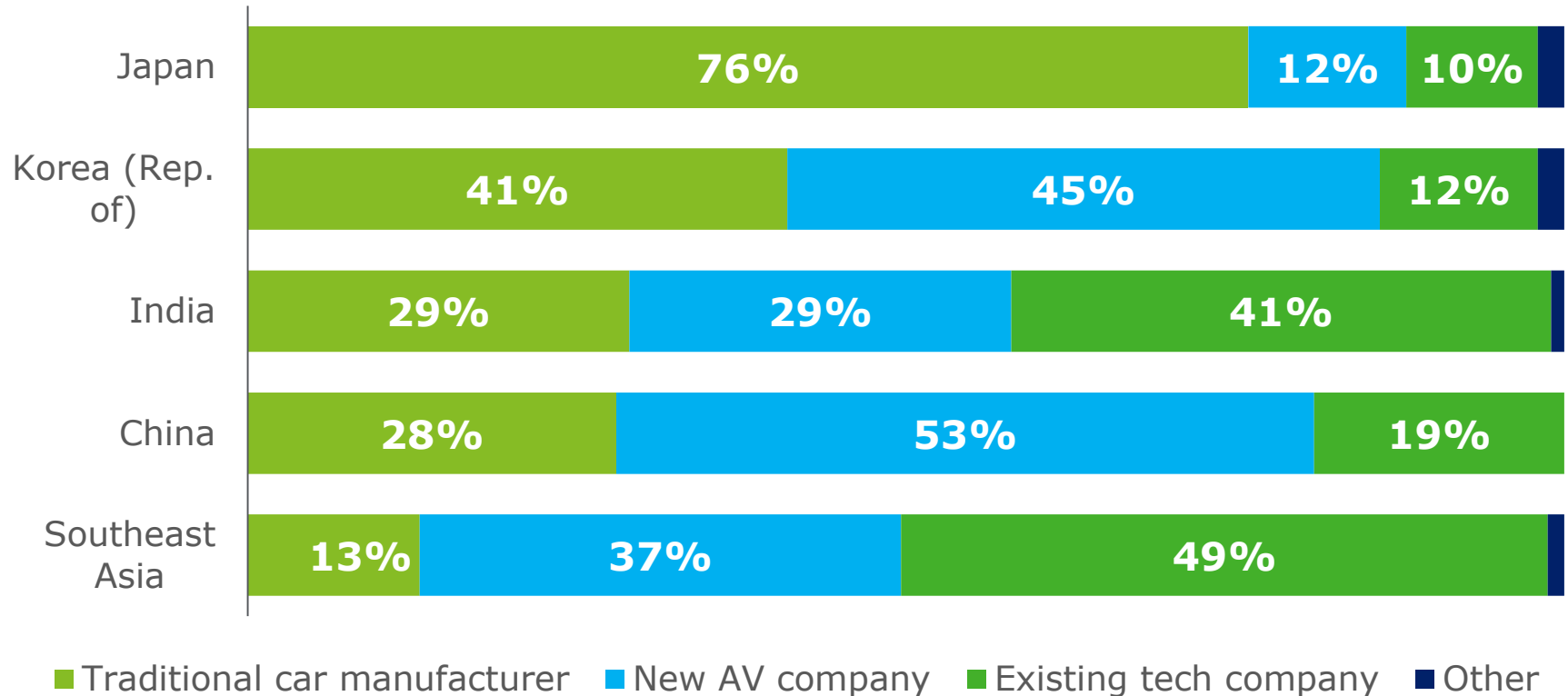


Note: Percentage of respondents who said 'somewhat more likely' or 'significantly more likely' have been added together

Sample sizes: [2018] India=1,720; China=1,726; Southeast Asia = 1,480; Korea (Rep. of)=1,721; Japan=1,625  
[2017] India=1,683; China=1,699; Southeast Asia = 1,443; Korea (Rep. of)=1,687; Japan=1,661

