Deloitte.

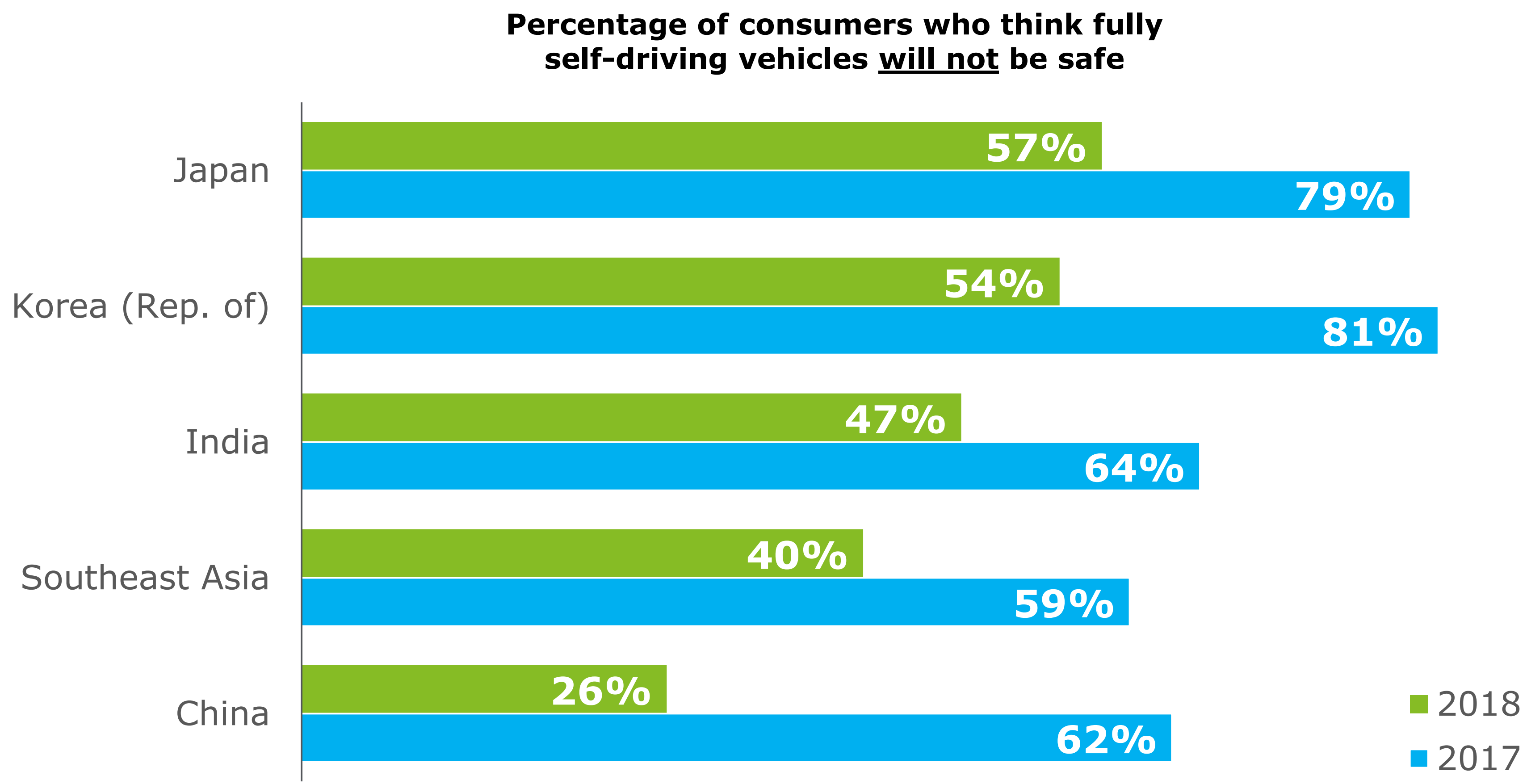
Consumer views on autonomous and electric powertrain technologies

Asia Pacific insights from Deloitte's Global Automotive Consumer Study

June 2018

Deloitte.

