Sharing of the Insight Report on New Energy Vehicle Consumption
The total sample size of online survey is up to 205,000.

Total sample size: 205486

User geographical distribution
- East China: 35.3%
- North China: 15.8%
- South China: 13.9%
- Central China: 12.7%
- South West: 12.3%
- North West: 5.2%
- North East: 4.8%

User city level distribution
- First-tier cities: 20.2%
- Second-tier cities: 18.0%
- Third-tier cities: 12.5%
- Fourth-tier cities: 15.9%
- Fifth-tier cities: 17.4%
- Sixth-tier cities: 16.1%

Source: Autohome big data 2018.08

The samples cover car-free users, fuel vehicle owners, and new energy vehicle owners.

The status of the vehicles owned by the interviewed users

<table>
<thead>
<tr>
<th>Status of Vehicles</th>
<th>Car-free users</th>
<th>Fuel Vehicle Owners</th>
<th>New Energy Vehicle Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Intention</td>
<td>85.1%</td>
<td>73.0%</td>
<td>63.8%</td>
</tr>
<tr>
<td>No Purchase Intention</td>
<td>10.6%</td>
<td>27.0%</td>
<td>36.2%</td>
</tr>
</tbody>
</table>

Source: Online Survey, Autohome 2018.08
Market scale?

The new energy market will continue to grow rapidly.

New energy vehicles are a new growth point in the context of the overall sluggish market.

Users’ comparison behavior distribution between different energy types of vehicles

Source: Autohome big data 2018.08
More brands fail to participate in the competition in the new energy market, and the market concentration is reduced.

Number and sales concentration of vehicle series on sale

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of纯电动车 models on sale</th>
<th>Number of PHEV models on sale</th>
<th>Number of new energy brands on sale</th>
<th>Concentration of top 10 new energy brands (pure electric vehicle)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>57</td>
<td>9</td>
<td>34</td>
<td>89.8%</td>
</tr>
<tr>
<td>2017</td>
<td>104</td>
<td>40</td>
<td>64</td>
<td>79.9%</td>
</tr>
<tr>
<td>2018</td>
<td>154</td>
<td>54</td>
<td>91</td>
<td>77.9%</td>
</tr>
</tbody>
</table>

Source: mandatory vehicle insurance data, Product Library, Autohome 2019.02

The new energy automobile market has been subdivided into several competing circles (2018.08)
The "oil to electricity" pure tram has been gradually replaced by the new platform vehicle (2019.02)

Note: Bubble size represents the number of sales leads in this month, and sales leads are positively correlated. Bubble locations represent the distance of competition; the closer the competition relationship, the stronger the competition relationship; the closer the competition relationship, the higher the coincidence degree of users. The line between bubbles represents the car models. The number of comparisons, the thicker the connection, indicates that users will compare the two models more.
About half of the vehicle owners do not have their own charging piles.

### Distribution of residential locations

- Core areas of cities: 23.0%
- Non-core areas of cities: 38.0%
- Periphery of cities: 16.6%
- Suburban counties: 13.4%
- Rural: 7.9%

Source: Autohome Big Data 2018.08

### Parking spaces possessed

- Having your own garage / yard allowing parking: 26.6%
- Renting fixed parking spaces: 12.3%
- Renting non-fixed parking spaces: 11.6%
- No parking space: 25.2%

### Situation of charging piles

- The parking space has been fitted with a charging pile: 3.1%
- Yes, considering installation in the future: 36.0%
- Yes, but needing consultation with the property/owner: 22.8%
- Not sure if it can be installed: 26.4%
- The property/owner doesn’t allow installation: 3.2%
- The parking space facilities are not suitable for installation: 9.0%

Source: Autohome Big Data 2018.08

The availability of parking spaces for users in different residential areas

Source: Autohome Big Data 2018.08
The high acceptability of the cities where issuance of vehicle licenses is restricted comes from license pressure; the long-term acceptability of the cities where issuance of vehicle licenses is not restricted is higher.

The impact of whether issuance of fuel vehicle licenses is restricted on the acceptability to new energy vehicles

Cities where issuance of vehicle licenses is restricted
Cities where issuance of vehicle licenses is not restricted

Purchasing vehicles
Purchasing vehicles in the next three months
Purchasing vehicles in the next six months
Purchasing vehicles in the next year

Source: Autohome big data 2018.08

“Mileage anxiety” is still the biggest problem facing new energy vehicle users.