## What type of company do consumers trust most to bring self-driving technology to market?

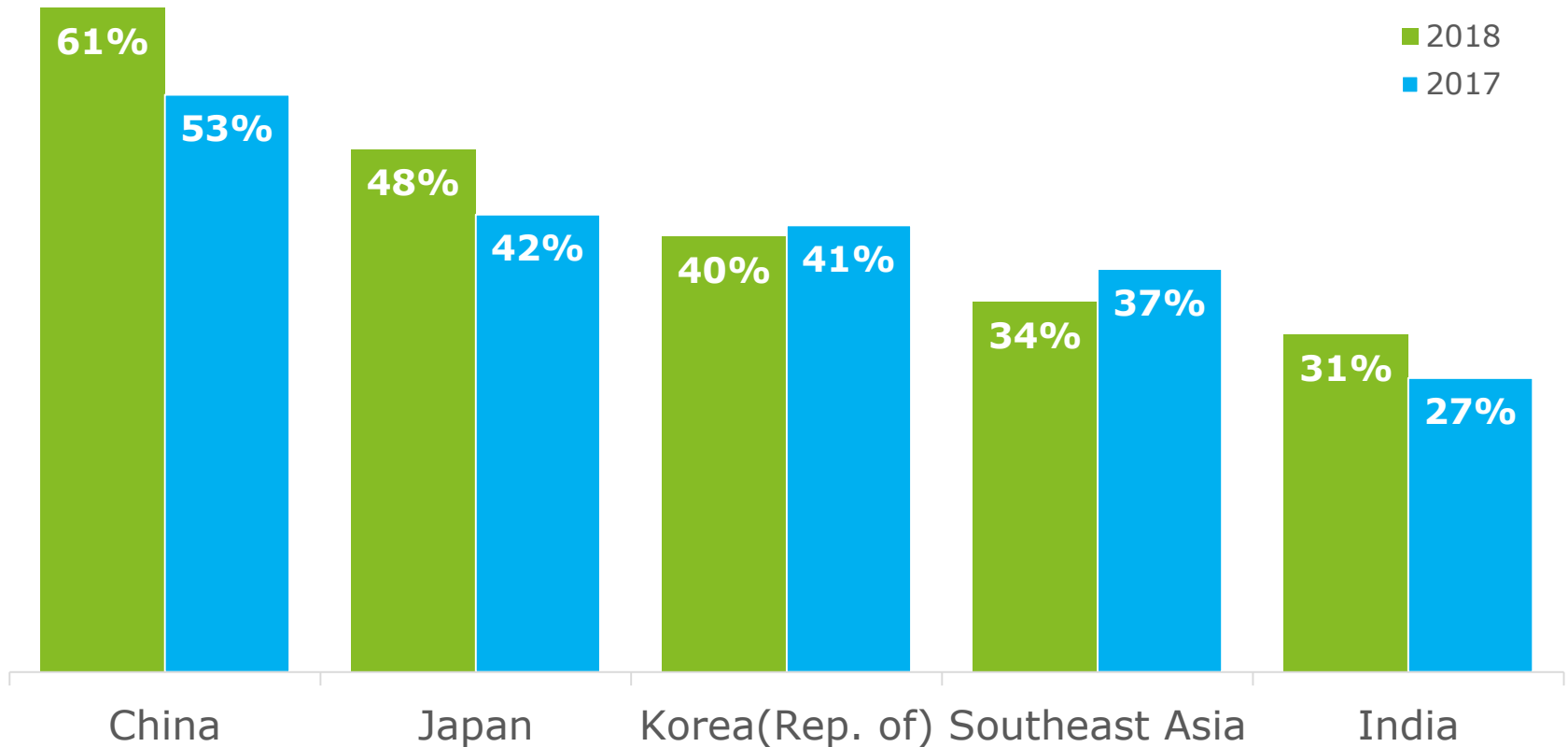
Types of companies consumers trust most to bring fully autonomous technology to market (2018)



Sample size: Japan=1,762; Korea (Rep. of)=1,763; India=1,761; China=1,759; Southeast Asia = 1,523

