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2024 Global Automotive Consumer Study

Southeast Asia perspectives

MAKING AN IMPACT THAT MATTERS since 1845

March 2024

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For over a decade, Deloitte has been exploring automotive consumer behaviours and trends impacting a rapidly evolving global mobility ecosystem. The goal of this annual study is to answer important questions that can help companies prioritise and better position their business strategies and investments.

From September through October 2023, we surveyed more than 27,000 consumers in 26 geographies around the world to explore opinions regarding a variety of critical issues impacting the automotive sector, including consumer interest in electric vehicles (EVs), brand perceptions, and connected technology adoption.

The study was fielded using an online panel methodology, where consumers of driving age were invited to complete the questionnaire (translated into local languages) via email.

Southeast Asia perspectives
Within the Southeast Asia region, 5,939 survey respondents across six geographies – Indonesia (n= 1,005), Malaysia (n= 957), Philippines (n= 1,000), Singapore (n= 1,000), Thailand (n= 1,000), Vietnam (n= 977) – were covered in the study. Overall, our findings have revealed four emerging trends impacting the global mobility ecosystem:

Vehicle electrification
High interest rates and elevated sticker prices may be causing consumer interest in EVs to soften in some markets. Despite original equipment manufacturer (OEM) price cuts and government incentives designed to make them more affordable, a variety of other challenges continue to stand in the way, including availability of charging infrastructure, charging time, range anxiety, and cost.

Future vehicle intentions
Product quality tops the list of factors driving the choice of vehicle brand for consumers in most Southeast Asia markets, including Indonesia, Malaysia, Thailand, and Vietnam, while vehicle performance and price are top of mind for consumers in the Philippines and Singapore respectively.

Connectivity
Among those who are interested in connected vehicles, there is a relatively high level of interest in features that provide updates on maintenance, road safety, and traffic congestion. Unlike other markets, the willingness to pay extra for connected technologies remains relatively high across all Southeast Asia markets except in Singapore.

Vehicle subscriptions
Against the backdrop of uncertain economic conditions causing concern for financial capacity, a significant number of younger consumers in many markets are at least somewhat interested in giving up vehicle ownership altogether in favour of a subscription model, but concerns about vehicle availability, total ownership cost, and the perception of higher monthly fees persist.

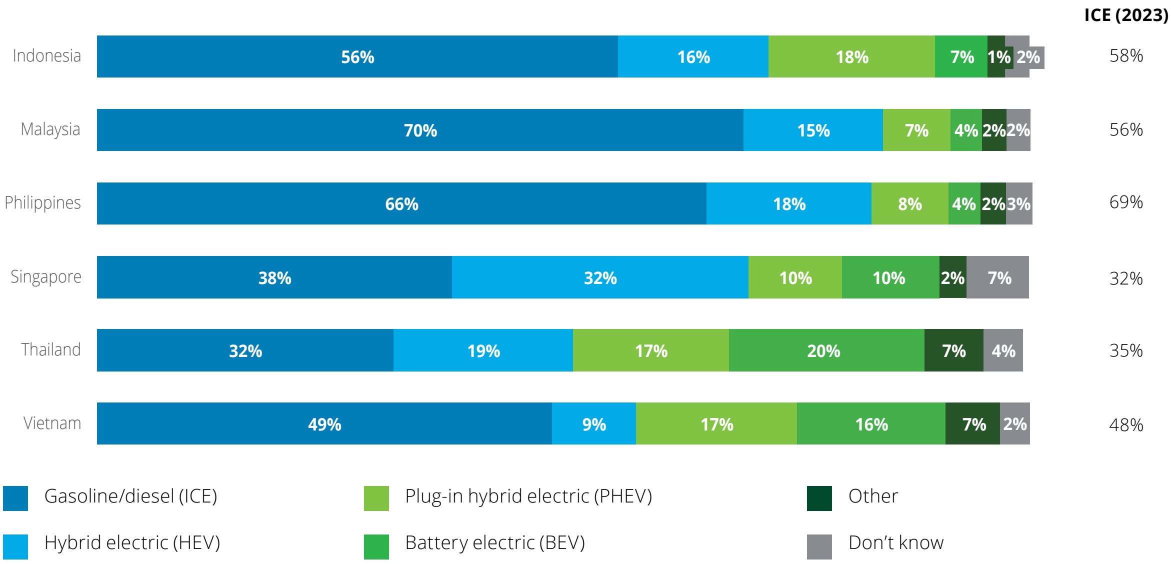
1. Vehicle electrification

Vehicle electrification

Preference in type of engine for next vehicle

Consumer interest in internal combustion engine (ICE) vehicles is rebounding in Malaysia and Singapore as affordability and other concerns regarding EVs continue to weigh heavily on forward intentions.

Preference for type of engine in next vehicle



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; percentages may not add to 100 due to rounding.
Q32. What type of engine would you prefer in your next vehicle?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Motivations for choosing EVs

The main reason consumers intend to acquire an electrified vehicle stems from a strong desire to lower their operating (i.e., fuel) costs – outstripping the concern for climate change in all markets except Vietnam.

Top reasons to choose an EV as next vehicle

Factors	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Concern for the environment	67%	53%	65%	42%	71%	**64%**
Concern about personal health	52%	38%	44%	23%	49%	57%
Lower fuel costs	**69%**	**65%**	**79%**	**61%**	**73%**	**64%**
Less maintenance	52%	48%	51%	44%	49%	37%
Ability to use the vehicle as a backup battery/power source	46%	44%	48%	26%	25%	36%
Peer pressure	7%	13%	8%	5%	15%	17%
Driving experience	57%	59%	49%	39%	38%	54%
Government incentives/subsidies/ stimulus programs	39%	50%	32%	46%	31%	42%
Potential for extra taxes/levies applied to internal combustion vehicles	33%	31%	25%	32%	30%	22%
Potential ban on sale of new internal combustion vehicles	26%	20%	19%	18%	18%	17%
Other	0%	0%	1%	1%	0%	1%