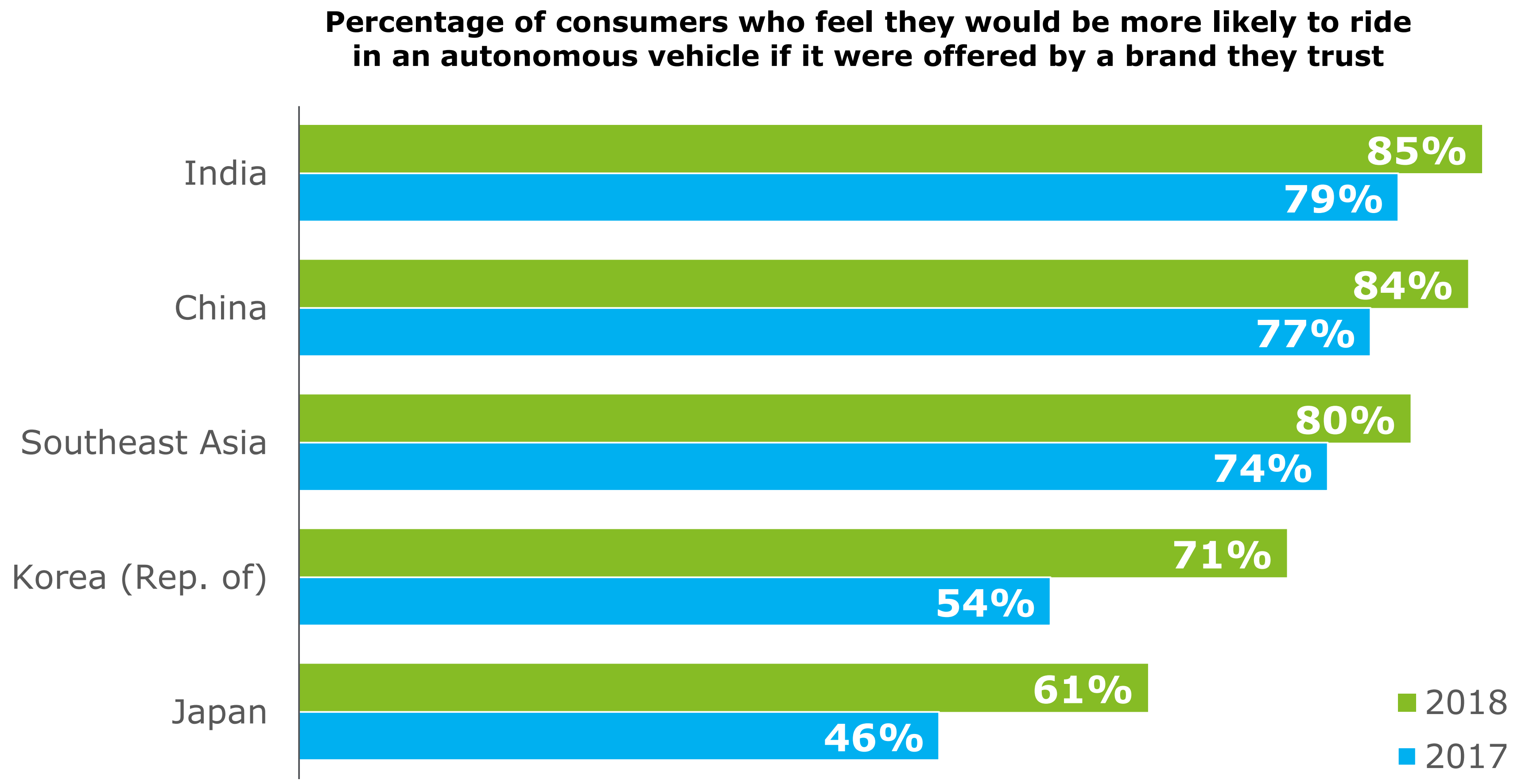
Consumers are warming up to the idea of self-driving cars as fewer people believe AVs will not be safe compared to last year.



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.

