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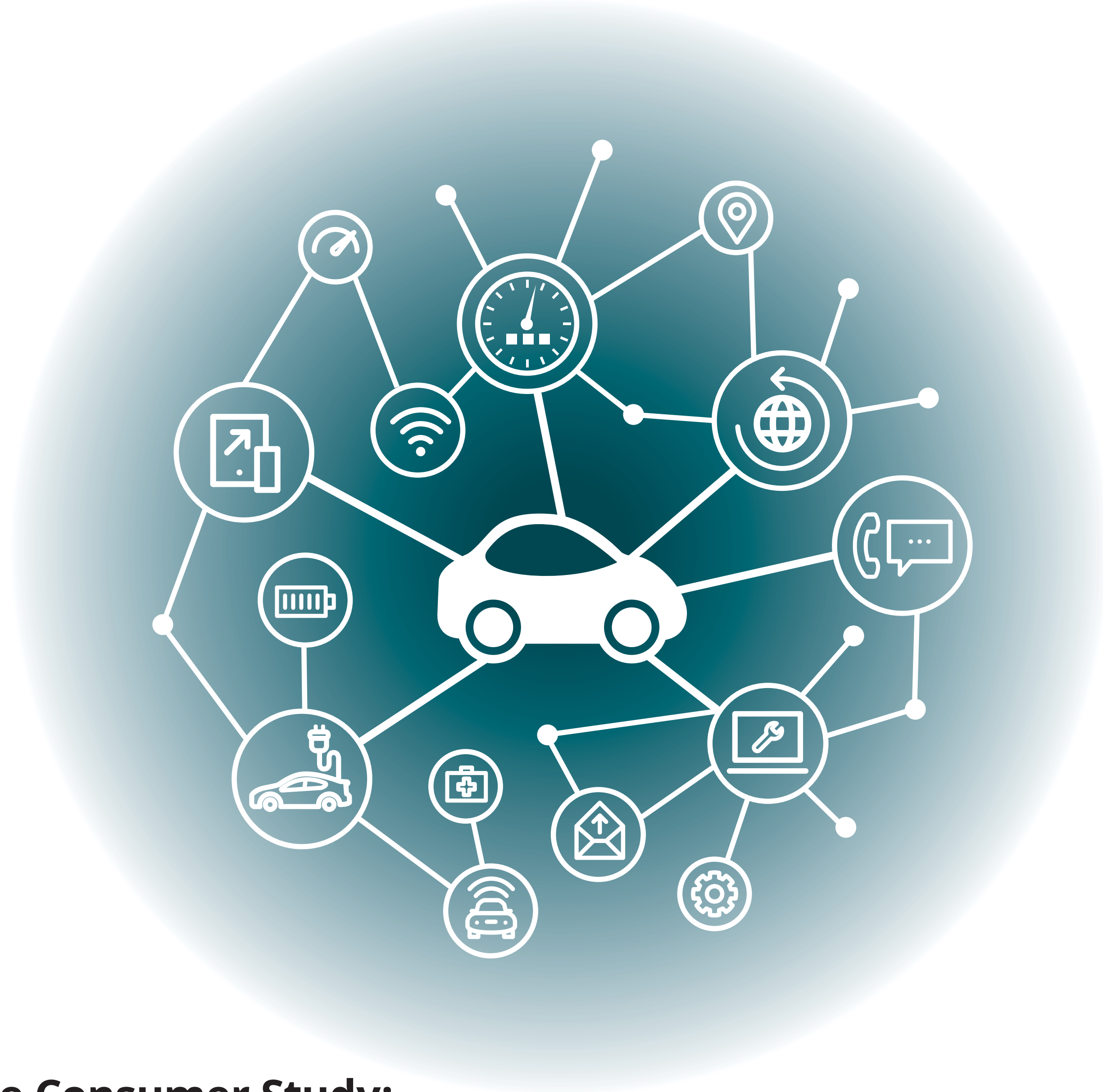
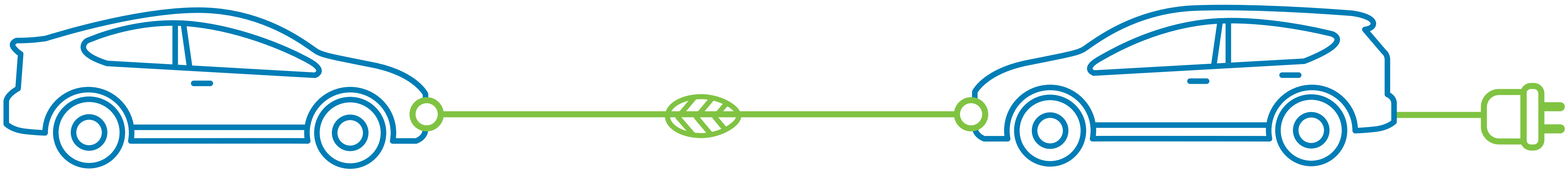