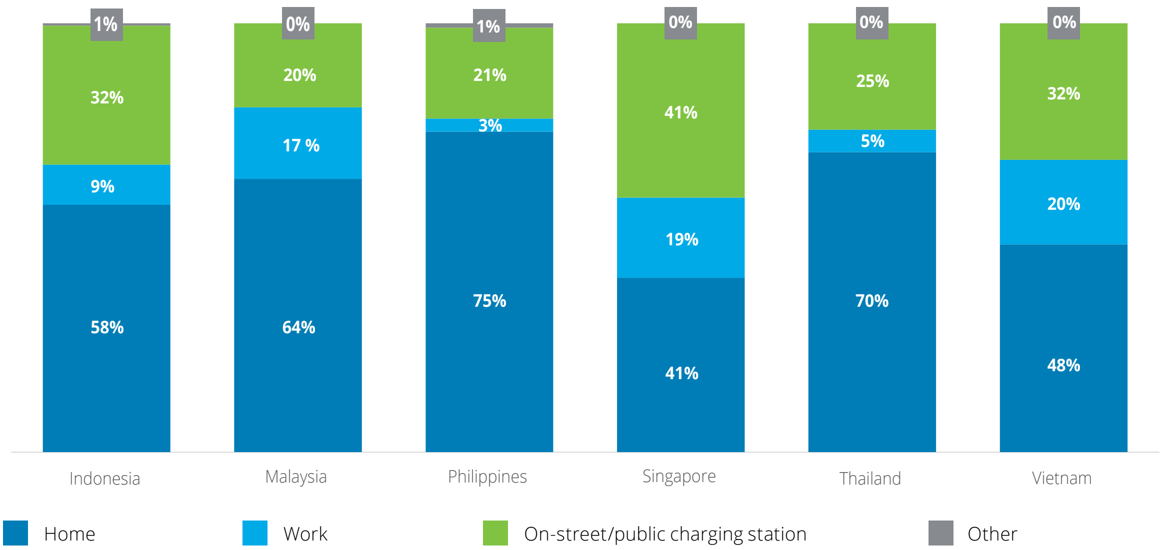
Top reasons

Q34. Which of the following factors have had the greatest impact on your decision to acquire an electrified vehicle? (Please select all that apply.)
Sample size: n= 302 [Indonesia]; 224 [Malaysia]; 248 [Philippines]; 401 [Singapore]; 521 [Thailand]; 368 [Vietnam]

Expectations for EV charging facilities

Building public charging capacity is still needed to address consumer concerns over range anxiety, but the reality of day-to-day usage means most people will charge their EVs at home.

Expecting to charge electrified vehicle most often at...



Note: Percentages may not add to 100 due to rounding.
Q35: Where do you expect to charge your electrified vehicle most often?
Sample size: n= 182 [Indonesia]; 95 [Malaysia]; 99 [Philippines]; 155 [Singapore]; 343 [Thailand]; 289 [Vietnam]

Location preference for EV charging facilities

Even though consumers want to maximise their convenience by having a public EV charger readily available whenever they need it, more strategic oversight is needed to maximise the return on invested capital to build out national public charging networks.

Public locations that the consumers would prefer to charge their EV when they are away from their home

Public places	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Dedicated EV charging station equipped with amenities	25%	17%	25%	20%	21%	26%
Traditional gas station with EV chargers	26%	18%	23%	4%	**34%**	13%
Vehicle dealership	0%	4%	1%	3%	1%	1%
Retail outlet/mall	2%	6%	4%	5%	15%	7%
Parking lot (e.g., metro stations, airports, public lots/garages)	7%	19%	9%	25%	3%	11%
On-street parking	0%	1%	0%	5%	1%	7%
Community/public building	0%	2%	2%	5%	1%	6%
Hotel or peer-to-peer rental	1%	0%	0%	3%	0%	1%
Any location as long as I can find a charger when I need it	**38%**	**33%**	**35%**	**32%**	24%	**29%**
Other	1%	0%	0%	0%	0%	0%

Most preferred by consumers

Note: Percentages may not add to 100 due to rounding.
Q37: Where would you most want to charge your EV when you are away from home (i.e., public charging location)?
Sample size: n= 182 [Indonesia]; 95 [Malaysia]; 99 [Philippines]; 155 [Singapore]; 343 [Thailand]; 289 [Vietnam]

Preferred payment methods for public charging

When it comes to paying for public EV charging, consumers in most markets prefer the familiarity and convenience of using either smartphone applications or credit/debit cards, emphasising the need to focus on flexible payment processes to eliminate potential friction.

Most preferred way to pay for public EV charging

Payment methods	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Charging network app on your smartphone	**68%**	**42%**	25%	28%	**65%**	**61%**
Credit/debit card	15%	**42%**	**41%**	**60%**	21%	21%
Pre-paid subscription plan	11%	5%	15%	5%	2%	10%
Loyalty points	1%	9%	4%	3%	4%	3%
Third-party payment platform	5%	1%	13%	4%	7%	4%
Other	0%	1%	1%	1%	2%	1%

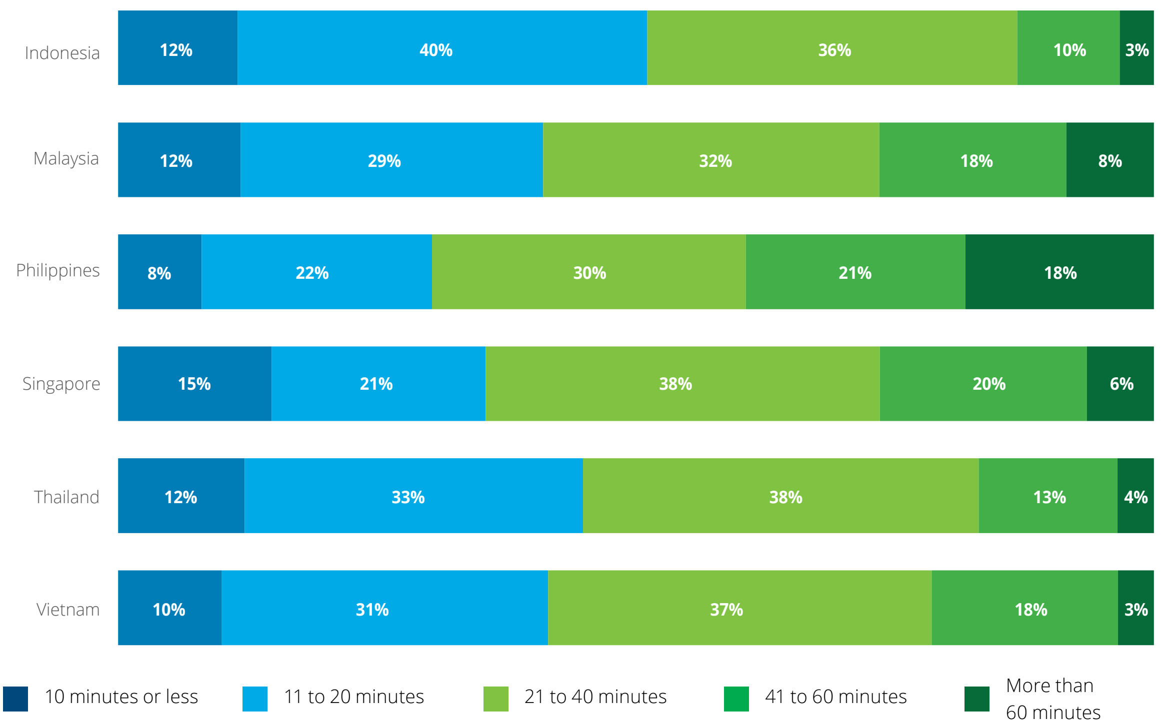
Most preferred mode of payment

Note: Percentages may not add to 100 due to rounding.
Q40: How would you most prefer to pay for public EV charging?
Sample size: n= 182 [Indonesia]; 95 [Malaysia]; 99 [Philippines]; 155 [Singapore]; 343 [Thailand]; 289 [Vietnam]

Expected charge times

The assumption that EV charge times need to be on par with fossil fuel fill-ups may be somewhat overstated as surveyed consumers in all Southeast Asia markets are willing to wait longer than 10 minutes to refuel.

