



中国新能源汽车 消费者洞察

Consumer Insights on New
Energy Vehicles in China

预致汽车咨询有限公司和
毕马威中国联合出品
In association with AutoForesight

中国的潜在买车人士是既受政策、经济诱因驱动，又有环保意识的消费者。

Potential Chinese customers are policy- and economically driven, environmentally conscious consumers

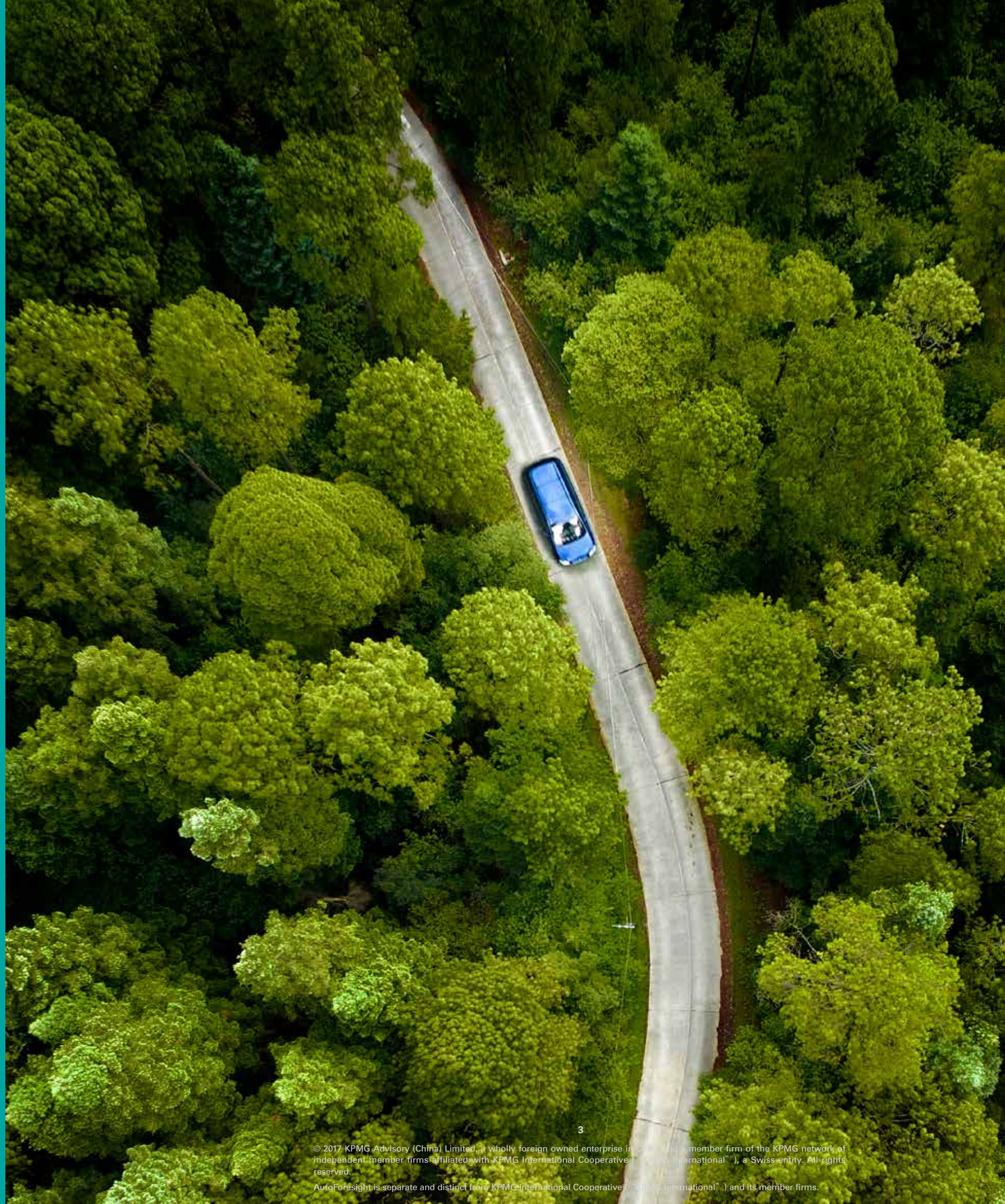
回顾 2016 年，中国的新能源汽车市场长足发展，新能源汽车销量超过 50 万辆的佳绩。中国的消费者为什么选购新能源汽车或电动汽车呢？更重要的是，购买新能源汽车的消费者对新能源汽车有何看法？

毕马威中国与汽车业市场调研机构 AutoForesight 联手对 220 位新能源汽车车主和潜在买车人士开展了一项调研，以了解中国的汽车消费者目前和未来的需要和诉求，调研结果颇出乎意料。

In 2016, we saw an impressive increase in the new energy vehicle (NEV) market in China, with over half a million new NEV car sales. Why would Chinese customers choose to buy an NEV or electric vehicle (EV)? Most importantly, what do potential NEV buyers think about the topic of NEVs?