Global Automotive Consumer Study: Future of automotive technologies

Southeast Asia Edition

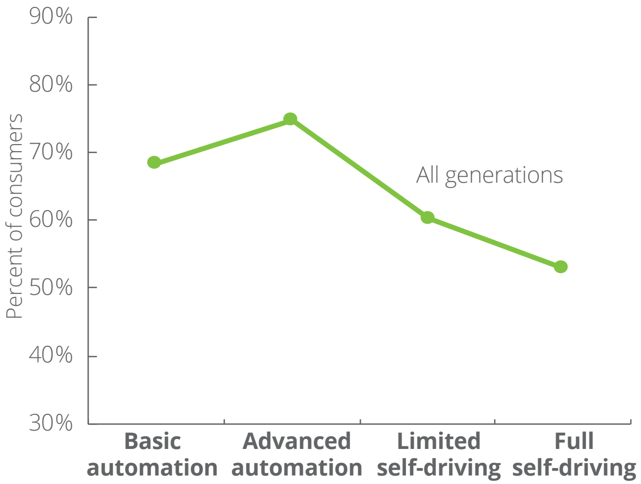
About Deloitte Automotive Consumer Survey

Deloitte's Global Automotive practice has been exploring consumers' evolving automotive and mobility preferences since 2009. The latest Global Automotive Consumer Study "What's ahead for fully autonomous driving: Consumer opinions on advanced vehicle technology," explores perspectives in advanced vehicle technologies, including self-driving technology, advanced safety and powertrain systems, cockpit technologies, and more among consumers in the US, China, India, Germany, Japan, South Korea and Southeast Asia. In the first-ever Southeast Asia edition of the Automotive Consumer Survey conducted in Indonesia, Malaysia and Thailand which surveyed 1,500 consumers, this publication reveals some interesting insights into how consumers in Southeast Asia feel about the rapidly evolving in-vehicle technologies. The areas explored include consumers' interest in full self-driving technologies, willingness to pay for vehicle technologies, advanced technologies consumers find most and least useful, interest in ride-sharing and the impact on consumers' desire to own vehicles in the future.



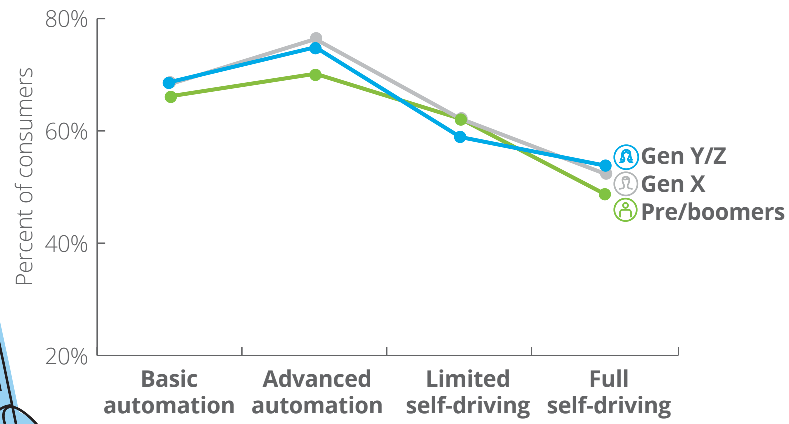
How do SEA consumers feel about in-vehicle technologies?