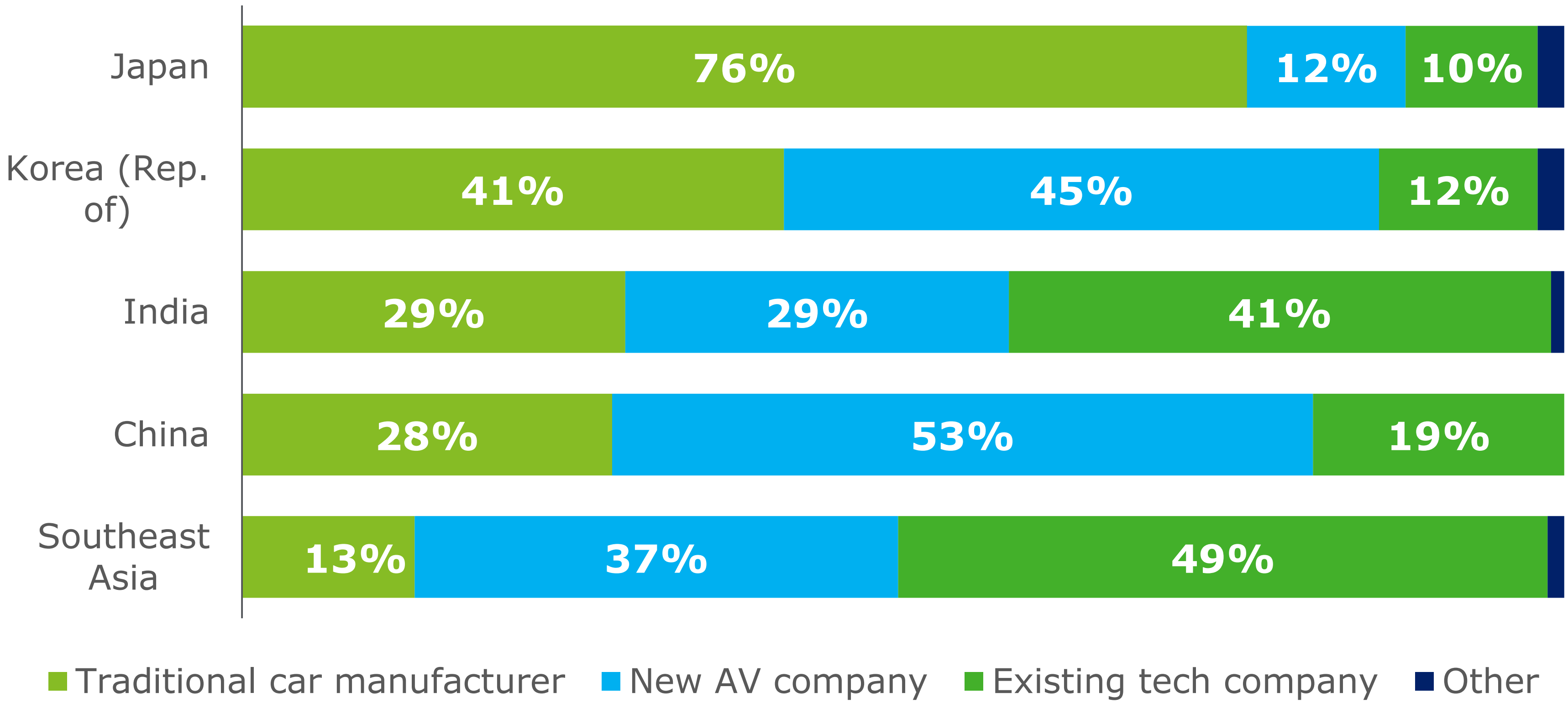


Note: Percentage of respondents who said 'somewhat more likely' or 'significantly more likely' have been added together

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)

