

INTAGE India Report

Market perception of electric vehicles in India with desirable features for future purchase (4-Wheeler segment)

August 2021



INTAGE INDIA Pvt. Ltd.

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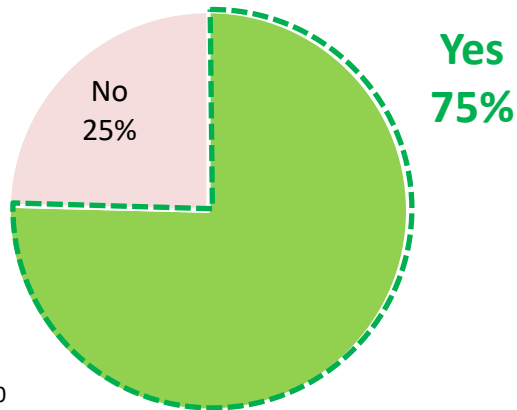


Summary of the Survey

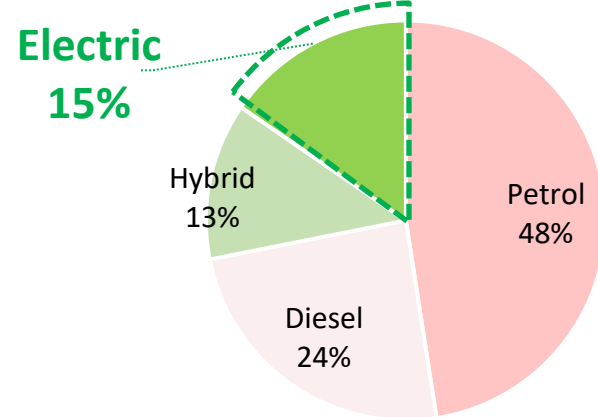
Electric vehicles in India: Market perception

- While many of car owners perceive that India is ready to adopt the electric vehicles (EVs), pure electric is still not realistic choice for the future purchase because of lacking infrastructure and concern of battery life and driving range .

Is India ready to adopt to Electric vehicles?



Preferred fuel type for future car purchase



Electric Vehicles in Indian market- Key drivers & barrier for adoption

Drivers

- Increased awareness among people.
- Various EV model launches from OEM brands.
- Increased on-road visibility for EVs.

Barriers

- Insufficient infrastructure for **EVs-Specially the charging stations**.
- Limited/No **knowledge about the battery life** and its quality. Not enough models or options to benchmark the performance of the batteries.
- **Low range or the travel distance** on full charge among the available models and this possibly leads to range anxiety among the existing owners of EVs and the same is considered as one of the drawbacks of using an EV in the current scenario.

Future car purchase: Most desirable features

Most desirable features (Top 3)-Overall & By Gender



1st : 39%

Remote Vehicle Operations



2nd : 33%

Tire Pressure Monitoring System

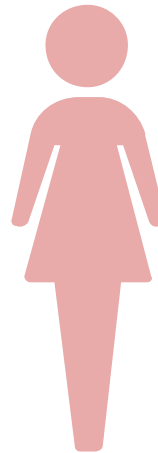


3rd : 32%

EPB with Brake Hold



Male
(n=297)



Female
(n=73)



1st : 36%

Premium sound system/
Dual AC zone



2nd : 34%

360-degree camera



3rd : 33%

EPB with Brake Hold

- Male owners prefer cutting edge features and improving safety.

- Female owners prefer the features to improve the experience in the cabin.
- In addition, driving assistance features are preferable by female.