KPMG China and market & industry research firm AutoForesight have conducted a survey of 220 NEV owners and potential NEV buyers to understand the needs and wants of current and future Chinese automobile consumers – and the results are surprising.

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动机和理由

在中国的新能源汽车车主和潜在买车人士之中，70% 的受访者在工作日平均驾驶里数达 40 公里，周末驾驶里数达 40 公里的百分比下跌至 65%。电动汽车的主要用途是上班出行。调查发现，两类受访者都认为与内燃机汽车（传统燃油汽车）相比，电动汽车在经济上更划算，而且更环保，国家补贴也是促使消费者买车 / 拥有汽车的重要因素，特别是在一些需要限量拍卖私车牌照，交通比较拥堵的大城市。

购买电动汽车的原因是多方面的。虽然车主表示主要原因是免费私车牌照和国家补贴，潜在买车人士认为购买电动汽车的主要原因是维保费用较低，而且有利于保护环境，其次是免费私车牌照。

但是，消费者过去对新能源汽车的疑虑仍然存在。首次购买新能源汽车的车主和潜在买车人士认为电动汽车的缺点是电池续航力不足（及电池技术）、充电速度缓慢，以及充电设施短缺等。大多数新能源汽车车主会在家中或工作地点（如有充电设施）为汽车充电。然而虽有疑虑，仍有 45% 的现有新能源汽车车主表示将来会再购一辆新能源汽车，反映消费者对新能源汽车的未来仍有信心。

中国的新能源汽车车主和潜在车主对电池的续航力也有类似的期望。超过 70% 的受访者期望电动汽车续航力为 350 公里，他们认为这个距离应可足够满足其驾驶需要。在可接受的最长充电时间方面，超过 53% 的新能源汽车车主目前接受 4 小时的充电时间（潜在车主 - 73%），而大多数新能源汽车车主（84%）期望最快充电时间在 1 小时以内（潜在车主 - 61%）。

Motivation and rationale

Of the Chinese NEV owners and potential buyers, 70 percent need to travel an average of up to 40km on weekdays. This drops to 65 percent on weekends. The primary use of EVs is commuting to work. The research found that both groups believe that compared to internal combustion engine (ICE) cars (conventional vehicles), electric vehicles are more economical and environmentally friendly, and that state subsidies are important factors in buying/owning a car, especially in dense cities with car licence plate quotas.

The reasons for purchasing an EV are manifold. While owners say the key reasons are free car licence plates and state subsidies, potential buyers believe that the main reasons for purchasing EVs is the lower maintenance costs and environmental protection benefits, followed by the free licence plates.

However, previous concerns about NEVs remain. First-time NEV owners and potential buyers see the drawbacks of EVs as the battery range (and the battery technology), the slow battery charging speed, as well as the availability of charging pole infrastructure. The majority of NEV owners primarily charge their cars at home or at their workplace (if charging infrastructure is provided). However, 45 percent current NEV owners would purchase another NEV, demonstrating customers' belief in the future of NEVs.

Chinese NEV owners and potential owners have quite similar expectations with regard to range. Over 70 percent expect the range of EVs to be 350km, which they believe would sufficiently cover their mobility needs. In terms of the longest acceptable battery charging time, more than 53 percent of NEV owners would currently accept a charging time of up to four hours (potential owners - 73 percent), while the majority of NEV owners (84 percent) expect a maximum fast charging time of within one hour (potential owners - 61 percent).



品牌认知和 偏好

由于中国政府会运用税务激励、补贴和免费私车牌照等措施鼓励消费者购买本地制造品牌的新能源汽车，所以本地制造的新能源汽车销量占据最大份额并不足为奇。调查发现，受访者对比亚迪汽车、荣威和北汽等中国品牌的偏好和认识特别明显。值得注意的是，受访者主要认识的外国品牌（但只限于潜在消费者）是特斯拉，而且排名在比亚迪和荣威之后。

除了品牌认识外，产品质量和专业服务也是车主购买汽车的两大原因。对于潜在消费者来说，品牌认知是关键，其次是新能源汽车领域的行业领导地位和科技的成熟度。

Brand awareness and preference

As the Chinese Government is using tax incentives, subsidies and free licence plates to encourage customers to buy locally produced NEV brands, it is not surprising that most sales come from domestically produced NEVs. The survey found that Chinese brand preference and awareness is especially strong for BYD Auto, Roewe and BAIC. Interestingly, the major foreign brand that has brand recognition (but only for potential customers) is Tesla, which is ranked behind BYD and Roewe.