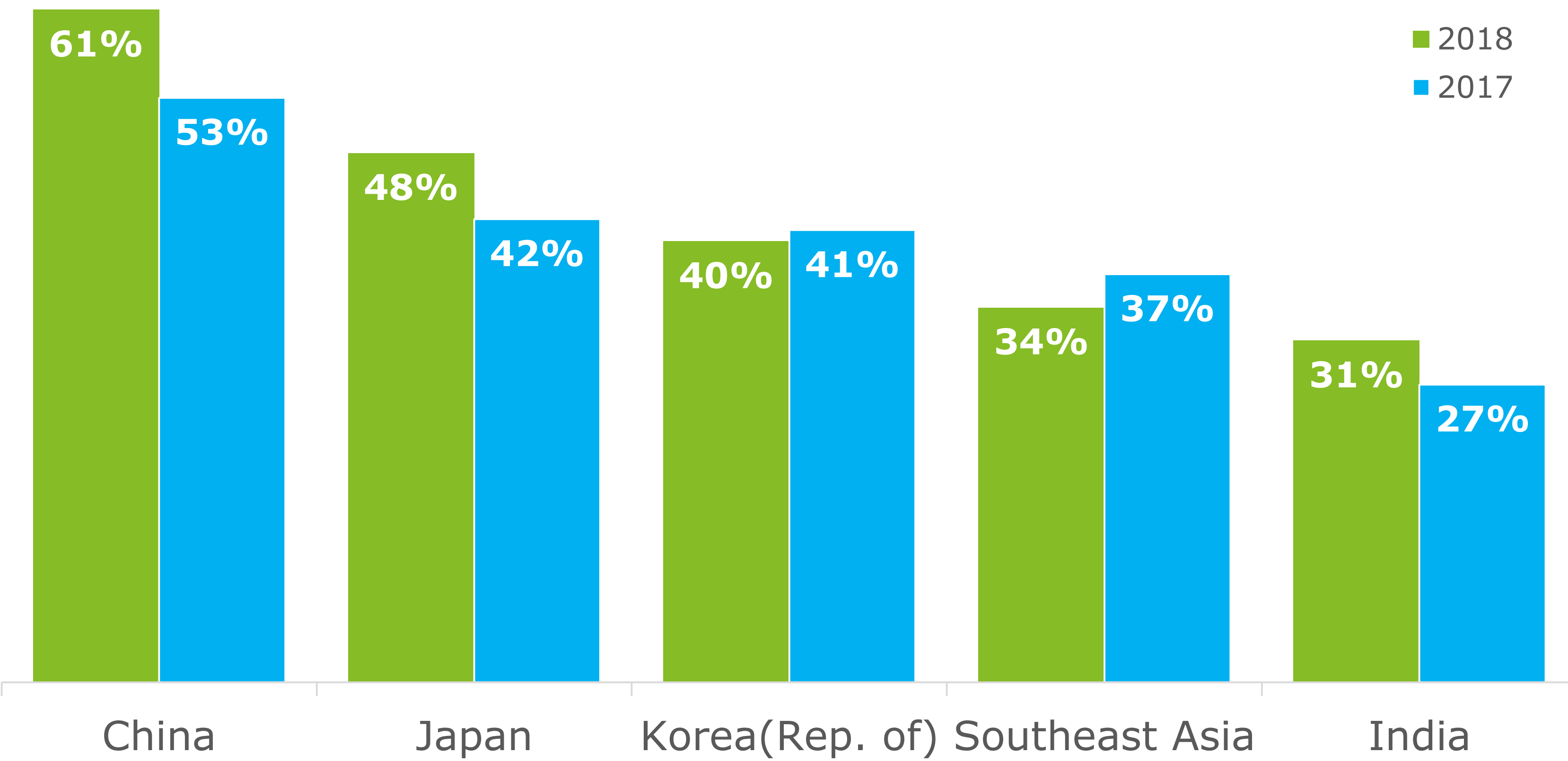


Sample size: Japan=1,762; Korea (Rep. of)=1,763; India=1,761; China=1,759; Southeast Asia = 1,523

Deloitte.