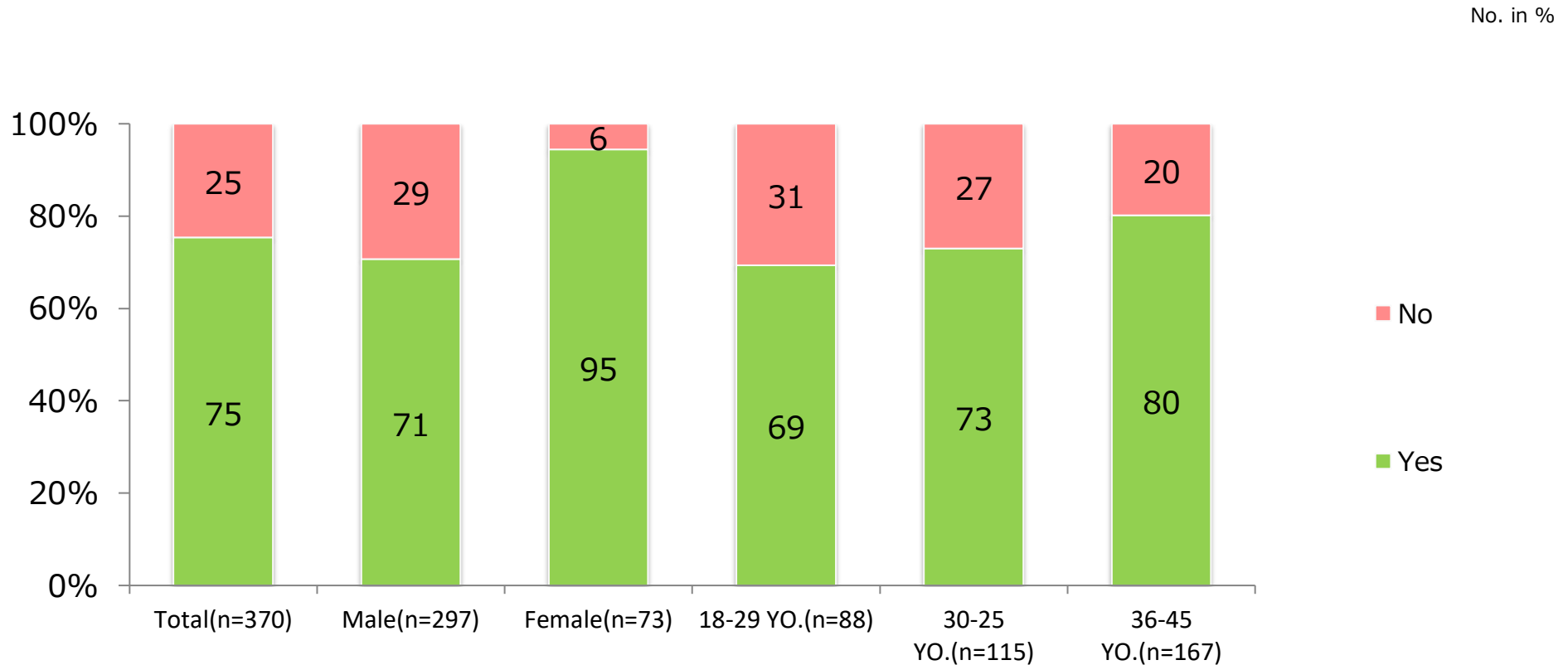
Details of findings



Market perception about Electric vehicles in India

How prepared is India to adopt Electric vehicles (EVs)?

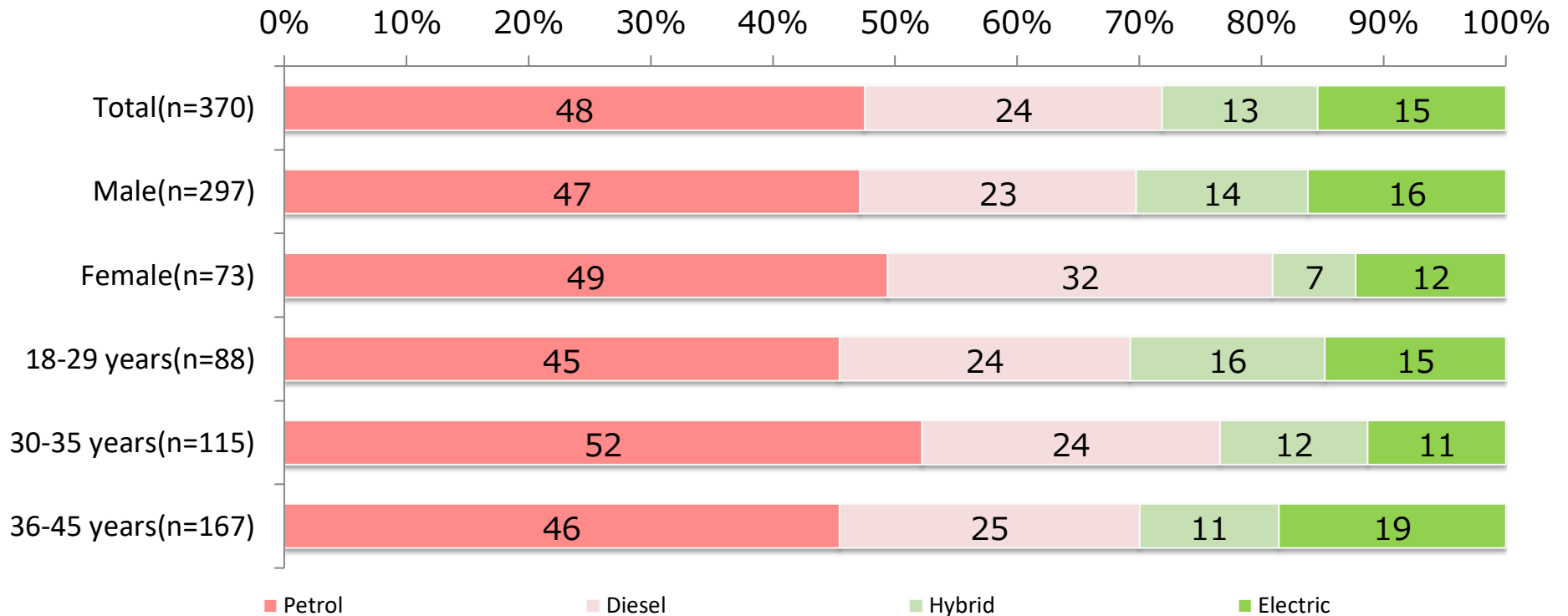
- 3/4th of them feel that India is prepared and ready enough to adopt to electric vehicles.
- This perception is on the higher side among the females and the ones form the older age group (36-45 YO.)