## China is leading the way in terms of increasing consumer interest in moving to alternative powertrain technologies.

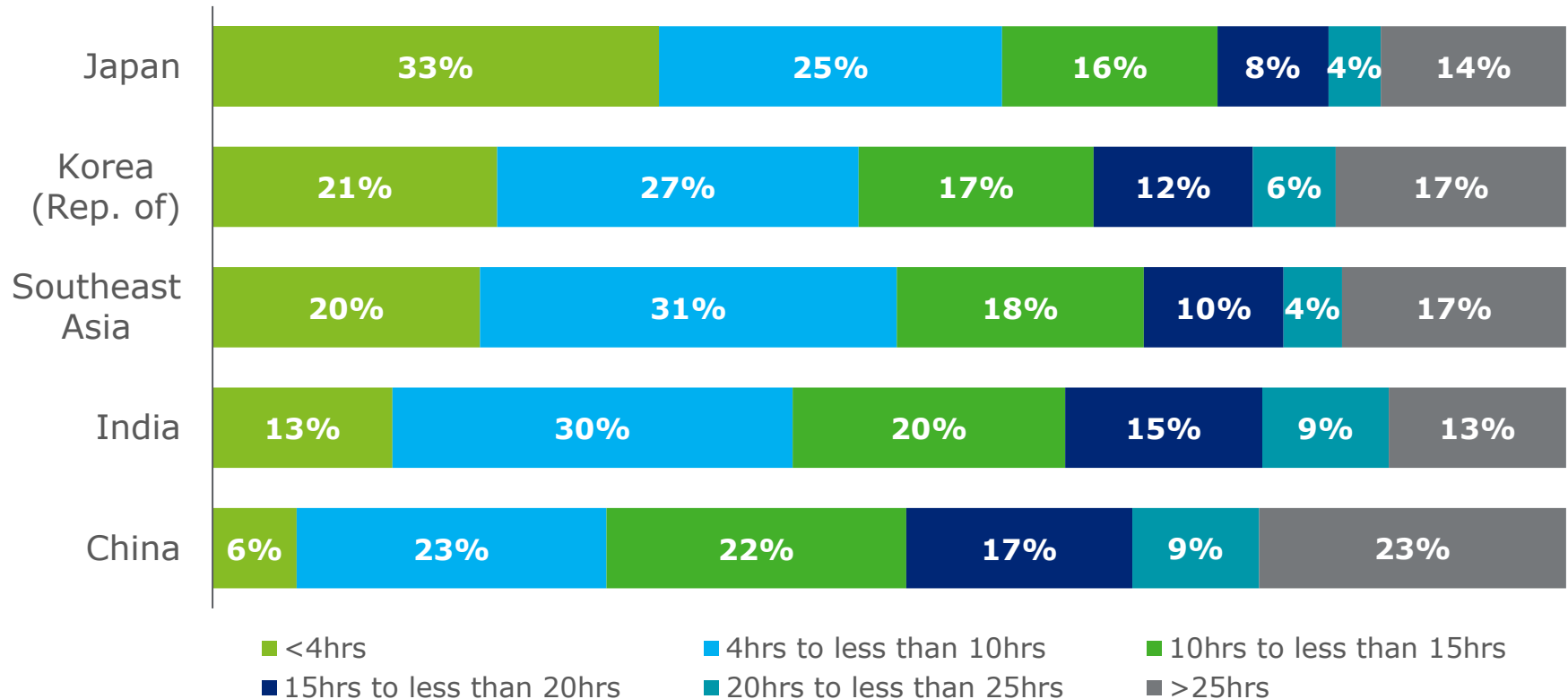
Percentage of consumers who would prefer a hybrid-electric, battery-electric or other form of alternative powertrain in their next vehicle



Sample sizes: [2018] China=1,606; Japan=1,040; Korea (Rep. of)=1,623; Southeast Asia = 1,388; India=1,686  
[2017] China=1,606; Japan=1,040; Korea (Rep. of)=1,475; Southeast Asia = 1,374; India=1,645

