

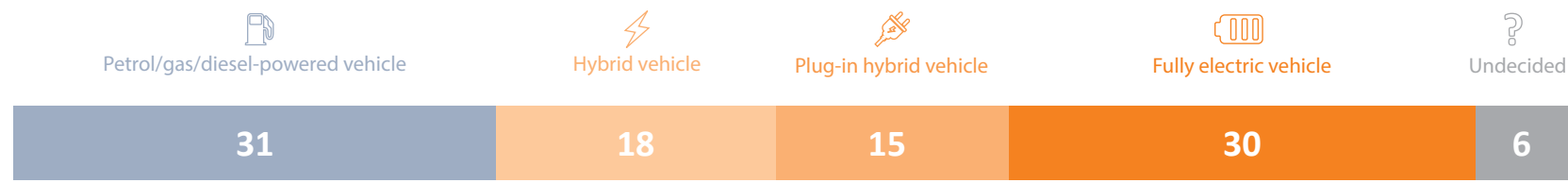
A city skyline at night, likely New York City, with a prominent skyscraper. In the foreground, a road curves through a dark area, with bright, glowing light trails from cars, suggesting motion and technology. The overall color palette is dominated by warm oranges and yellows from the light trails and the city lights, contrasting with the dark silhouettes of the buildings and trees.

Evolving Mobility: Electric Vehicles and Autonomous Driving

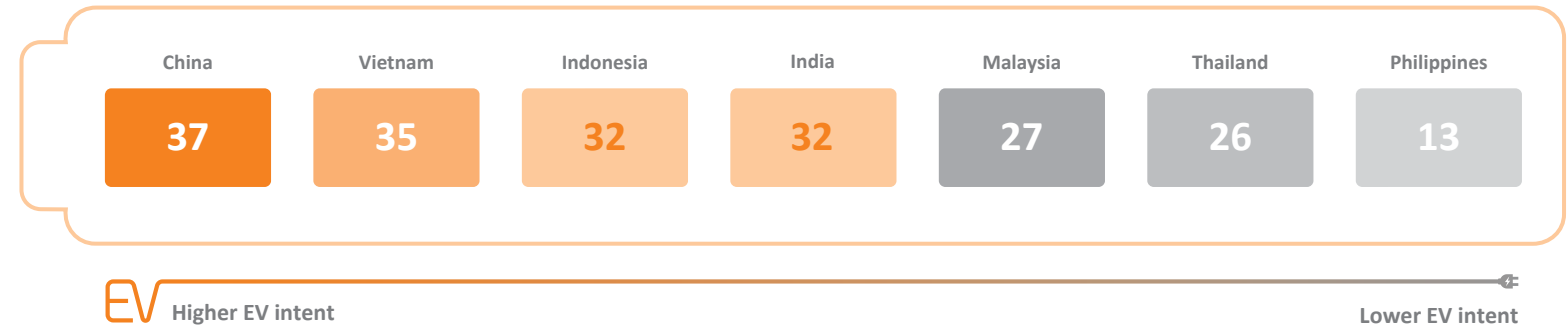
Consumer mobility shows rising acceptance of EVs in Emerging Asia

Purchase intent is comparable between electric vehicles (EVs) and petrol vehicles (30% vs. 31%), with stronger EV preference seen in China, Vietnam, Indonesia and India.

Future car type preference (%)



Fully electric vehicle purchase intent by market (%)