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

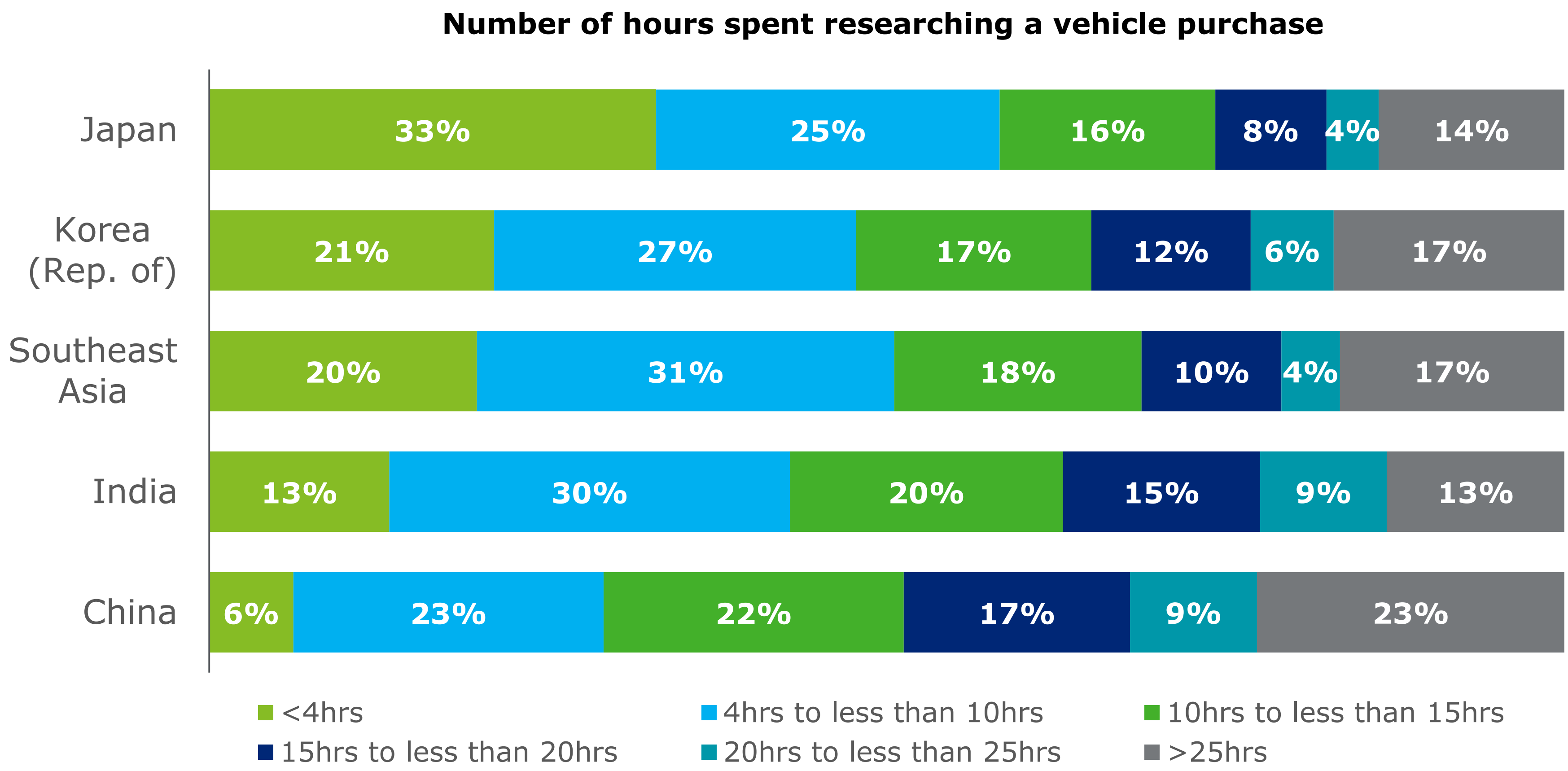
Percentage of consumers who would prefer a hybrid-electric, battery-electric or other form of alternative powertrain in their next vehicle



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

Deloitte.