Most preferred fuel type for future purchase

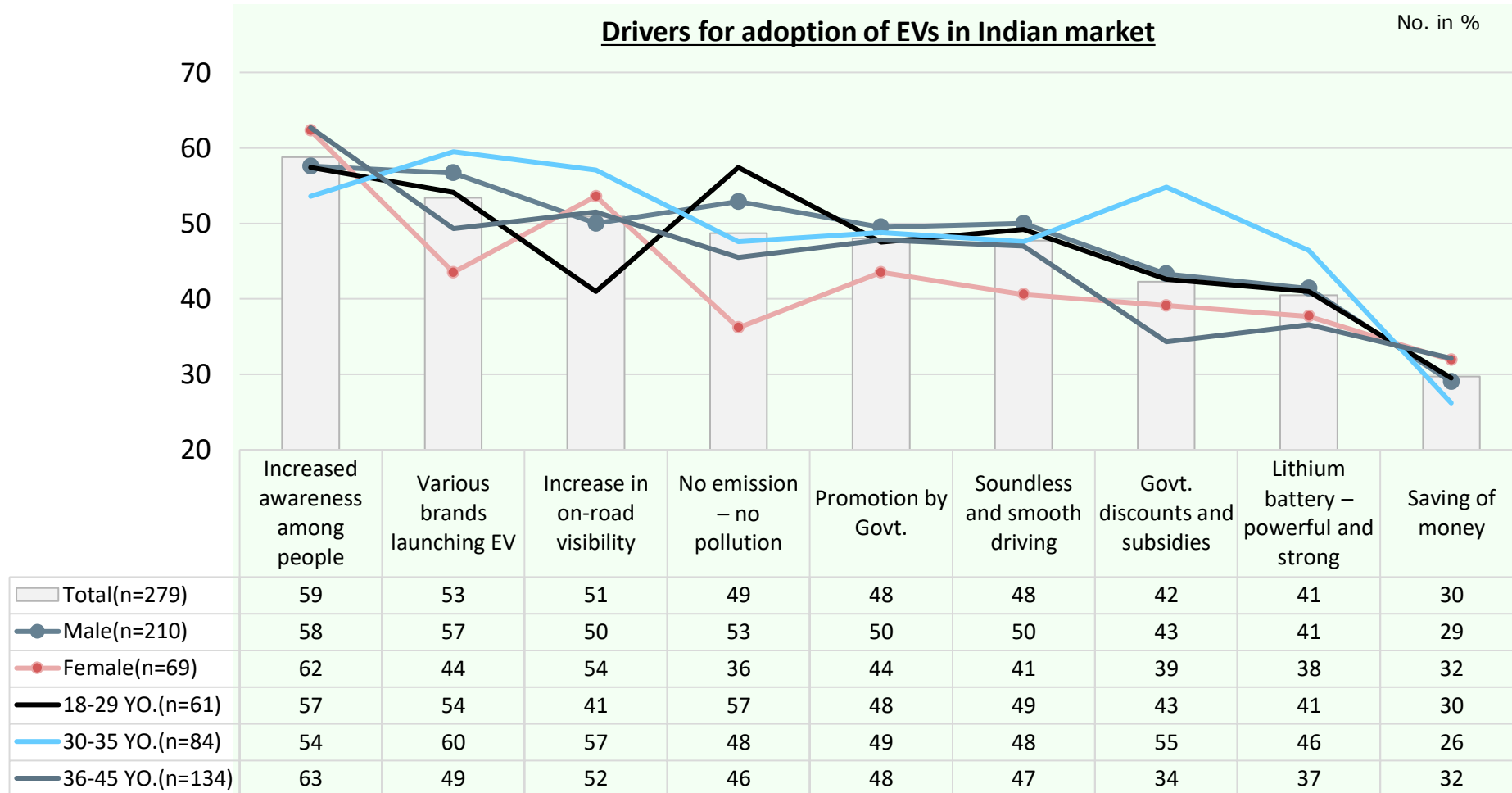
- Petrol cars are still the most desirable across all segments.
- Preference for EVs looks decent specially among the older age group (36-45 yrs.) followed by males.