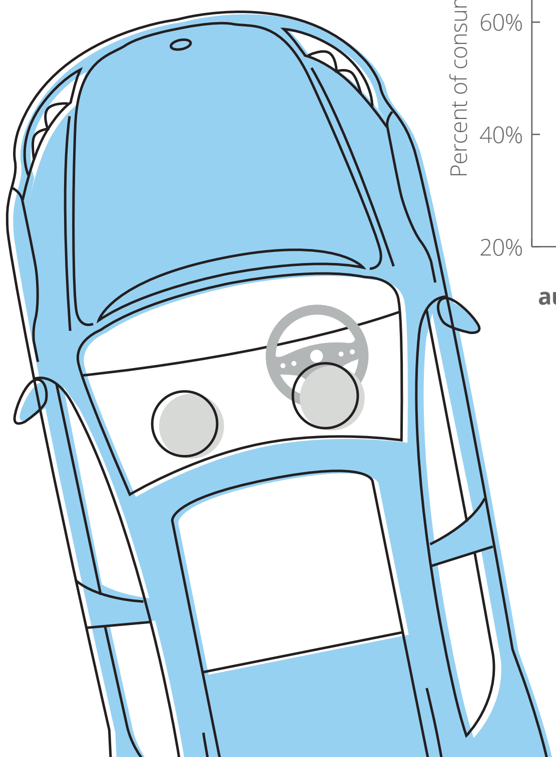
SEA consumers are showing resistance to assisted driving features...



Source: Deloitte Global Automotive Consumer Study 2017

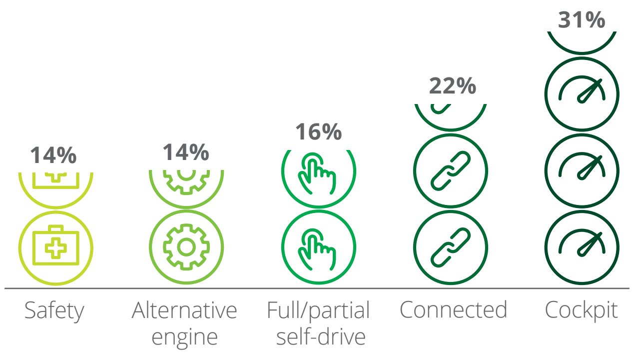
...but, Gen Y/Z consumers are generally more receptive to full self-driving vehicles





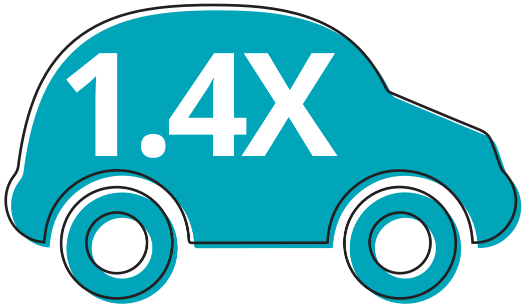
How much are SEA consumers willing to pay for these technologies?

Most SEA consumers are unwilling to pay extra for in-vehicle technologies...



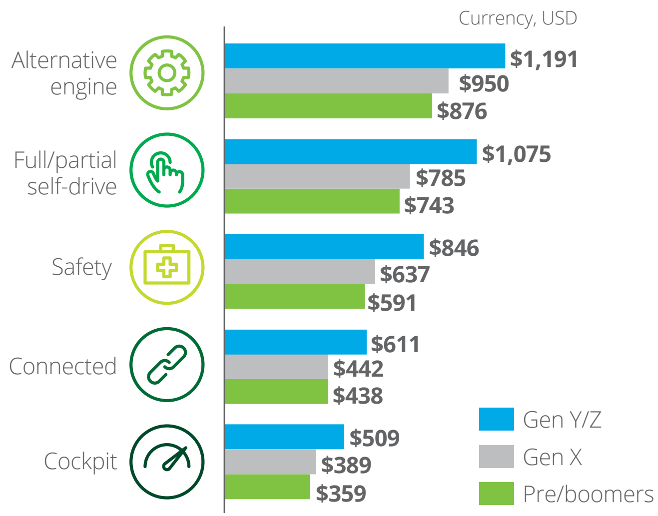
Percentage of SEA consumers who are unwilling to pay more for various technologies