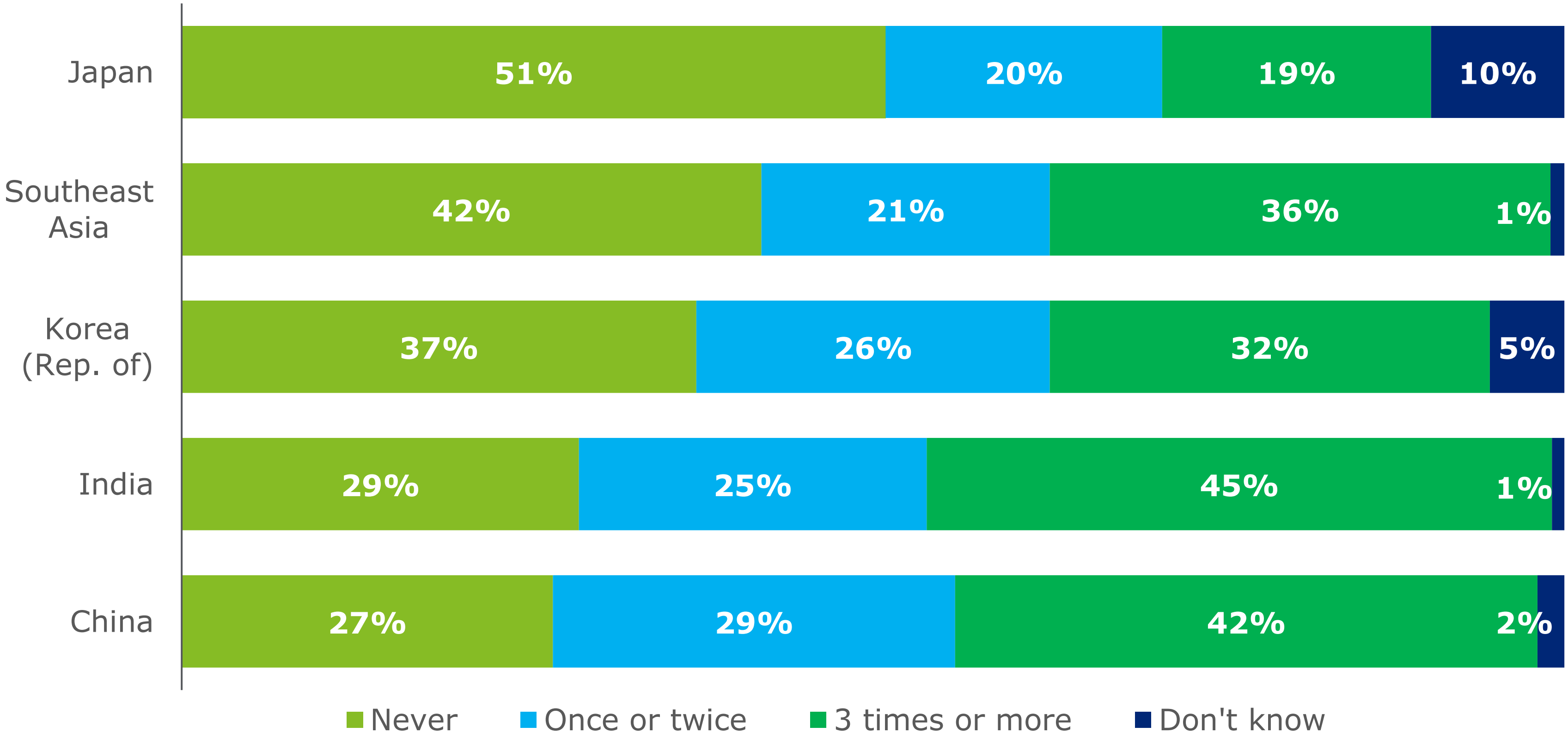
There are big differences between Asia Pacific markets in the time consumers spend researching a vehicle purchase.