Expected wait time to charge an EV at public charging stations from **empty to 80%**

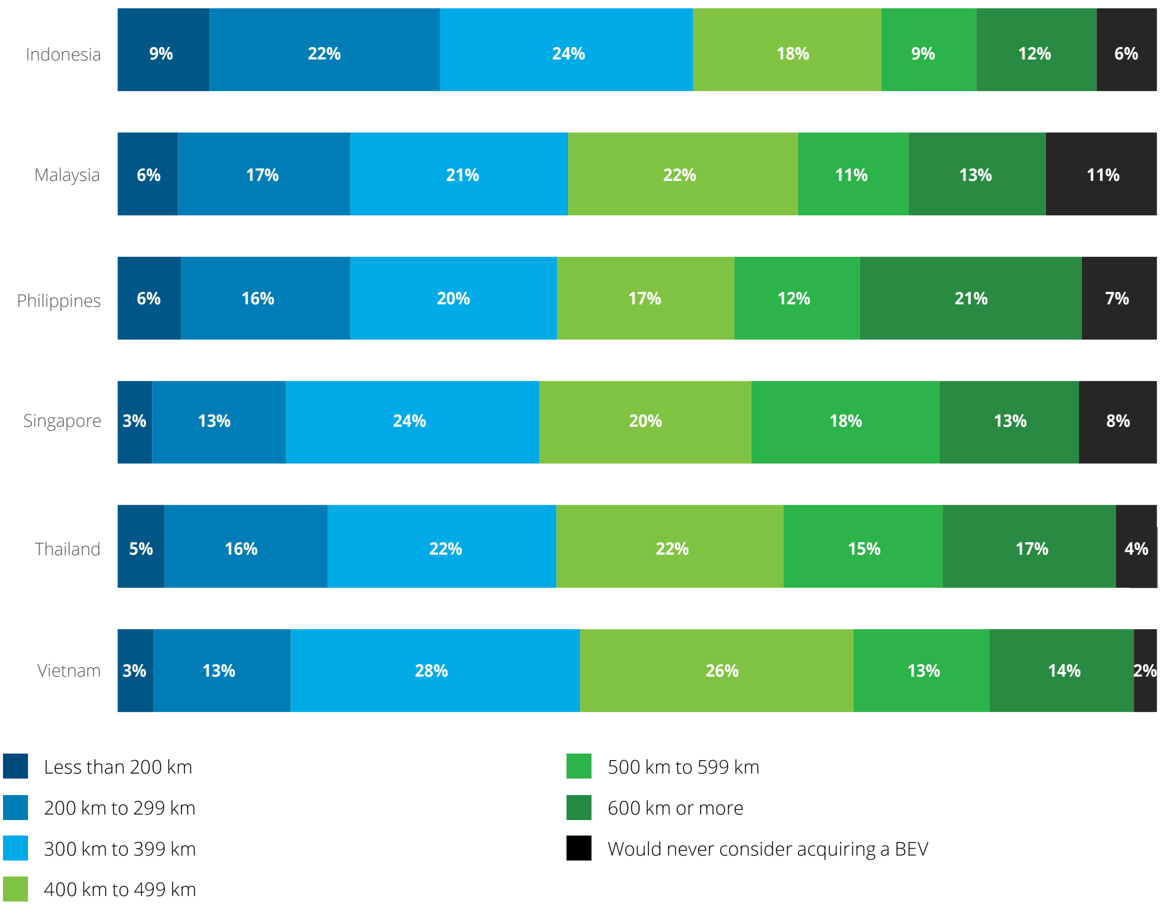


Note: Percentages may not add to 100 due to rounding.
Q38: How long do you expect it to take to charge your EV from empty to 80% at a public charging location?
Sample size: n= 182 [Indonesia]; 95 [Malaysia]; 99 [Philippines]; 155 [Singapore]; 343 [Thailand]; 289 [Vietnam]

Expected driving range of battery electric vehicles (BEVs)

At least 4 in 10 non-BEV intenders across all Southeast Asia markets would expect a fully charged BEV to have a driving range of at least 400 km in order to consider one as a viable option for their next vehicle.

Consumer expectations on BEV driving range

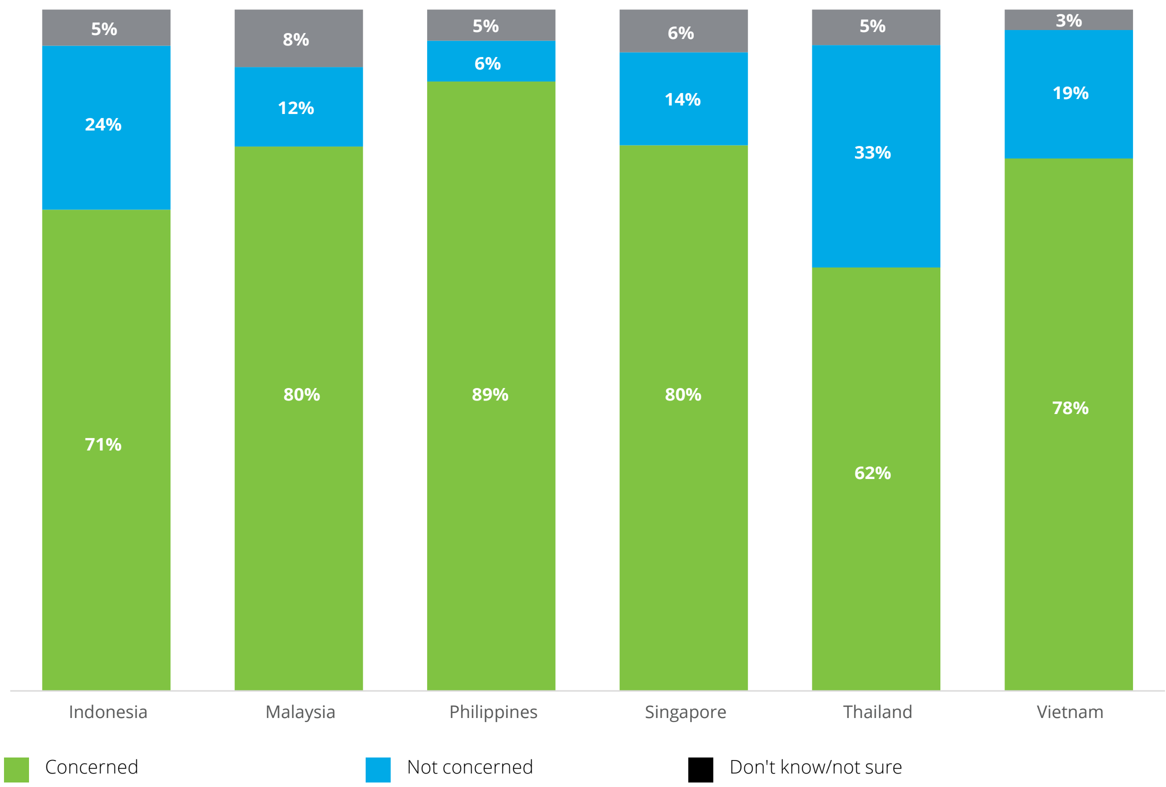


Note: Percentages may not add to 100 due to rounding.
Q44: How far would a fully charged all-battery electric vehicle need to go in order for you to consider acquiring one
Sample size: n= 690 [Indonesia]; 825 [Malaysia]; 804 [Philippines]; 692 [Singapore]; 732 [Thailand]; 726 [Vietnam]

Concerns on environmental impact of EV battery

A majority of consumers are concerned about the "cradle to grave" environmental impact of an EV battery, requiring industry stakeholders to implement sustainable practices across the entire battery life cycle.