**There are big differences between Asia Pacific markets in the time consumers spend researching a vehicle purchase.**

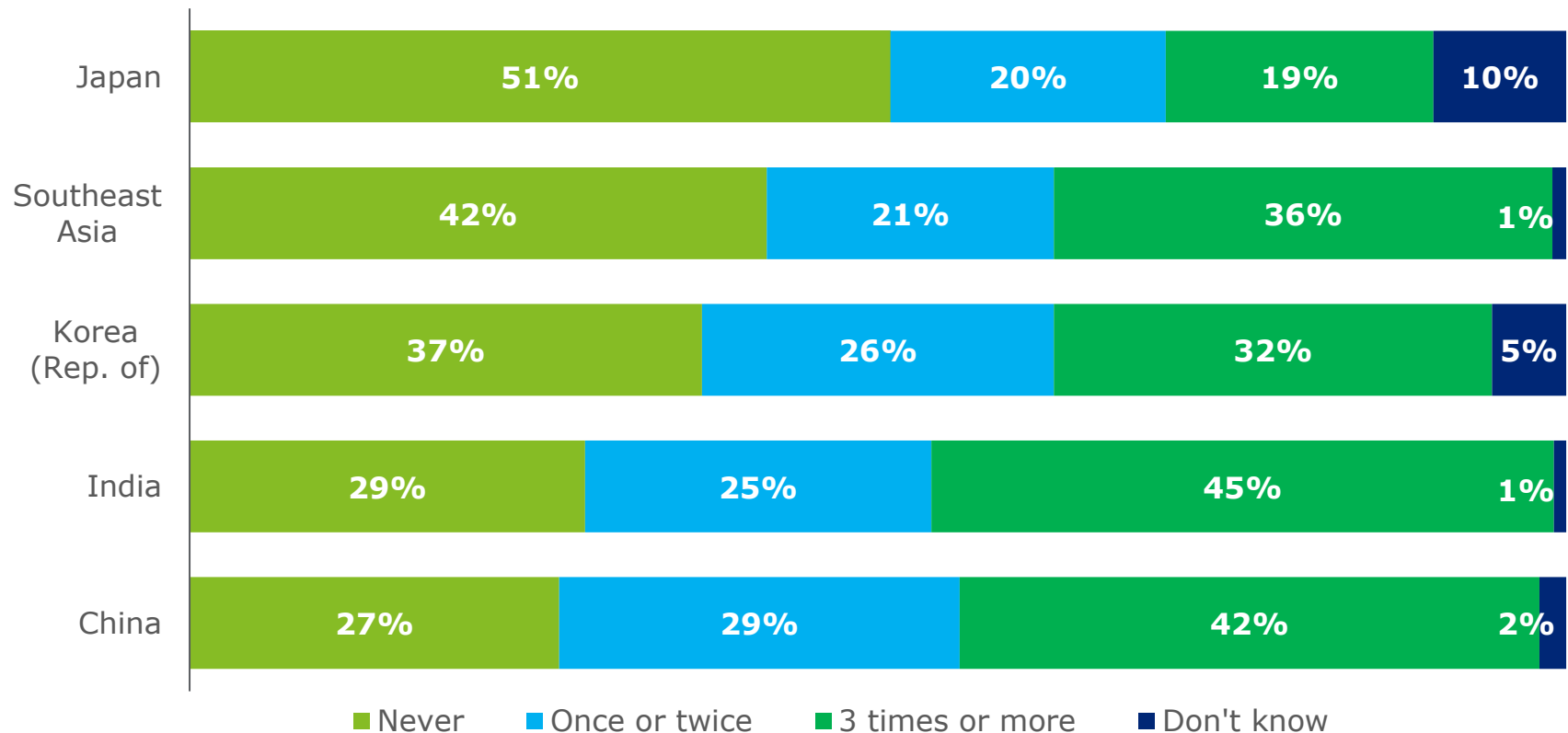
**Number of hours spent researching a vehicle purchase**



Sample size: Japan=1,040; Korea (Rep. of)=1,623; Southeast Asia = 1,250 India=1,686; China=1,606

## Manufacturers may be missing out on a big opportunity to deepen customer relationships through more frequent communication.