No. in %



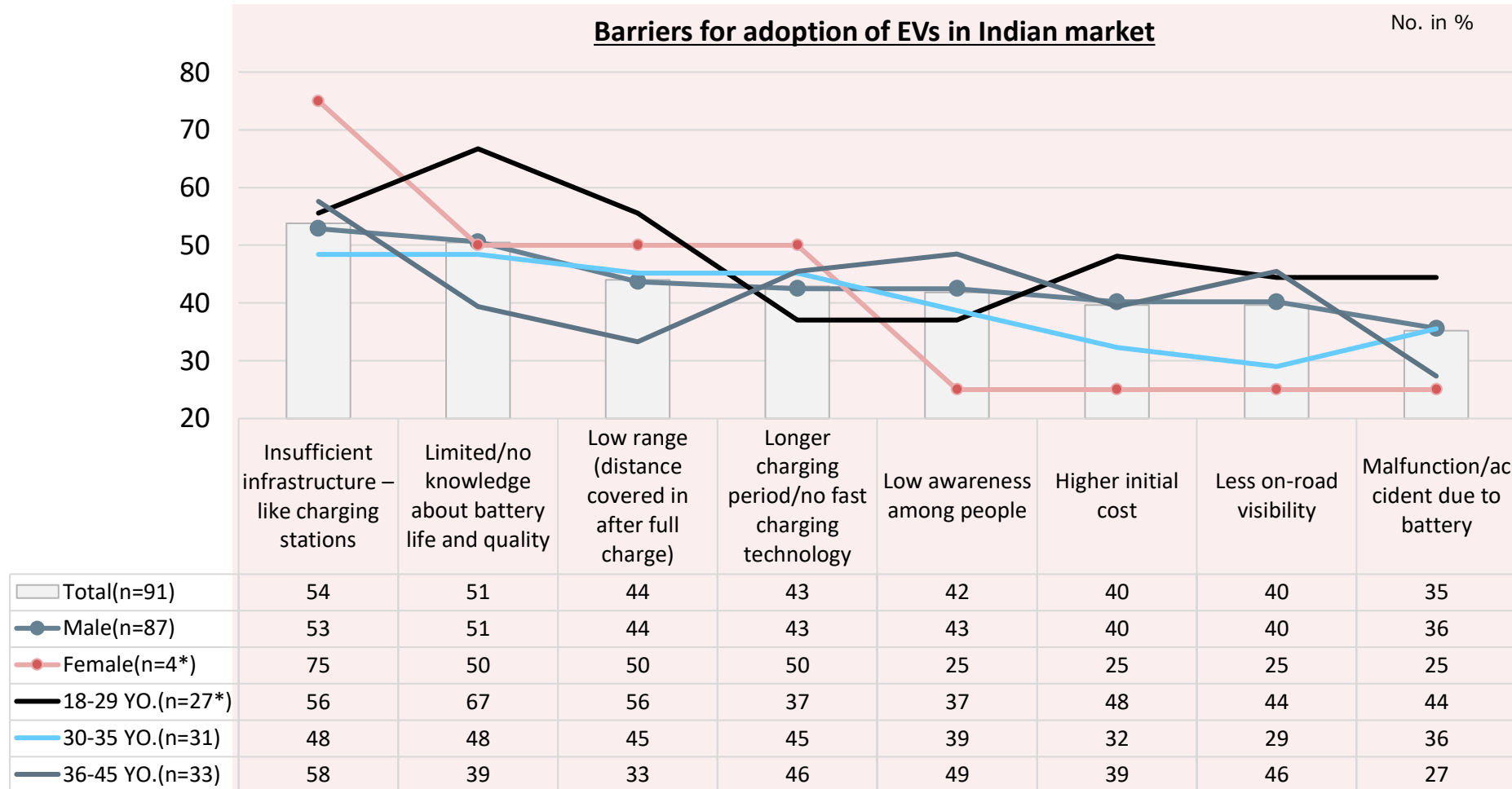
Electric vehicles (EVs): Key drivers for adoption in India

- Increased awareness among people comes across as a key driving factor followed by EV launches from the OEMs.
- This trend remains the same across all the segments except the younger age group (18-29 YO.) where the key driving factor for adoption of EVs is no emission/no pollutions.