After brand awareness, product quality and professional service are the other two reasons that owners purchase their vehicles. For potential customers, brand awareness is key, followed by industry leadership in the NEV space and the maturity of the technology.



电动汽车的 未来

中国社会，特别是较年轻的消费者较容易接受新科技，尤其是为日常生活带来便利的高科技产物，例如手机银行、社交媒体、网购等。对消费者来说便利才是关键。因此，我们发现新能源汽车车主，尤其是潜在车主对未来的新能源汽车功能有新的期望，虽然不是硬性要求。

他们的最大期望是新能源汽车能够把半自动及 / 或全自动驾驶功能作为标配。自动驾驶、停车辅助和其他高级驾驶辅助系统 (ADAS) 功能在两大消费者类别中的排名均位于前列。在新能源汽车车主中，49% 的受访者期望新能源汽车能够具备 3 级自动驾驶功能 (解放双眼)，32% 期望具备 2 级自动驾驶功能 (解放双手)，而高达 68% 的潜在消费者期望未来的新能源汽车可同时具备 2 级和 3 级自动驾驶功能。两大消费类别的受访者均同意 3 级自动驾驶功能将大幅改善驾驶质量，因此可提升生活水平。

现有的新能源汽车车主和潜在消费者对电动汽车共享经济态度正面。当问到选择自行驾驶的电动汽车，还是共享汽车服务时，65% 的受访者表示虽然他们仍希望拥有自己的汽车，但他们会使用共享汽车服务。

Beyond EVs

Chinese society – especially younger consumers – embrace new technologies, especially high-tech features that help them in their everyday life, such as mobile banking, social media and mobile commerce. Convenience is key. As such, we observed that NEV owners and especially potential owners have new expectations – if not demands – about future NEV features.

Foremost, they expect standard NEV features to include semi- and/or fully autonomous features. Ranked high amongst both customer groups are autopilot, parking assistance and other advanced driver assistance system (ADAS) features. Of NEV owners, 49 percent would expect NEVs to have autonomous driving Level 3 (eyes off), and 32 percent expect Level 2 (hands off), while a robust 68 percent of potential customers would like see both Level 2 and 3 of autonomous driving in their future NEV. Both groups agree that Level 3 would greatly improve their quality of mobility and therefore be a quality of life improvement.

Current NEV owners and potential buyers have quite a positive attitude towards the sharing economy regarding electric vehicles. When it comes to choosing self-driving EVs from car-sharing services, 65 percent of all respondents agree they would use this service, while acknowledging that they would still want to own their car.



中国视角

随着电动汽车在中国市场渐受欢迎，而且社会越来越接受以电动汽车取代传统的内燃机汽车。中国的消费者对电动汽车的期望值也在不断上调，以满足他们不断上升的驾驶需要。中国的消费者当然明白科技进步才能确保安全，但他们对电动汽车对消费者，以至整个社会所扮演的角色有着清晰的期望。简而言之，电动汽车既要满足他们的驾驶需要（出行及合理的充电速度），而且还有利于保护环境。电动汽车应具备先进技术和模式（自动驾驶和分享经济），从而彻底改变未来驾驶对社会的意义。最重要的是电动汽车要让使用者享受到更优质的生活。

关于此次调研

为了要了解中国的汽车消费者目前和未来的需要与诉求，毕马威中国与汽车业市场调研机构 AutoForesight 联手对 220 位新能源汽车车主和潜在买车人士进行了一项调研。其中 100 位受访者是新能源汽车车主，而其余 120 位受访者则是潜在买车人士。八成的受访者年龄介于 30 到 35 岁

The China perspective

With EVs gaining traction in the China market and getting more acceptance in society as a real alternative to traditional ICE vehicles, Chinese consumers are raising the bar regarding their expectations of EVs to fulfil their mobility needs. Chinese consumers are realistic enough to realise that technology needs to improve in order to ensure safety; however, they have very clear expectations about how they see the role of EVs for themselves as well as for society. In a nutshell, EVs should meet their mobility needs (commuting and reasonable charging speed) and be environmentally friendly. They should revolutionise the way that future mobility will shape the society they are living in and be equipped with advanced technology (autonomous and sharing). Most importantly, they should improve consumers' lifestyle.

About this Survey

KPMG China and AutoForesight conducted a survey of 220 owners and potential owners of new energy vehicles in China to gain a better understanding of current and future consumer preferences for Chinese automobiles. One hundred respondents are owners of new energy vehicles, while 120 are potential owners. Eighty percent of the survey respondents are between 30 and 35 years old.

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