



## The Future of Mobility: Electrification and Beyond

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



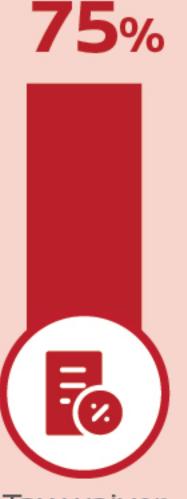
of respondents are open to purchasing an EV as their next car, with respondents in the Philippines, Thailand, and Indonesia the most eager

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





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



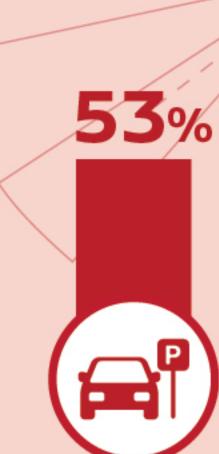
Tax waiver on cars



Charging station in apartments



Priority lanes for EVs



Free parking



## STRONG UNDERSTANDING OF ELECTRIC VEHICLES AMONG SOUTH EAST ASIAN CUSTOMERS

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

7

80%

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



Battery EVs (BEVs)

35%

Plug-in Hybrid EVs (PHEVs)

31%

Full Hybrid

25%

of respondents consider

source of electricity a

key purchase criterion

Parallel Hybrid



## About the studies

Nissan Motor Asia Pacific has commissioned a study with Frost & Sullivan, global growth consulting company, titled "The Future of Electric Vehicles in South East Asia". The study was conducted in six countries, Singapore, Indonesia, Thailand, Malaysia, Vietnam and the Philippines. Frost & Sullivan interviewed 1,800 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.

