ONE IN THREE PEOPLE IN SOUTH EAST ASIA ARE OPEN TO ELECTRIC VEHICLE AS NEXT CAR

37% of respondents are open to purchasing an EV as their next car, with respondents in the Philippines, Thailand, and Indonesia the most eager.

Top 3 barriers to overcome for EV purchase in selected South East Asian countries:

1. Battery safety standards
2. Charging flexibility & convenience
3. Lower operating costs
4. Environmental awareness

RIGHT INCENTIVES WILL SPUR MOBILITY ELECTRIFICATION IN SOUTH EAST ASIA

Tax waiver by the government considered the most important incentive by customers to switch to electric vehicles:

- 75% Tax waiver on cars
- 70% Charging station in apartments
- 56% Priority lanes for EVs
- 53% Free parking
- 53% Toll discounts

STRONG UNDERSTANDING OF ELECTRIC VEHICLES AMONG SOUTH EAST ASIAN CUSTOMERS

Despite low uptake of electric vehicles in the region, customers are highly aware and engaged:

Most South East Asian customers associate EVs with BEVs, signaling growth opportunities in the segment:

- 83% Battery EVs (BEVs)
- 35% Plug-In Hybrid EVs (PHEVs)
- 31% Full Hybrid
- 25% Parallel Hybrid

80% of respondents consider source of electricity as key purchase criterion.

About the studies:

Nissan Motor Asia Pacific has commissioned a study with Frost & Sullivan global growth consulting company."The Future of Electric Vehicles in Southeast Asia." The study was conducted in 6 countries, Singapore, Indonesia, Thailand, Malaysia, Vietnam, and the Philippines. Frost & Sullivan interviewed 1,860 customers online and conducted Focus Group Discussions in select cities to understand potential customers’ awareness, attitudes, behavior and perceptions towards Electric Vehicles. Frost & Sullivan also studied the policies and regulations for electric vehicles as a part of this study.