Electric vehicles (EVs): Barrier for adoption in India

- Insufficient infrastructure followed by limited or less knowledge about the battery life and its quality without any benchmarks to compare are seen as key barriers for adoption of EVs in India.


















Desirable features for future purchase

Top 5- Most desirable features in a car for future purchase

- Remote vehicle operations such as engine start, lock/unlock, AC switch on/off are the most desired features for the intending purchasers, specially among males and the older age group (30-45 yrs.)
- However, Females and the younger age group (18-29 yrs.) desire to have a premium sound system with Bose/Infinity speakers for entertainment.


No. in % Top 1 Top 2 Top 3

	Total	Male	Female	18-29 YO.	30-35 YO.	36-45 YO.
	<i>Base: 370</i>	297	73	88	115	167
Convenience	Remote Vehicle Operations  37	39	29	39	41	34
Safety	Electronic Parking Brake with Brake Hold  32	32	33	34	37	28
Safety	Tire Pressure Monitoring System  32	33	27	31	31	33
Safety	Night Vision Glass  30	29	32	25	32	30
Fun	Premium Sound System / Branded Audio  29	28	36	41	28	24
Comfortable	Dual Zone AC  29	27	36	27	29	29
Convenience	360 degree camera  28	26	34	35	24	26
Comfortable	Pollution Remittance Measures  27	27	27	26	32	24
Comfortable	Air Purifier with Display  27	25	32	24	30	26
Safety	Pothole/Speed breaker Detector  26	26	27	21	28	28
Comfortable	Electric Power Seats  24	24	25	24	25	23
Comfortable	Heat resistant coating  24	25	22	23	28	22
Fun	Sunroof  22	22	21	22	17	25
Safety	Side and Curtain Airbags  22	23	16	27	12	25
Convenience	Cruise Control  21	21	25	23	18	23