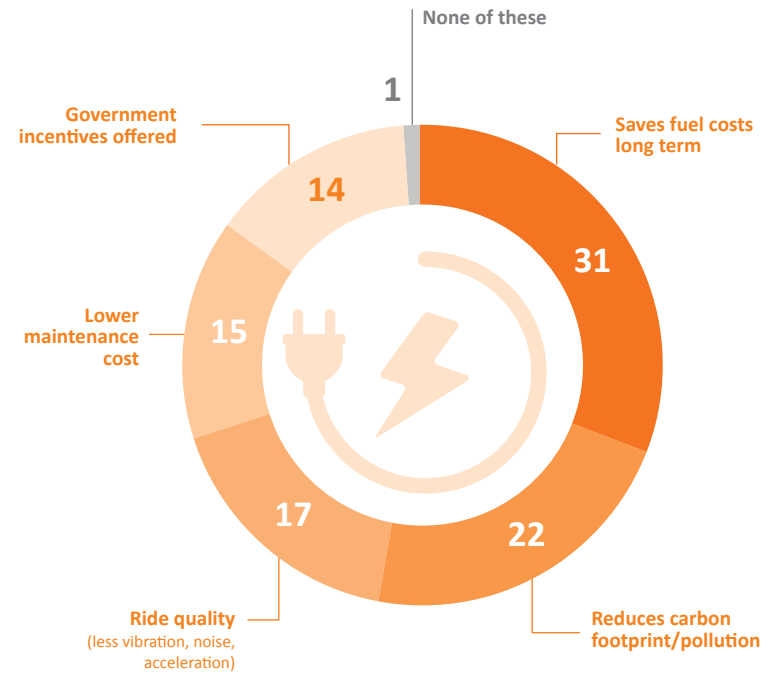


G4. Assuming you'd buy a new car in the next 12 months, please indicate what type of car you would most likely buy? (Base: Those coded 2/3/4/5/6 in G1)

EV adoption is motivated by cost savings and sustainability, but constrained by practical concerns on charging infrastructure and range

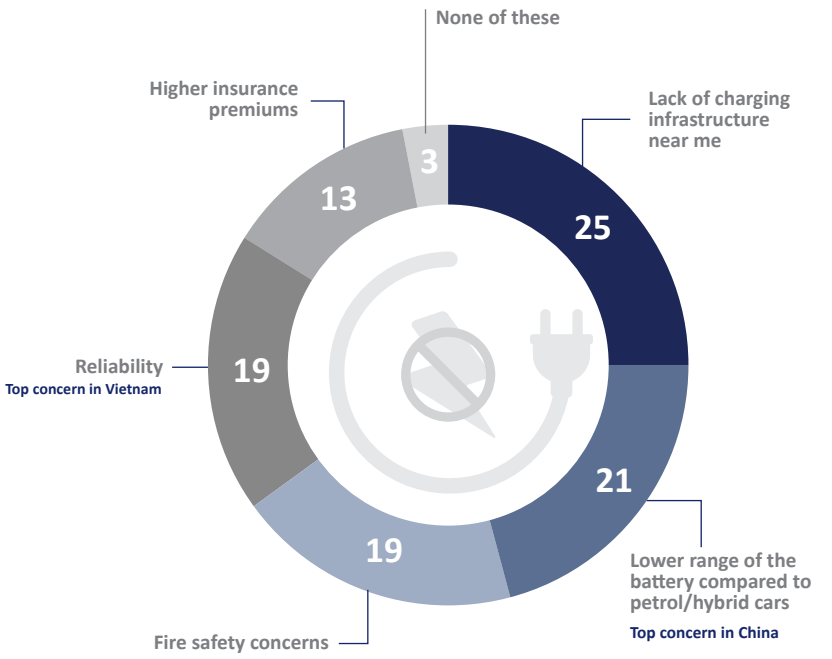
The top reasons for selecting an EV or plug-in hybrid are long-term fuel cost savings and reducing carbon footprint. Key barriers to adopting fully electric vehicles include limited charging infrastructure near the user and lower driving range compared to petrol or hybrid vehicles.

Reasons for selecting EV or PHEV (%)