Percentage of consumers concerned about the end-to-end environmental impact of an EV battery



Not concerned % include not at all concerned or not very concerned; Concerned % include somewhat concerned or very concerned; percentages may not add to 100 due to rounding.
Q46. To what extent are you concerned about the end-to-end environmental impact of an EV battery (e.g., mineral mining, manufacturing, source of electricity during multiple lifecycles, end-of-life recycling)?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Concerns regarding use of BEVs

When it comes to BEVs, surveyed consumers are generally most concerned about a lack of charging infrastructure, charging time, range anxiety, and cost.

Greatest concern regarding all battery-powered electric vehicles

Concern	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Driving range	49%	43%	45%	33%	39%	**49%**
Cost/price premium	27%	**47%**	39%	40%	36%	29%
Cold weather performance	39%	21%	25%	15%	20%	27%
Increased need to plan my trips	15%	23%	23%	22%	22%	16%
Uncertain resale value	37%	25%	22%	22%	25%	21%
Potential for extra taxes/levies associated with all-BEVs	19%	24%	22%	20%	22%	16%
Time required to charge	51%	44%	48%	**47%**	36%	47%
Ongoing charging and running costs	34%	32%	32%	29%	42%	32%
Cost to eventually replace the battery	43%	40%	43%	35%	43%	22%
Lack of knowledge or understanding about EVs/ EV technology	35%	32%	35%	22%	25%	46%
Lack of public electric vehicle charging infrastructure	**56%**	45%	**53%**	38%	**46%**	25%
Lack of charger at home	36%	35%	35%	37%	29%	29%
Lack of alternate power source at home	18%	28%	39%	22%	23%	39%
Safety concerns with battery technology	40%	39%	46%	34%	37%	29%
End-to end sustainability	21%	25%	34%	22%	20%	13%
Lack of choice regarding brands/models	13%	23%	18%	15%	27%	4%
Other	0%	0%	0%	1%	0%	0%

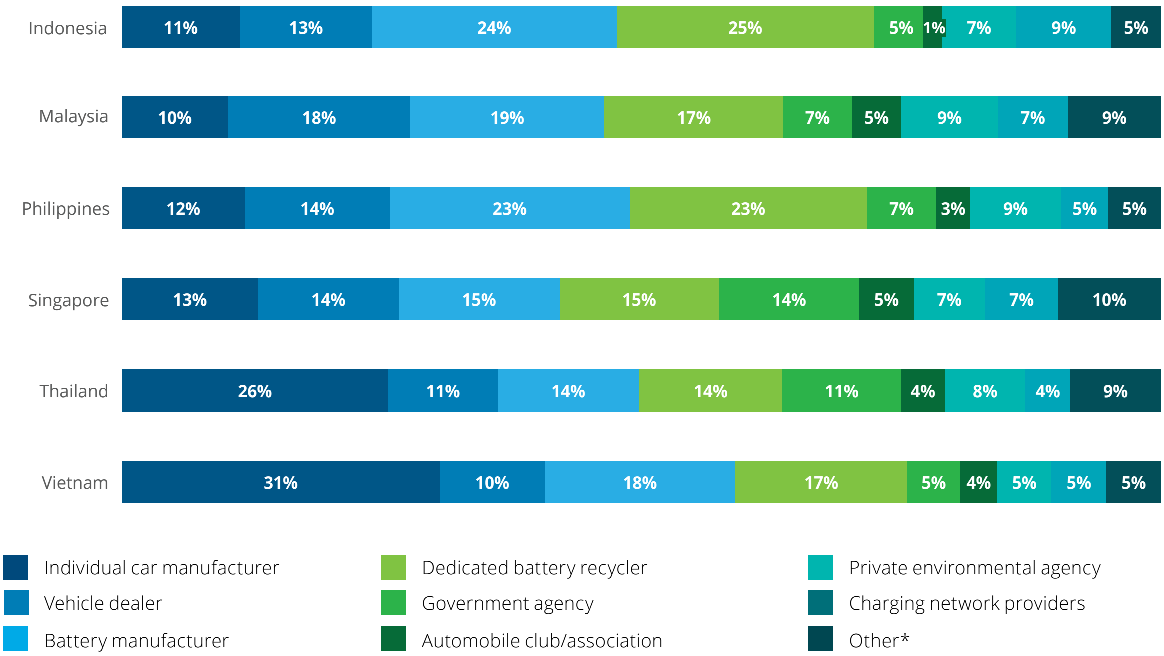
Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q43: What are your biggest concerns regarding all battery-powered electric vehicles? Please select all that apply.
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Solutions for EV batteries after useful life

A variety of stakeholders involved in the EV battery value chain need to work together to develop a successful solution for collecting, storing, and recycling batteries after their useful life.

Entity responsible for collecting, storing, and recycling EV batteries **after** their useful lives



*includes don't know or don't care.
Note: Percentages may not add to 100 due to rounding.
Q47: Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

2.

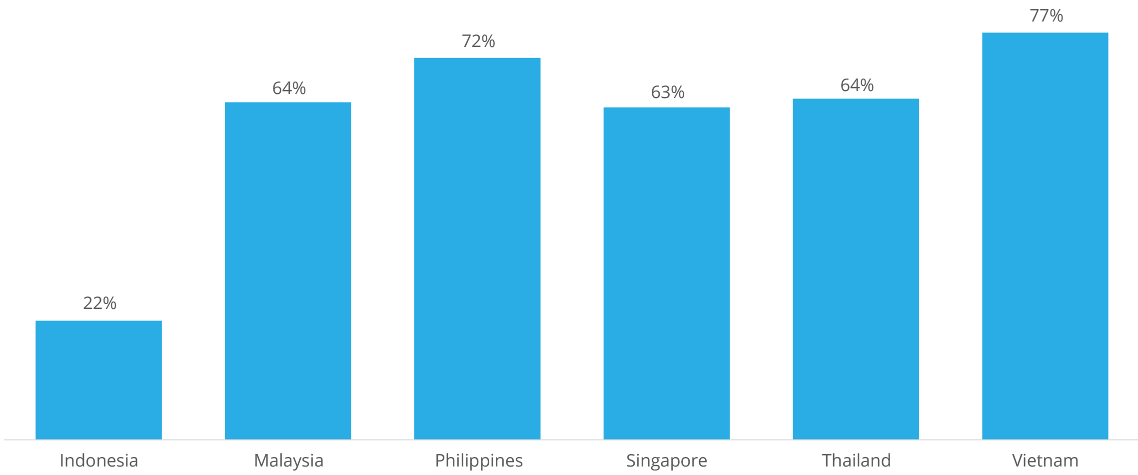
Future vehicle intentions

Future vehicle intentions

Intention to switch vehicle brands for next vehicle purchase

A majority of consumers, across most Southeast Asia markets except Indonesia, intend to switch vehicle brands for their next purchase.