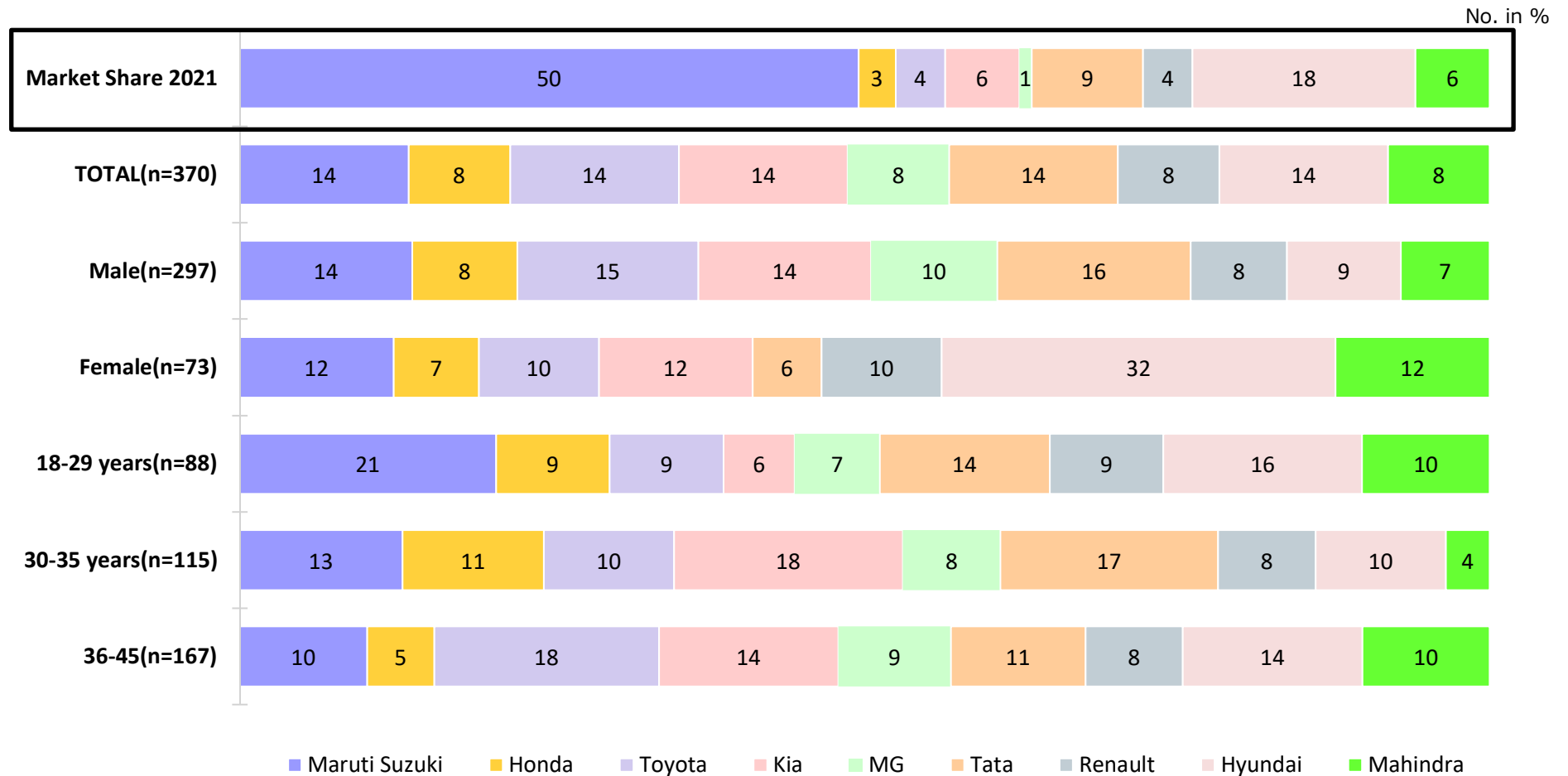
Research Design

Survey outline

Methodology	<ul style="list-style-type: none">• Online survey through a structured questionnaire with Asian Panel (Intage's online research panel)															
Target	<ul style="list-style-type: none">• Male & Female• Age 18-45 years old• SEC A• 4-wheeler owners															
Area	<ul style="list-style-type: none">• India (Nationwide)															
Interview Length	<ul style="list-style-type: none">• Approx. 20 minutes															
Timing	<ul style="list-style-type: none">• July, 2021															
Sample distribution	 <p>The sample distribution is visualized through two donut charts. The first chart, labeled 'Gender', shows that 80% of the sample is Male (represented by a blue segment) and 20% is Female (represented by a red segment). The second chart, labeled 'Age', shows the distribution across three age groups: 18-29 years (24%, blue segment), 30-35 years (31%, orange segment), and 36-45 years (45%, grey segment).</p> <table border="1"><thead><tr><th>Category</th><th>Sub-category</th><th>Percentage</th></tr></thead><tbody><tr><td rowspan="2">Gender</td><td>Male</td><td>80%</td></tr><tr><td>Female</td><td>20%</td></tr><tr><td rowspan="3">Age</td><td>18-29 years</td><td>24%</td></tr><tr><td>30-35 years</td><td>31%</td></tr><tr><td>36-45 years</td><td>45%</td></tr></tbody></table>	Category	Sub-category	Percentage	Gender	Male	80%	Female	20%	Age	18-29 years	24%	30-35 years	31%	36-45 years	45%
Category	Sub-category	Percentage														
Gender	Male	80%														
	Female	20%														
Age	18-29 years	24%														
	30-35 years	31%														
	36-45 years	45%														

Sample composition

- Sample split by brand of car owned.



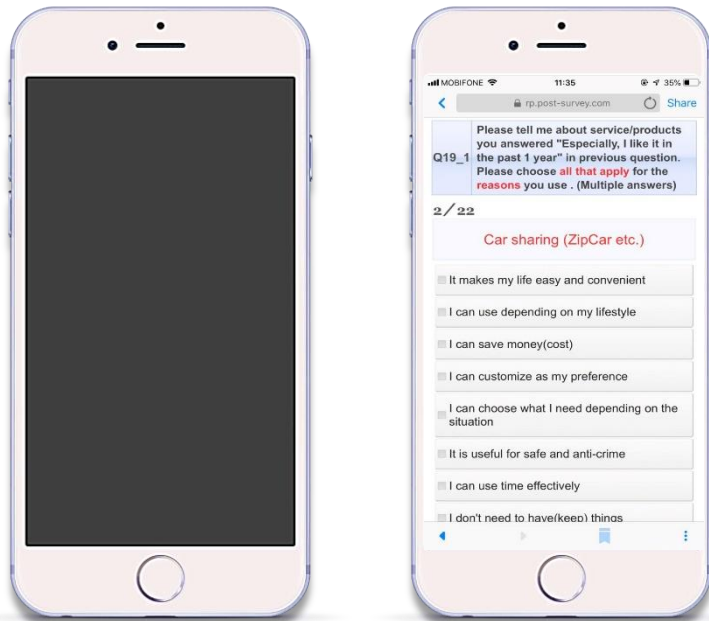


Appendix

Asian Panel (AP) : INTAGE's Online Research Panel (Online Survey)

Asian Panel

Quick and Decisive Insights



Strong community with more than 9 millions users+ in Asia.