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

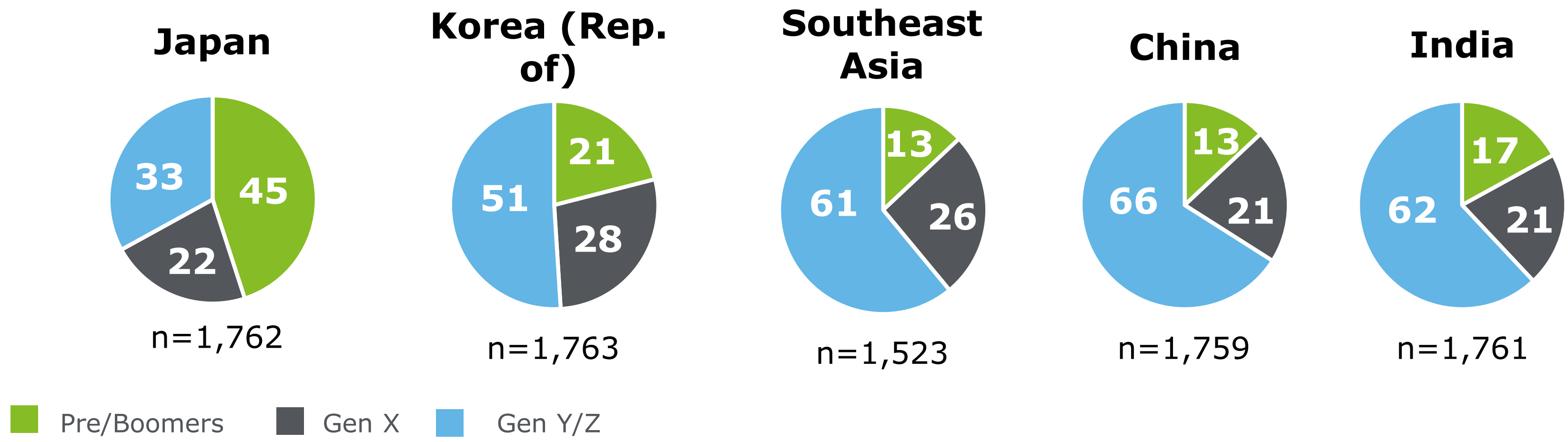


Sample size: Japan=880; Southeast Asia=1,003; Korea (Rep. of)=922; India=1,239; China=1,227

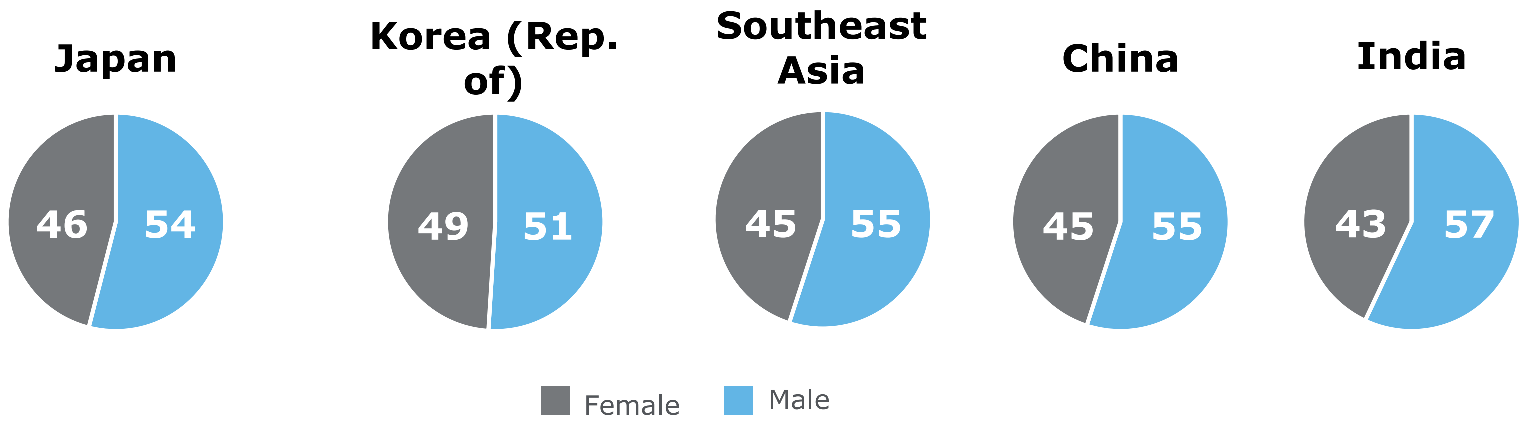
About the Deloitte Global Automotive Consumer Study

Study demographics

Generational Segments (%)