Percentage of consumers switching to another brand* of vehicle



*includes switching to a different brand from the same parent or a different brand from a different sales parent
Q5. What brand is the vehicle you drive most often?; Q17. What brand are you considering most for your next vehicle? [Brand switching percentage is based on a calculation involving these two questions.]
Sample size: n= 507 [Indonesia]; 809 [Malaysia]; 499 [Philippines]; 589 [Singapore]; 740 [Thailand]; 663 [Vietnam]

Reasons to switch vehicle brand

For most consumers, the intention to switch vehicle brands comes down to a desire to gain access to new features or to try something different. However, affordability concerns are also among the top reasons to make a change in some markets as consumers continue to feel the pressure of current economic conditions.

Most important reasons for switching to another brand of vehicle

Important reasons for switching to another brand	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Lack of readily available vehicle	22%	8%	5%	8%	7%	8%
New brand has technology/features I want	45%	45%	53%	32%	**52%**	**48%**
Poor customer experience with the current brand	14%	6%	4%	7%	11%	14%
Cost/affordability	30%	30%	30%	33%	36%	22%
Incentives offered by the intended brand	21%	18%	14%	14%	11%	23%
Upgrading to a premium brand	35%	30%	26%	21%	21%	36%
I just want to try something different	**51%**	**53%**	**57%**	**44%**	49%	**48%**
Cost of servicing the current brand is too high	21%	15%	12%	16%	21%	19%
Current brand lacks greener vehicle models that I want	17%	13%	8%	16%	21%	29%
Other	2%	2%	1%	2%	2%	1%

Top reasons

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q18. Why are you considering a switch to another vehicle brand? Please select all that apply.
Sample size: n= 114 [Indonesia]; 516 [Malaysia]; 360 [Philippines]; 370 [Singapore]; 477 [Thailand]; 510 [Vietnam]

Purchase considerations for next vehicle

Depending on the market, what matters most to consumers as they think about their next vehicle brand is either product quality, performance, or price. Vehicle features are also important for consumers in the Philippines, Thailand, and Vietnam.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Previous sales experience	18%	15%	11%	9%	13%	11%
Previous service experience	35%	18%	18%	17%	21%	18%
Product quality	**74%**	**64%**	69%	56%	**53%**	**60%**
Brand advertising	12%	16%	12%	9%	16%	15%
Brand image	39%	27%	39%	27%	34%	34%
Brand affiliations	13%	11%	9%	9%	17%	12%
Brand familiarity	30%	35%	38%	29%	31%	28%
Quality of overall ownership experience	49%	37%	41%	31%	29%	38%
Vehicle features	52%	49%	60%	38%	53%	50%
Availability of battery electric vehicles/hybrid options	24%	18%	30%	24%	29%	20%
Vehicle performance	64%	55%	**71%**	52%	51%	48%
Price	58%	59%	57%	**58%**	47%	45%
Other	1%	1%	0%	1%	1%	0%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q19. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Priorities for the vehicle purchase experience

It may be difficult to move to an entirely online purchase process in many markets as consumers still say they need to physically interact with the vehicle and negotiate in-person the next time they are in-market.

Level of agreement on various aspects of the purchase experience (% somewhat/strongly agree)

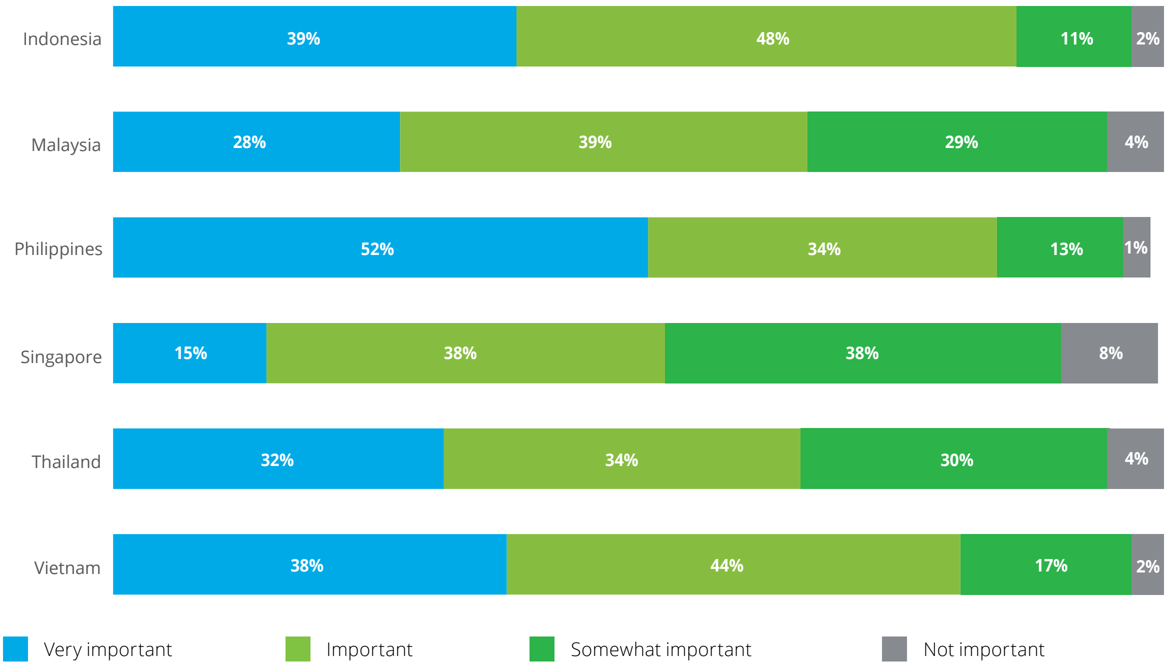
Aspect of vehicle purchase experience	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
I want to interact with real people	90%	84%	92%	85%	77%	81%
I want to negotiate in-person to get the best deal	**93%**	84%	**93%**	88%	91%	**88%**
I need to physically interact with the vehicle before I buy it	91%	**85%**	**93%**	**89%**	**92%**	82%
I have to test drive the vehicle to make sure it's right for me	**93%**	84%	**93%**	**89%**	91%	87%
I prefer to limit the need to visit a dealership in person	43%	60%	55%	59%	36%	41%
I want to build a relationship with a dealer for future service needs	80%	72%	87%	75%	78%	73%