Reasons for users’ acceptance of new energy vehicles

<table>
<thead>
<tr>
<th>Reason</th>
<th>Restricted Cities</th>
<th>Non-restricted Cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental protection</td>
<td>56.7%</td>
<td>66.7%</td>
</tr>
<tr>
<td>Quiet; good driving feels</td>
<td>39.3%</td>
<td>49.8%</td>
</tr>
<tr>
<td>Fast acceleration and strong power</td>
<td>31.4%</td>
<td>49.8%</td>
</tr>
<tr>
<td>Higher degree of electrification</td>
<td>17.2%</td>
<td>20.6%</td>
</tr>
<tr>
<td>Favorite vehicle model</td>
<td>16.2%</td>
<td>17.6%</td>
</tr>
<tr>
<td>Issuance of vehicle licenses is restricted</td>
<td>17.1%</td>
<td>50.7%</td>
</tr>
</tbody>
</table>

Source: Autohome big data 2018.08

Reasons for users’ rejection of new energy vehicles

<table>
<thead>
<tr>
<th>Reason</th>
<th>Restricted Cities</th>
<th>Non-restricted Cities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incremental charging</td>
<td>76.1%</td>
<td>77.9%</td>
</tr>
<tr>
<td>Short continuous travel distance</td>
<td>40.5%</td>
<td>46.7%</td>
</tr>
<tr>
<td>High battery replacement cost</td>
<td>45.9%</td>
<td>42.6%</td>
</tr>
<tr>
<td>Charging time</td>
<td>45.9%</td>
<td>42.6%</td>
</tr>
<tr>
<td>Short battery lifetime</td>
<td>35.9%</td>
<td>36.8%</td>
</tr>
<tr>
<td>High price</td>
<td>30.9%</td>
<td>34.2%</td>
</tr>
<tr>
<td>Low residual value of used vehicles</td>
<td>29.0%</td>
<td>22.6%</td>
</tr>
<tr>
<td>Poor driving experience</td>
<td>17.4%</td>
<td>14.7%</td>
</tr>
</tbody>
</table>
Where are the users?

More than 70% of the users are willing to accept new energy vehicles.

Acceptability of the user to new energy vehicles

- First purchase: 68.2%
- Additional purchase or replacement purchase: 73.7%
- Fuel Vehicle Owners: 73.2%
- New Energy Vehicle Owners: 89.6%

Source: Autohome big data 2018.08

The cities with high acceptability are mainly the cities where issuance of new vehicle licenses is not restricted.

Acceptability of new energy vehicles in provinces

Acceptability of the cities where issuance of fuel vehicle licenses is restricted to new energy vehicles

- Guangzhou: 74.0%
- Shenzhen: 72.9%
- Hangzhou: 72.3%
- Shanghai: 72.2%
- Shenyang: 72.0%
- Hangzhou: 71.9%
- Tianjin: 71.4%
- Beijing: 64.0%

Source: Autohome big data 2018.08
New energy vehicle owners in the cities where issuance of vehicle licenses is restricted have high demand for continuous travel distance.

### Daily driving mileage

<table>
<thead>
<tr>
<th>Distance</th>
<th>Cities where issuance of vehicle licenses is restricted</th>
</tr>
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<tbody>
<tr>
<td>More than 100 km</td>
<td>11.7%</td>
</tr>
<tr>
<td>90-100 km</td>
<td>6.0%</td>
</tr>
<tr>
<td>80-90 km</td>
<td>6.5%</td>
</tr>
<tr>
<td>70-80 km</td>
<td>7.0%</td>
</tr>
<tr>
<td>60-70 km</td>
<td>10.8%</td>
</tr>
<tr>
<td>50-60 km</td>
<td>9.8%</td>
</tr>
<tr>
<td>40-50 km</td>
<td>12.6%</td>
</tr>
<tr>
<td>30-40 km</td>
<td>14.0%</td>
</tr>
<tr>
<td>20-30 km</td>
<td>11.8%</td>
</tr>
<tr>
<td>10-20 km</td>
<td>4.6%</td>
</tr>
<tr>
<td>Within 10 km</td>
<td>4.6%</td>
</tr>
</tbody>
</table>

### Cities where issuance of vehicle licenses is not restricted

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</tr>
<tr>
<td>40-50 km</td>
<td>3%</td>
</tr>
<tr>
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<tr>
<td>Within 10 km</td>
<td>6.7%</td>
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Source: Autonhome big data 2018.08
Who is the user?

Tesla owners basically have their own parking spaces and long commuting distance

Roewe eRX5 owners with bachelor degree or above account for nearly 70%
The daily driving mileage of BYD e5 owners is significantly higher than that of other models.

A Zotye E200 owner has more than one vehicle; E200 is only used for urban commuting.
How to impress users

Budget below 200,000 budget; new energy users value continuous travel distance

2hr charging, 500km continuous travel distance

Acceptability to the continuous travel distance of new energy vehicles

Acceptability to the charging time of new energy vehicles

Source: Autohome big data 2018.08
Users hope that the price of new energy vehicles is equal to or lower than that of fuel vehicles.

Private charging piles have a low proportion; expressways and residential areas urgently need to be fitted with public charging piles.
Service quality higher than service mode

PHEV models are more popular with users if there is no policy impact.
As the budget rises, users are more inclined to choose SUVs.

Source: Autohome big data
2018.08
New Contents in 2019

Four new analytical dimensions in 2019

- Research on user depth
  - User segmentation
  - User demand tapping

- New Technology Requirements
  - Intelligent network connection, automatic driving, shared travel
  - Users’ attitude and worry
  - Users’ use

- Brand content refinement
  - Acceptability to new vehicle manufacturing power
  - Brand image
  - Brand loyalty

- Service Model Expectations
  - Vehicle purchase channel preference
  - Financial loan acceptability
  - Acceptability to used new energy vehicles
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