User-friendly interface.
Quick access to the survey anywhere at anytime.



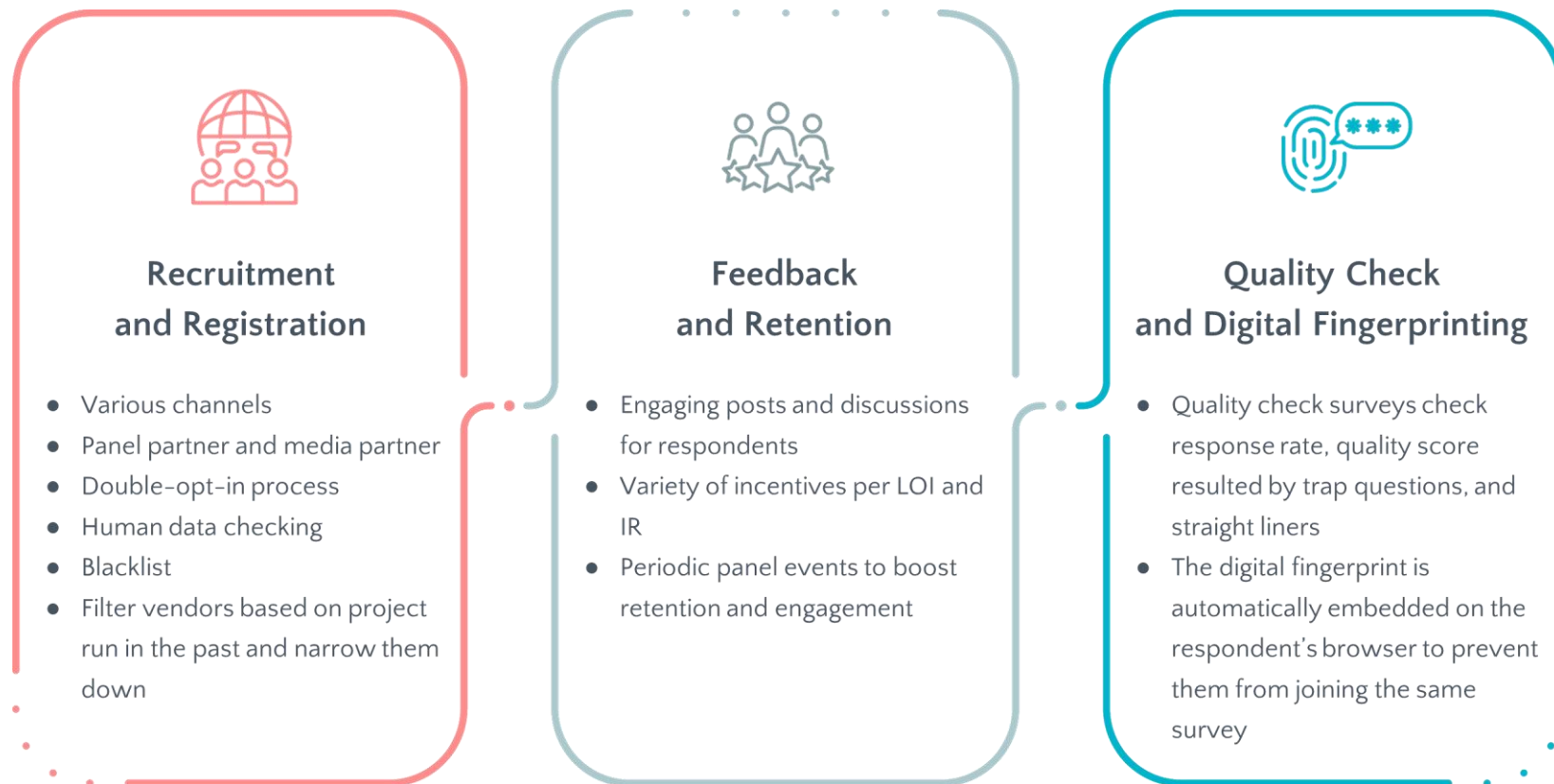
Fast & reasonable price for all processes