Q31: Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

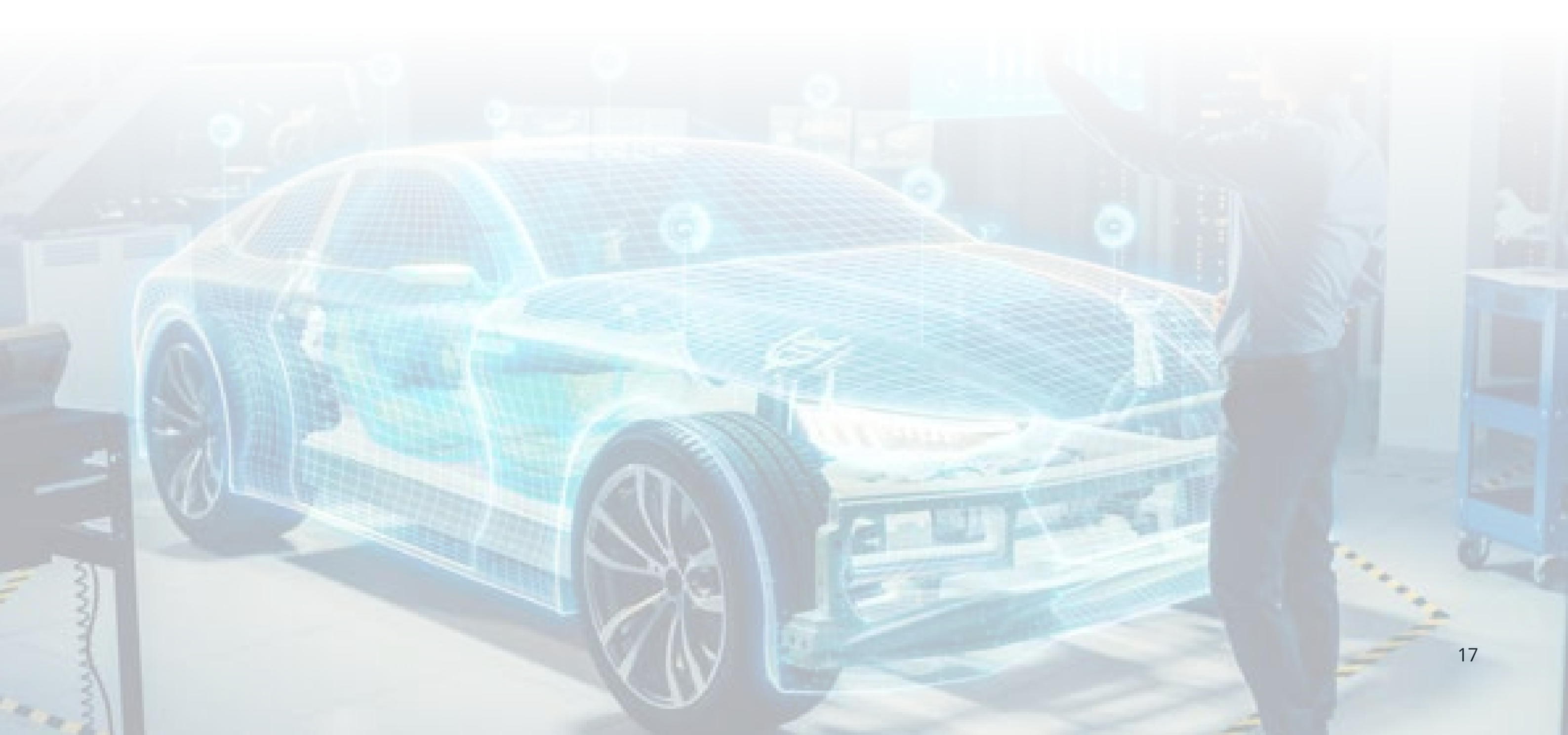
Importance of vehicle brands' commitment to sustainable practices

The majority of consumers, across all Southeast Asia markets, think it is important for vehicle brands to have a strong commitment to sustainable manufacturing practices such as the use of environmentally friendly materials and a low carbon manufacturing footprint.

Importance of a vehicle brand committing to sustainable practices



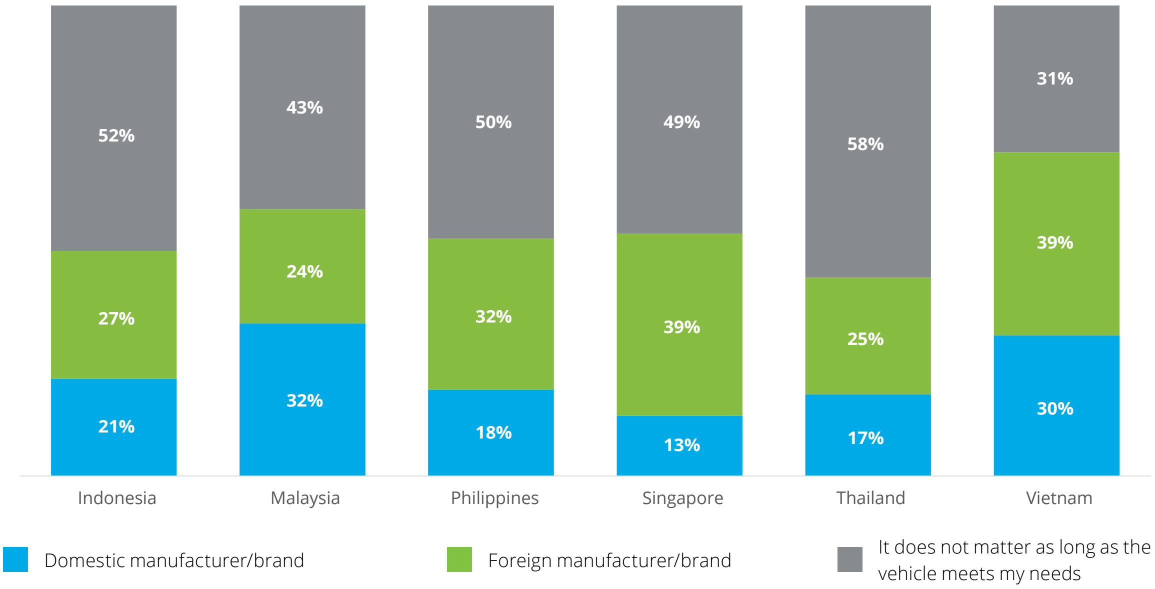
Note: Percentages may not add to 100 due to rounding.
Q20: When thinking about choosing your next vehicle, how important will it be for a vehicle brand to have a strong commitment to sustainable practices (e.g., low carbon manufacturing footprint, use of environmentally friendly materials, electrification strategy)?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]



Preferred vehicle manufacturer

Consumer affinity to domestic vs. foreign vehicle brands varies across Southeast Asia markets, but a significant number of people in each market are indifferent as long as the vehicle they are interested in meets their needs.