Frequency of manufacturer touchpoints with consumers post vehicle purchase



Sample size: Japan=880; Southeast Asia=1,003; Korea (Rep. of)=922; India=1,239; China=1,227

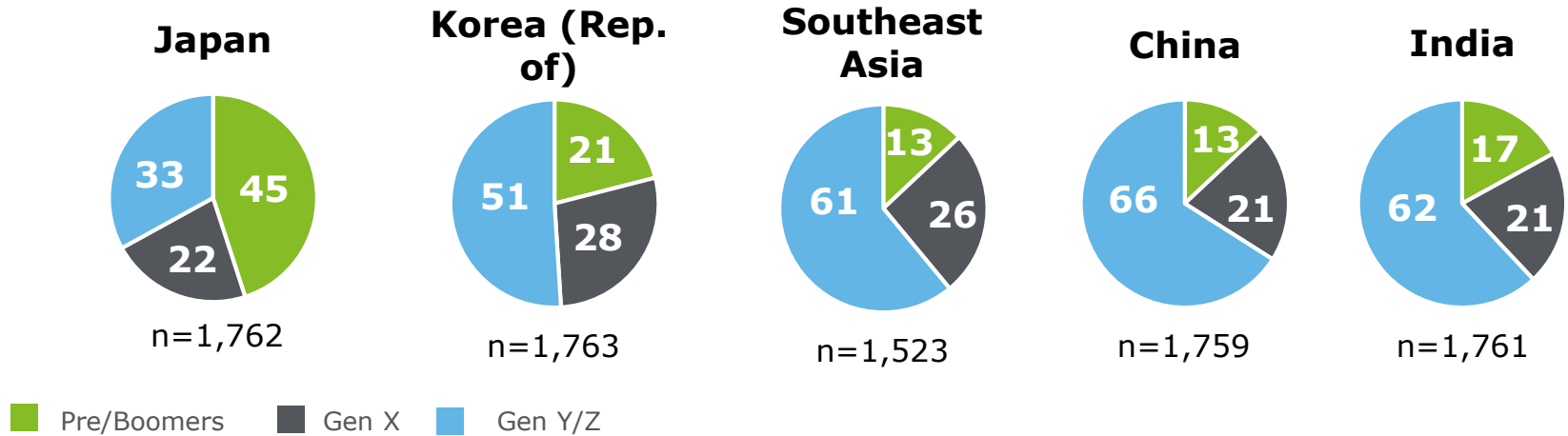
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# About the Deloitte Global Automotive Consumer Study