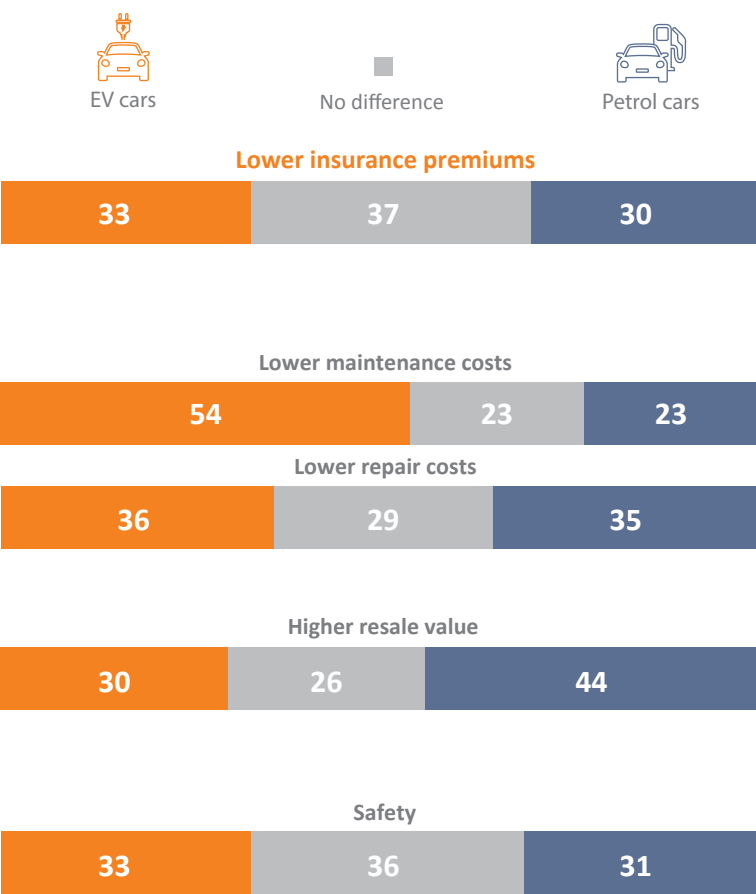
G7. Which of the following are the most important reasons for you to select an EV or plug-in hybrid car? (Base: Those coded G1 = 5/6 or G4 =3/4)
G8. What discourages you from buying a fully electric vehicle? (Base: Those coded G1=3, 4, 5 and G4=1, 2, 3 and 97)

Reasons for not selecting EV (%)



Consumers are unclear on insurance costs for EV versus petrol cars

Whether EV or petrol cars win across key performance aspects (%)



Overall, **consumers don't have a clear view on insurance premiums for EVs**. Consumers in Indonesia and India expect EVs to have lower insurance premiums, while in China and Thailand, the perception is that EV insurance premiums are higher compared to petrol cars.

Consumers believe EVs have lower maintenance costs compared to petrol cars, but opinions are mixed when it comes to post-damage repair costs.

Petrol cars are seen to have an upper hand when it comes to resale value.

Consumers view EV safety to be at par with traditional combustion engine cars. In Indonesia and Vietnam, more consumers perceive EVs to be safer than petrol cars, while in China, the Philippines, and Thailand, most perceive no difference between the two in terms of safety.

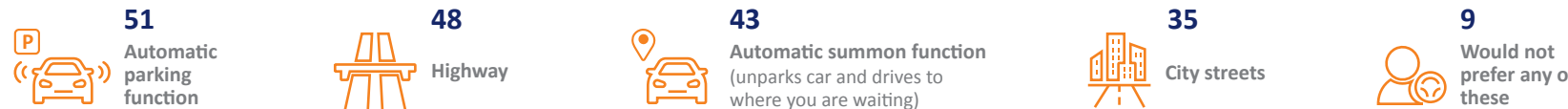
G6. Select whether you think EV or petrol cars win on each of these factors. (Base: All respondents)

Automation is welcome up to a point. Consumers show preference for assisted driving features over full self-driving capabilities