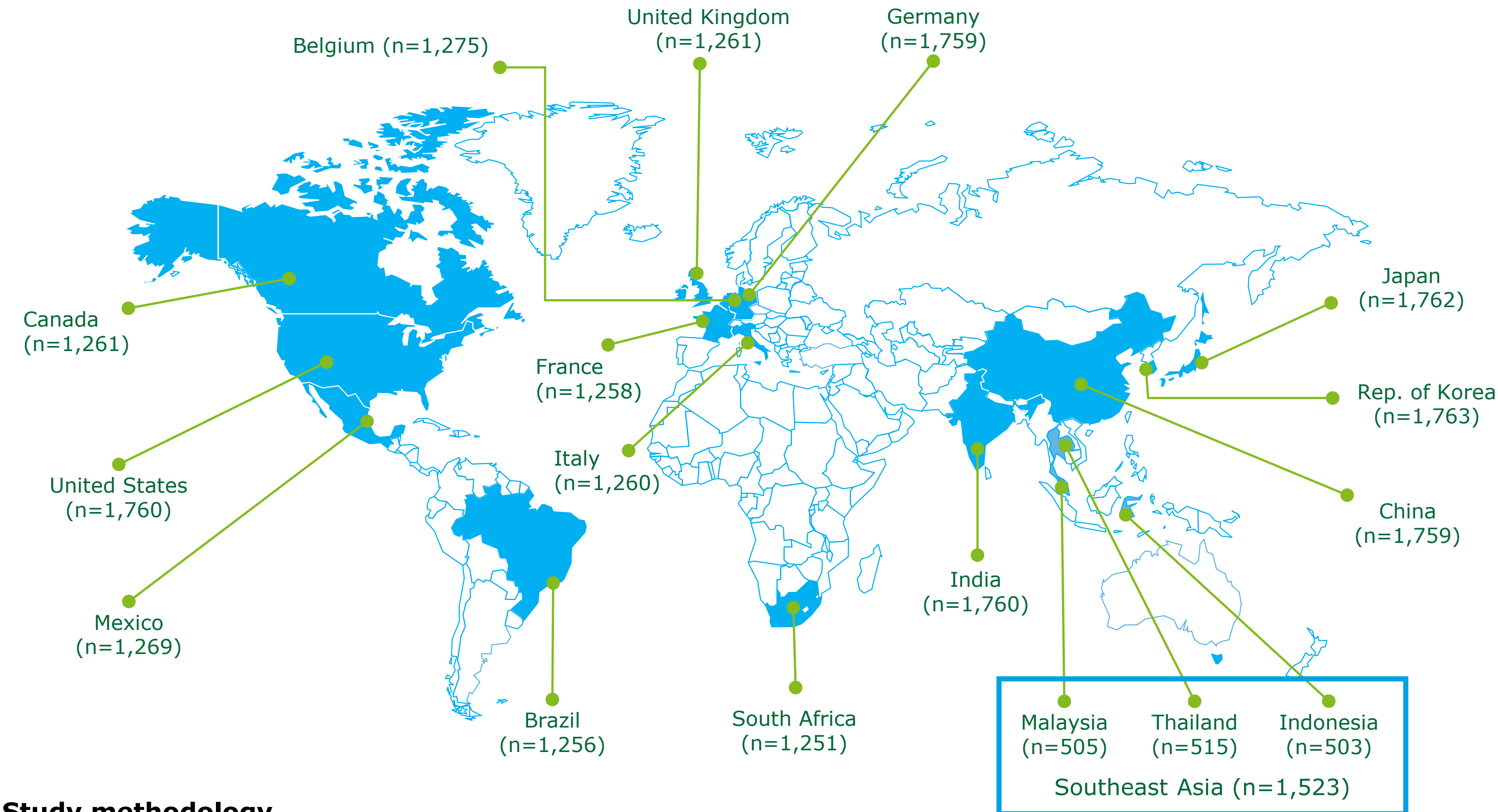
Gender (%)



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)

Source: Global Automotive Consumer Study

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.

Deloitte.

Official Professional Services Sponsor

Professional Services means audit, tax, consulting, and advisory.