Source: Deloitte Global Automotive Consumer Study 2017



How much more, on average, SEA Gen Y/Z consumers are willing to pay versus Pre/boomers

...but younger generation consumers (Gen Y/Z) are willing to pay more for many of the vehicle technologies compared to other generations



Safety technologies (lane departure warning, blind spot detection, night vision system)

Connected technologies (communication with other vehicles and infrastructure to optimise traffic flow, diagnose problems with the vehicle and schedule service appointments)

Cockpit technologies (entertainment, smartphone mirroring, voice recognition)

Full/partial self-drive technologies (full self-driving cars, traffic jam assist, adaptive cruise control)

Alternative engine technologies (electric, hybrid, fuel cell, and ethanol based engines)

How do SEA consumers feel about safety vs. connectivity?

SAFETY features win...

Top 4 features deemed most useful by SEA consumers

- Blocks driver from dangerous driving situations
- Recognises objects on road and avoids collision
- Informs driver of dangerous driving situations
- Takes steps in medical emergency or accident

Source: Deloitte Global Automotive Consumer Study 2017

...but, TRUST needs to be earned

19%

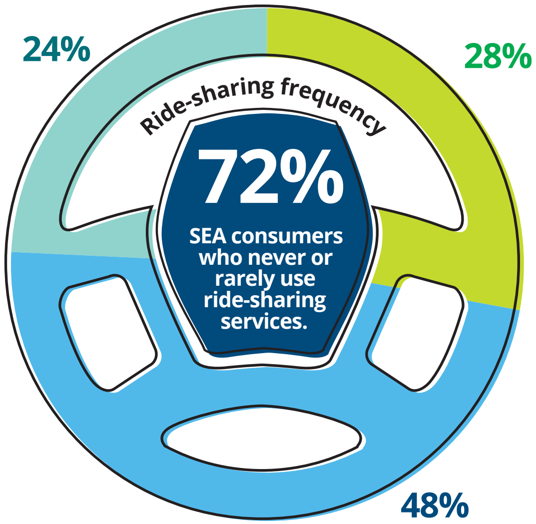
SEA consumers who trust traditional manufacturers to bring self-driving technology to market

81%

SEA consumers who trust non-traditional players to bring self-driving technology to market

Ride-sharing a risk to traditional ownership models

Although most consumers never or rarely use ride-sharing services…

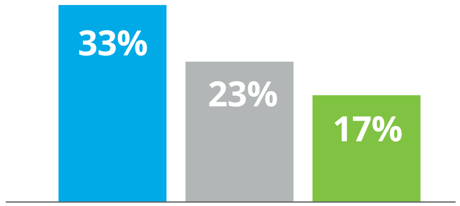


At least once a week | Rarely | Never

* Ride-sharing is defined in this study as car sharing services wherein consumers hire a car/driver via the phone, or an app.

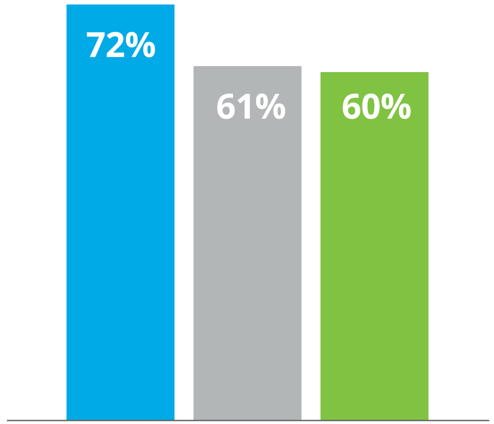
Source: Deloitte Global Automotive Consumer Study 2017

…33% of Gen Y/Z consumers use ride-sharing services, compared to only 17% Pre/Boomers



Uses of ride-sharing services, by generation

72% Gen Y/Z are more likely to question their need to own a vehicle in future



Consumers who questions their future vehicle ownership due to use of ride-sharing services

Gen Y/Z | Gen X | Pre/Boomers

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