Preferred organisations for next vehicle purchase

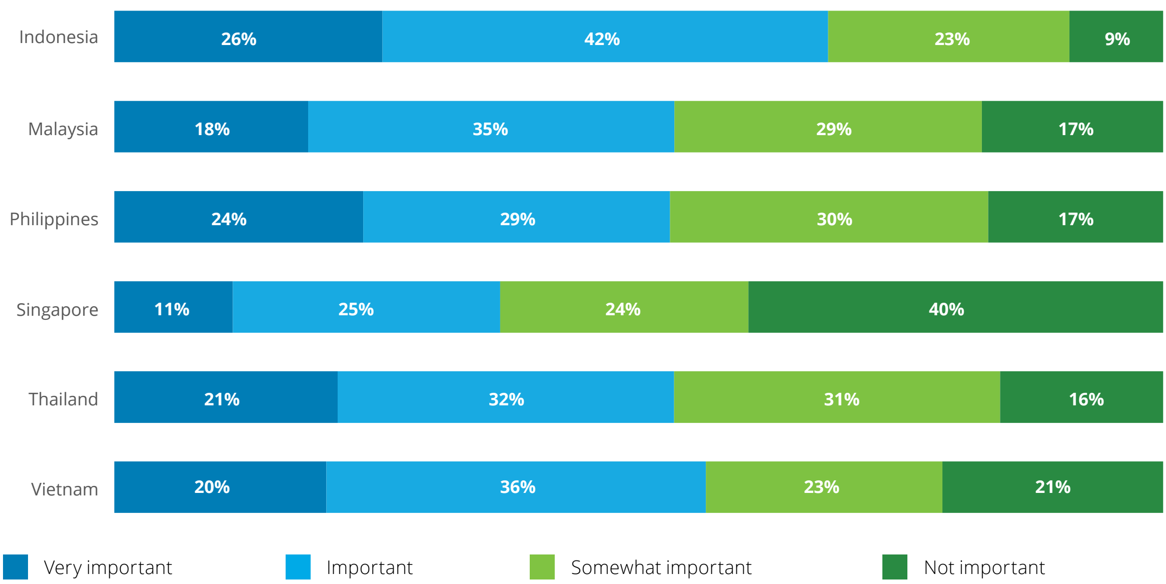


Note: Percentages may not add to 100 due to rounding.
Q45: From which of the following type of organisations are you most interested in acquiring your next vehicle?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Importance of locally manufactured vehicle

Except for Singapore, consumers surveyed consider whether the vehicle is locally produced or not when choosing their next vehicle.

Importance of next vehicle to be manufactured locally



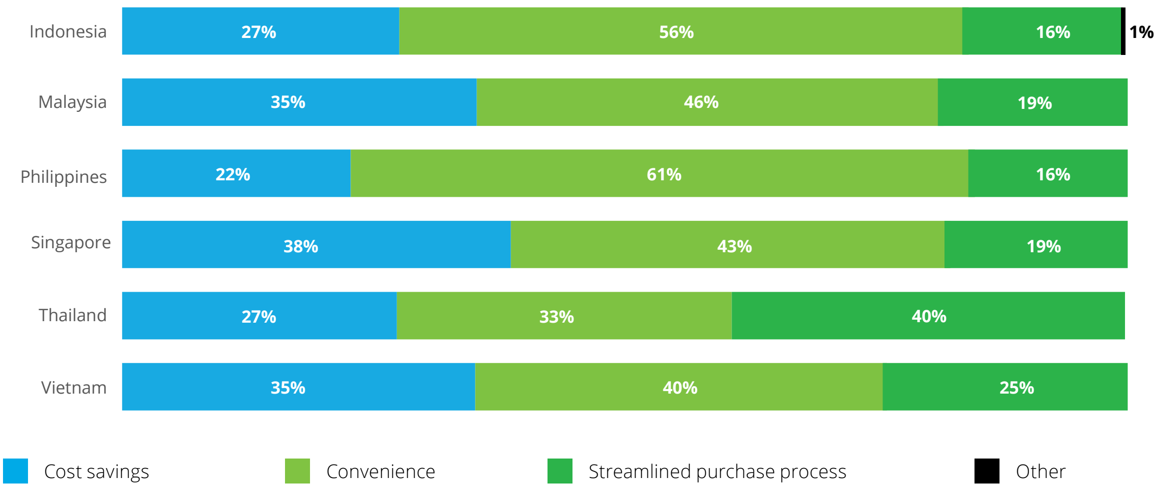
Note: Percentages may not add to 100 due to rounding.
Q21: To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your market or region)?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Interest and expectations of insurance purchase

As original equipment manufacturers (OEMs) look at every potential profit pool going forward, surveyed consumers in several markets are signalling a significant level of interest in manufacturer branded insurance products based on the perception that it will be convenient and cost-effective.

Percentage of surveyed consumers who would be interested in purchasing insurance directly from the manufacturer

For those consumers who are interested in purchasing insurance directly from the manufacturer, primary benefits are...



Note: Percentages may not add to 100 due to rounding.
Q52: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer? Q53: What do you believe the primary benefit of buying insurance directly from the manufacturer to be?
Sample size: n for Q52= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]; n for Q53= 484 [Indonesia]; 508 [Malaysia]; 614 [Philippines]; 421 [Singapore]; 747 [Thailand]; 662 [Vietnam]

3. Connectivity

Connectivity

Interest in connected vehicle features

Consumers in most Southeast Asia markets are interested in receiving maintenance updates, vehicle health reporting, and updates to improve road safety even if it meant sharing their personal data.

Level of consumer interest in connected vehicle features (% very/somewhat interested)

Connected vehicle features	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Updates regarding traffic congestion and suggested alternate routes	83%	71%	87%	72%	79%	**85%**
Suggestions regarding safer routes (i.e., avoid unpaved roads)	80%	68%	85%	69%	82%	84%
Updates to improve road safety and prevent potential collisions	**87%**	72%	**88%**	71%	83%	84%
Customised/optimised vehicle insurance plan (e.g., "pay how you drive" plans)	74%	64%	69%	63%	85%	78%
Maintenance updates and vehicle health reporting/alerts	84%	**73%**	87%	**73%**	**89%**	**85%**
Maintenance cost forecasts based on your driving habits	77%	67%	78%	71%	85%	80%
Customised suggestions regarding ways to minimise service expenses	78%	68%	81%	68%	84%	80%
Over-the-air vehicle software updates that correct operational faults or improve your driving experience	78%	65%	76%	67%	84%	81%
Access to nearby parking (i.e., availability, booking, and payment)	75%	67%	81%	**73%**	76%	79%

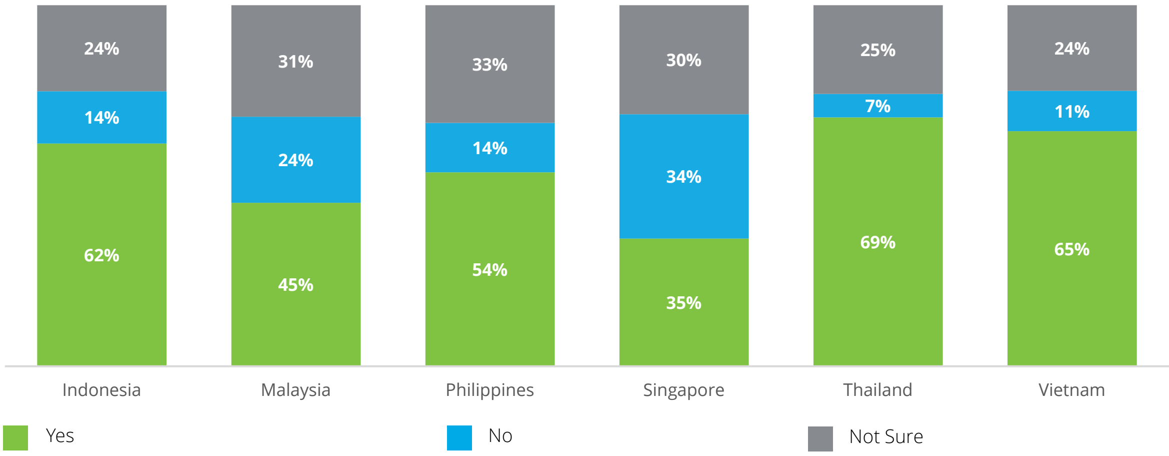
Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options; personally identifiable information.
Q49: How interested are you in the following benefits of a connected vehicle if it meant sharing your own personally identifying data and/or vehicle/operational data with the manufacturer or a third party?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Willingness to pay for connectivity features

The willingness to pay for connected features is more pronounced in most Southeast Asia markets compared to many other global markets, except Singapore where only one-third of people are ready to pay for such features.