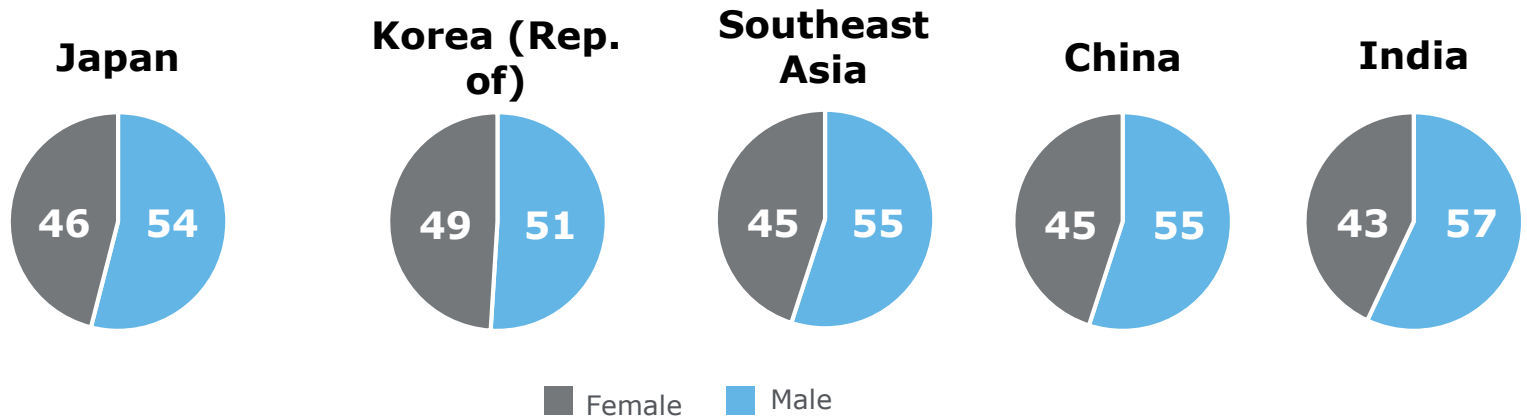


# Study demographics

## Generational Segments (%)

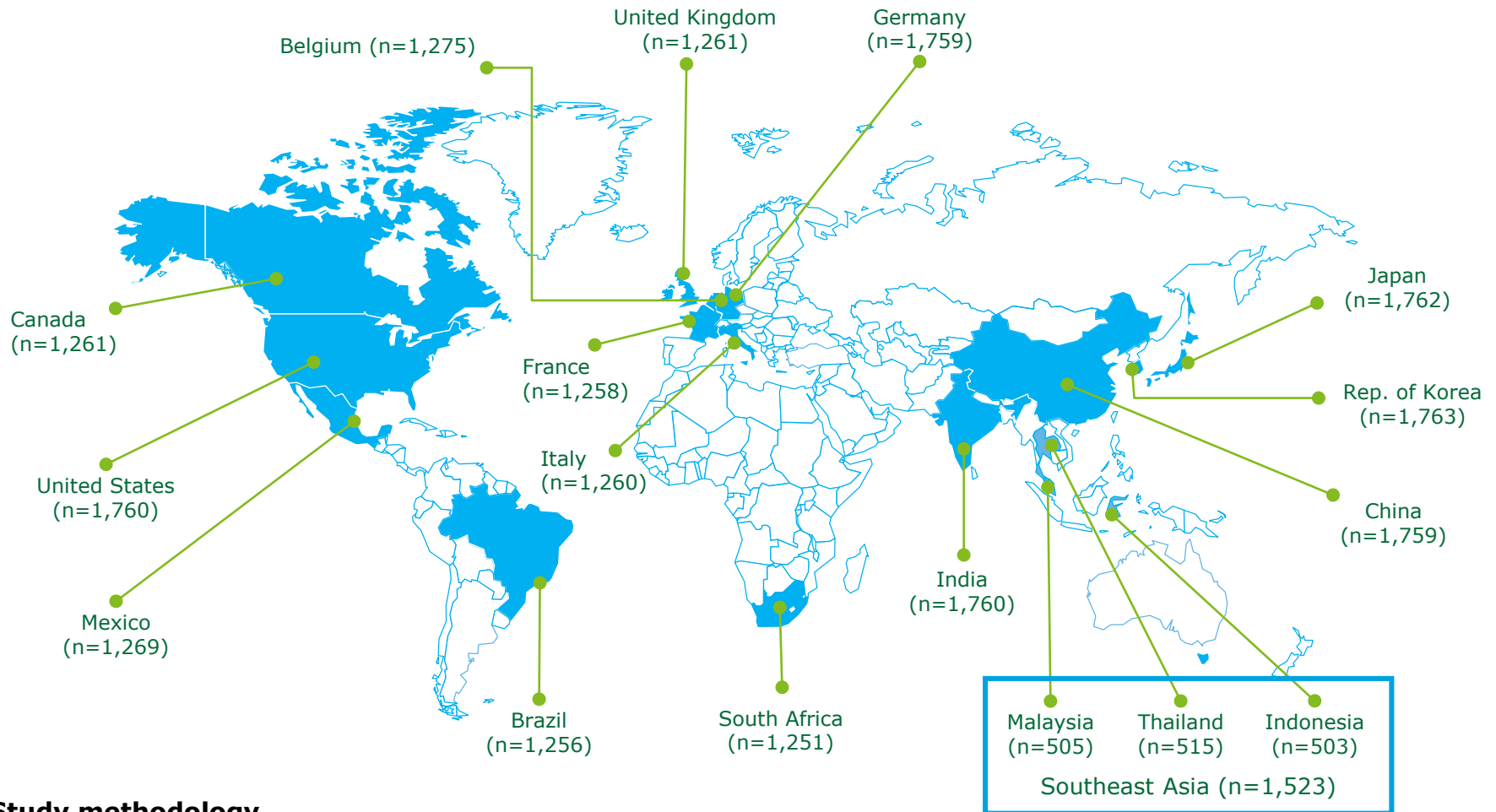


## Gender (%)



Note: Pre/Boomers: Born Before 1965; Gen X: Born Between 1965-1976; Gen Y/Z: Born After 1976 (sample excludes consumers under 16 years of age)

# The 2018 Deloitte Global Automotive Consumer Study includes 22,177 consumer responses across 15 global markets



## Study methodology

The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire (translated into local languages) via email. It was fielded in 17 countries and designed to be nationally representative of the overall population in each country.



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