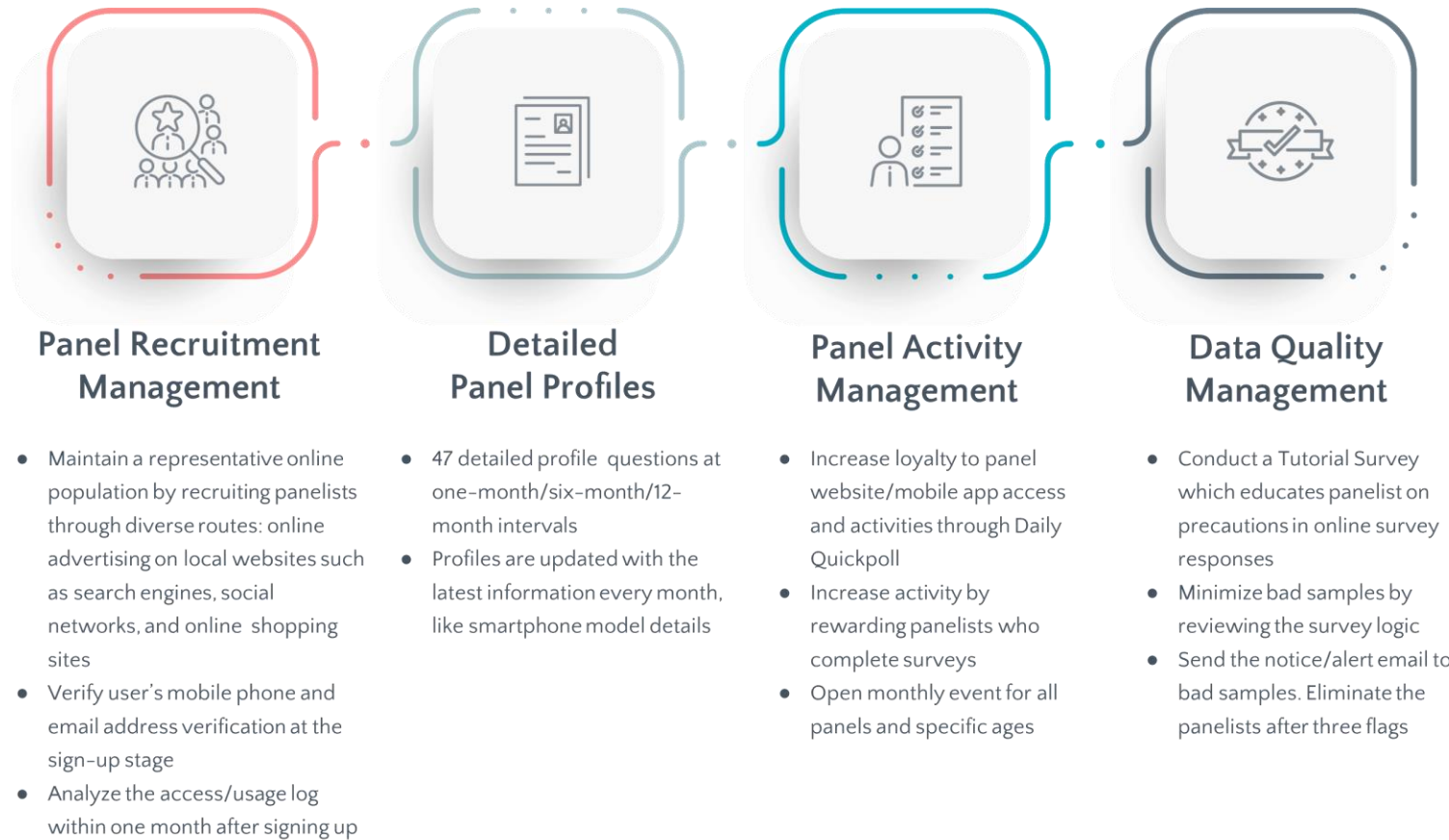
Various types of information can be collected (photo, video, etc.)

QUALITY CONTROL (1/2)

INTAGE applies the following standards to ensure quality data:



QUALITY CONTROL (2/2)





COVERAGE

Extensive coverage and detailed profiling for your Asian research needs.
Our panels are always growing!

MARKET	PANEL SIZE	MARKET	PANEL SIZE
JAPAN	2,064,371	VIETNAM	754,195
CHINA	3,422,009	TAIWAN	295,194
KOREA	416,961	HONG KONG	19,110
SINGAPORE	105,861	MALAYSIA	353,556
INDONESIA	1,455,062	PHILIPPINES	427,149
THAILAND	1,434,046	INDIA	77,917



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