Willingness to pay extra for connectivity features



Note: Percentages may not add to 100 due to rounding.
Q50. Are you willing to pay extra for these features (i.e., paying a monthly subscription)?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

Trusted entity in managing connected vehicle data

In most markets surveyed, consumers trust car manufacturers the most when it comes to managing connected vehicle data. At the same time, consumers in Singapore would most trust government agencies.

Most trusted entity for managing connected vehicle data

Most trusted entity	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Car manufacturer	**25%**	**24%**	**35%**	20%	**31%**	**36%**
Vehicle dealer	18%	17%	16%	11%	18%	10%
Financial service provider	4%	8%	6%	7%	5%	2%
Insurance company	11%	17%	16%	10%	13%	8%
Automobile club or association	6%	4%	3%	5%	6%	5%
Cellular service provider	7%	5%	4%	4%	5%	7%
Cloud service provider	11%	4%	6%	4%	4%	7%
Government agency	11%	9%	6%	**23%**	11%	15%
Other	0%	0%	0%	0%	0%	0%
None of the above	6%	10%	7%	15%	7%	9%

Most commonly cited

Note: Percentages may not add to 100 due to rounding.
Q51. In a scenario where you owned a connected vehicle, who would you trust most with access to the data your vehicle generates?
Sample size: n= 739 [Indonesia]; 858 [Malaysia]; 834 [Philippines]; 769 [Singapore]; 920 [Thailand]; 865 [Vietnam]

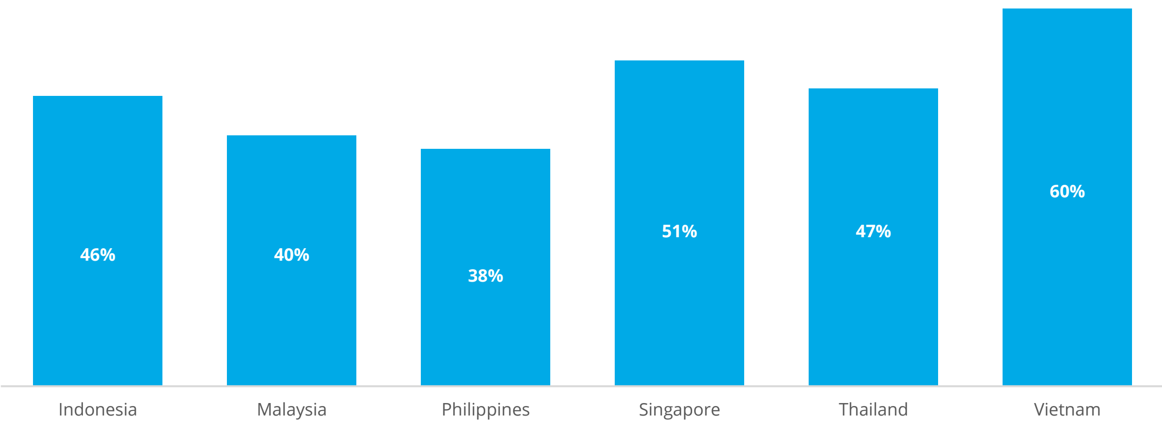
4. Vehicle subscriptions

Vehicle subscriptions

Interest in vehicle subscription

Against the backdrop of uncertain economic conditions causing concern for financial capacity, a significant number of younger consumers in many markets are at least somewhat interested in giving up vehicle ownership altogether in favour of a subscription model.

Interest in giving up vehicle ownership in favor of vehicle subscription for **18-34 year old respondents**



Q63: To what extent are you interested in giving up vehicle ownership in favour of subscribing to the use of a vehicle going forward?
Sample size: n= 379 [Indonesia]; 378 [Malaysia]; 445 [Philippines]; 268 [Singapore]; 276 [Thailand]; 350 [Vietnam]

Preferred characteristics of vehicle subscription

For those consumers interested in vehicle subscription services, convenience, availability of vehicles, and a predictable cost structure are the most important characteristics.

Important characteristics of a vehicle subscription

Characteristics of vehicle subscription	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Convenience	**58%**	39%	**57%**	**43%**	**44%**	**51%**
Increased flexibility	37%	41%	39%	40%	36%	43%
Possibility to exchange vehicles	28%	30%	29%	20%	26%	40%
Possibility to subscribe to a vehicle segment instead of a specific model	33%	35%	26%	24%	26%	29%
Possibility to subscribe to a specific model instead of a vehicle segment	22%	28%	28%	18%	30%	24%
Availability of vehicles	49%	40%	56%	37%	37%	45%
Home delivery services	47%	37%	38%	29%	37%	34%
Hassle-free online contract closing/ full digital customer experience	29%	31%	45%	32%	25%	39%
Full cost control due to transparent and predictable fixed monthly fees	45%	**49%**	50%	**43%**	36%.	47%
Availability of complementary premium services	30%	33%	36%	21%	31%	33%
Premium vehicles/brands offered	26%	31%	29%	14%	24%	32%
Selection of only brand new vehicles	20%	28%	22%	15%	24%	22%
Selection of brand new as well as certified pre-owned vehicles	27%	36%	40%	24%	35%	31%
Possibility to test new vehicles for a certain period without additional costs	37%	35%	41%	24%	33%	36%

Top three characteristics

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q64: What are the most important characteristics of a vehicle subscription? Please select all that apply.
Sample size: n= 418 [Indonesia]; 333 [Malaysia]; 338 [Philippines]; 420 [Singapore]; 422 [Thailand]; 555 [Vietnam]

Concerns regarding vehicle subscription services

At the same time, some consumers surveyed are concerned about vehicle availability, total ownership cost, and the perception of higher monthly fees associated with subscription services.

Main concerns regarding vehicle subscription services

Concerns regarding vehicle subscription services	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Losing the sense of ownership	30%	27%	36%	25%	30%	37%
Limited possibility for configuration	28%	28%	31%	18%	26%	30%
Total cost of ownership (i.e., price)	41%	44%	43%	45%	37%	39%
Vehicle availability/waiting time	**51%**	**50%**	**53%**	**46%**	41%	25%
Receiving and/or returning the vehicle	24%	34%	33%	31%	29%	31%
Lack of contact with the dealer (i.e., for maintenance, repair)	26%	34%	37%	24%	32%	22%
Difficulty ordering vehicle via an online channel	34%	30%.	32%	27%	30%	28%
Distrust for subscription service provider	34%	29%	30%	24%	36%	26%
Higher monthly fees compared to leasing	50%	45%	45%	44%	**44%**	**45%**
Other	1%	1%	1%	3%	1%	0%

Top three concerns

Note: Sum of the percentages exceed 100% as respondents can select multiple options.
Q65: What are your main concerns regarding vehicle subscription services? Please select all that apply.
Sample size: n= 1,005 [Indonesia]; 957 [Malaysia]; 1,000 [Philippines]; 1,000 [Singapore]; 1,000 [Thailand]; 977 [Vietnam]

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