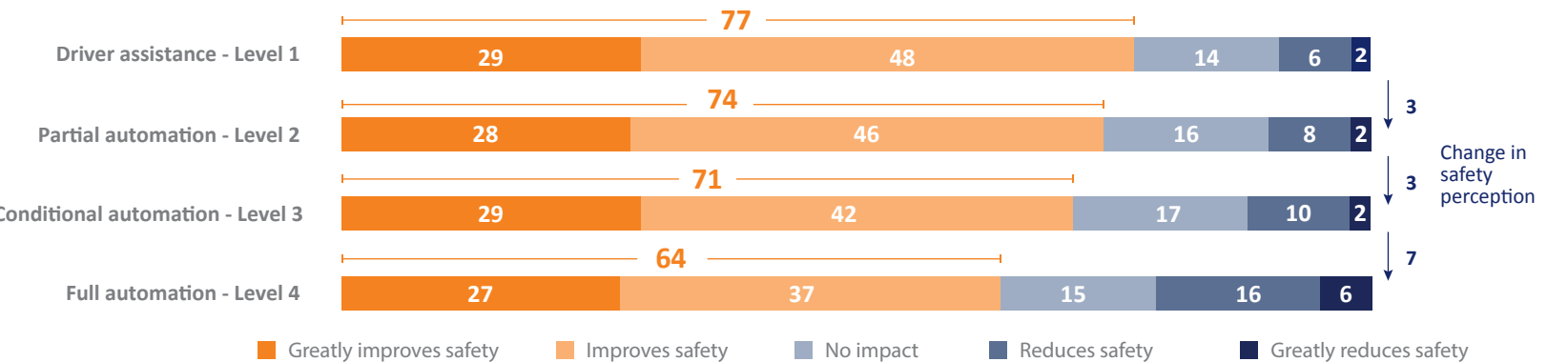
Consumers show strongest **preference for self-driving technology in low-risk, high-convenience scenarios**, such as automated parking (51%) and highway driving assistance (48%).

Consumers broadly believe automation improves driving safety, though **confidence declines with increasing autonomy**—from 77% for basic driver assistance features to 64% for full self-driving capabilities.

Preferred scenarios for self-driving features (%)



Views on automation's impact on road safety, by different levels (%)



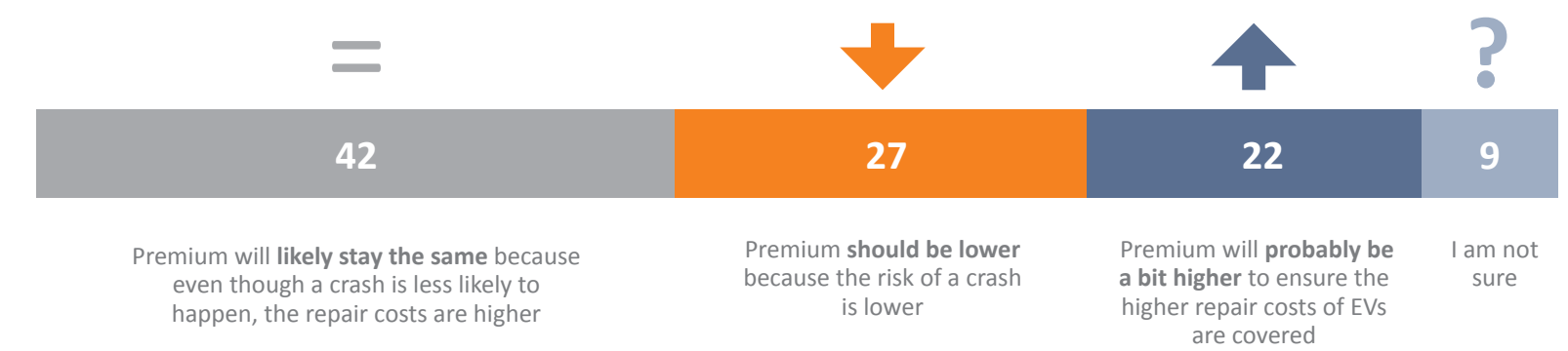
G11. Under what circumstances would you prefer to use self-driving tech? (Base: All respondents)

G9. There are different levels of self-driving technology emerging for cars. What do you feel is the impact of each of the below levels on your overall safety on the road? (Base: All respondents)

Self-driving features not seen to translate to lower insurance costs

If an EV with advanced self-driving technology reduces accident likelihood by 50%, the largest share of consumers (42%) believe insurance premiums would likely remain unchanged, as lower crash frequency is offset by higher potential repair costs.

Expected insurance premium discount for self-driving cars (%)



G10. If an EV equipped with advanced self-driving technology makes it 50% less likely to have an accident, how would this impact the insurance premium? (Base: All respondents)

