2025 Global Automotive Consumer Study

Southeast Asia perspectives

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For over a decade, Deloitte has been exploring key consumer trends impacting a rapidly evolving global mobility ecosystem. The Global Automotive Consumer Study helps to inform Deloitte's point of view on the evolution of mobility, smart cities, connectivity sustainability, and other issues surrounding the movement of people and goods.

As many industry executives have echoed through the years, the automotive sector starts and ends with the consumer. As such, we have expanded the reach of our study to capture the opinions and behaviours of over 30,000 consumers in 30 geographies around the world.

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 (SEA) region, **6,029** survey respondents across six geographies were covered in the study.

This report presents key insights in four sections, overing electric vehicle adoption, future buying intentions, connectivity, and shared mobility.

Indonesia
(n= 1,004)

Malaysia
(n= 1,007)

Philippines
(n= 1,009)

Singapore
(n= 1,007)

Thailand
(n= 1,017)

Vietnam
(n= 985)

All-battery electric vehicle (BEV) inertia remains muted in most markets as interest in internal combustion engine (ICE) and hybrid vehicles tick up

Consumer interest in full hybrids and range extender technology (i.e., no external charging plug) is gaining momentum in SEA markets as consumers seek a "best of both worlds" solution to reduce fuel costs and lower emissions without the need for charging infrastructure.

Intended vehicle brand defection remains high in SEA markets

At least two-thirds of surveyed consumers intend to switch brands the next time they are in-market for a vehicle, signalling the need to build strong customer relationships, particularly in Vietnam that has a significant percentage of first-time buyers.

Autonomous vehicles are coming back into view, but consumer concerns remain

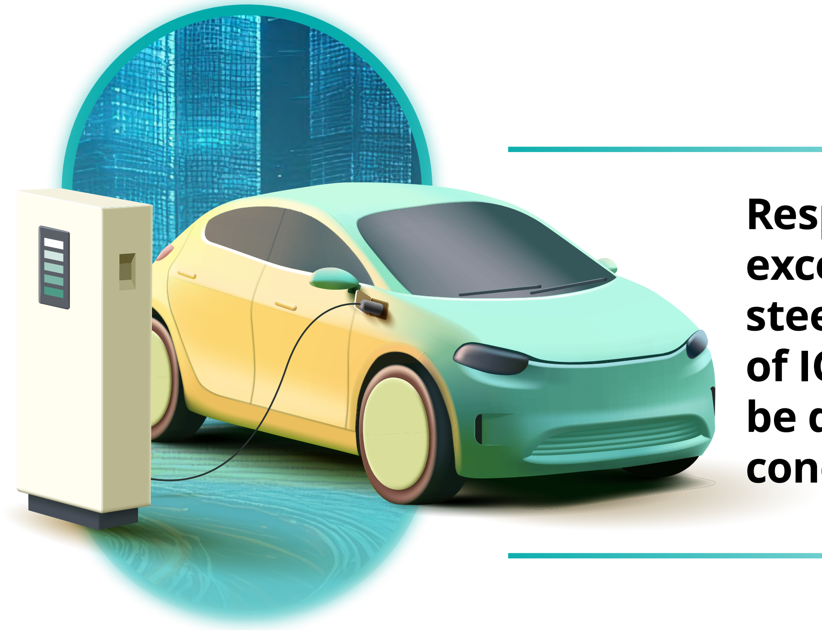
An evolving view of the regulatory environment governing the development of autonomous technology in some global markets may ease the deployment of self-driving vehicle fleets for both consumer and commercial applications. The integration of artificial intelligence (AI) into vehicle systems to enable self-driving features is also seen as largely beneficial, particularly in Indonesia, Thailand, and Vietnam markets.

A relatively high frequency of vehicle use persists in many markets, but many younger consumers surveyed are interested in mobility as a service (MaaS) over ownership

More than half of surveyed consumers in Indonesia, Malaysia, and Vietnam say they drive their vehicle everyday, which is twice the number of consumers in Singapore. However, a significant number of 18-34-year-olds surveyed in those markets (among others) are at least somewhat interested in giving up traditional vehicle ownership in favour of a MaaS solution.

01

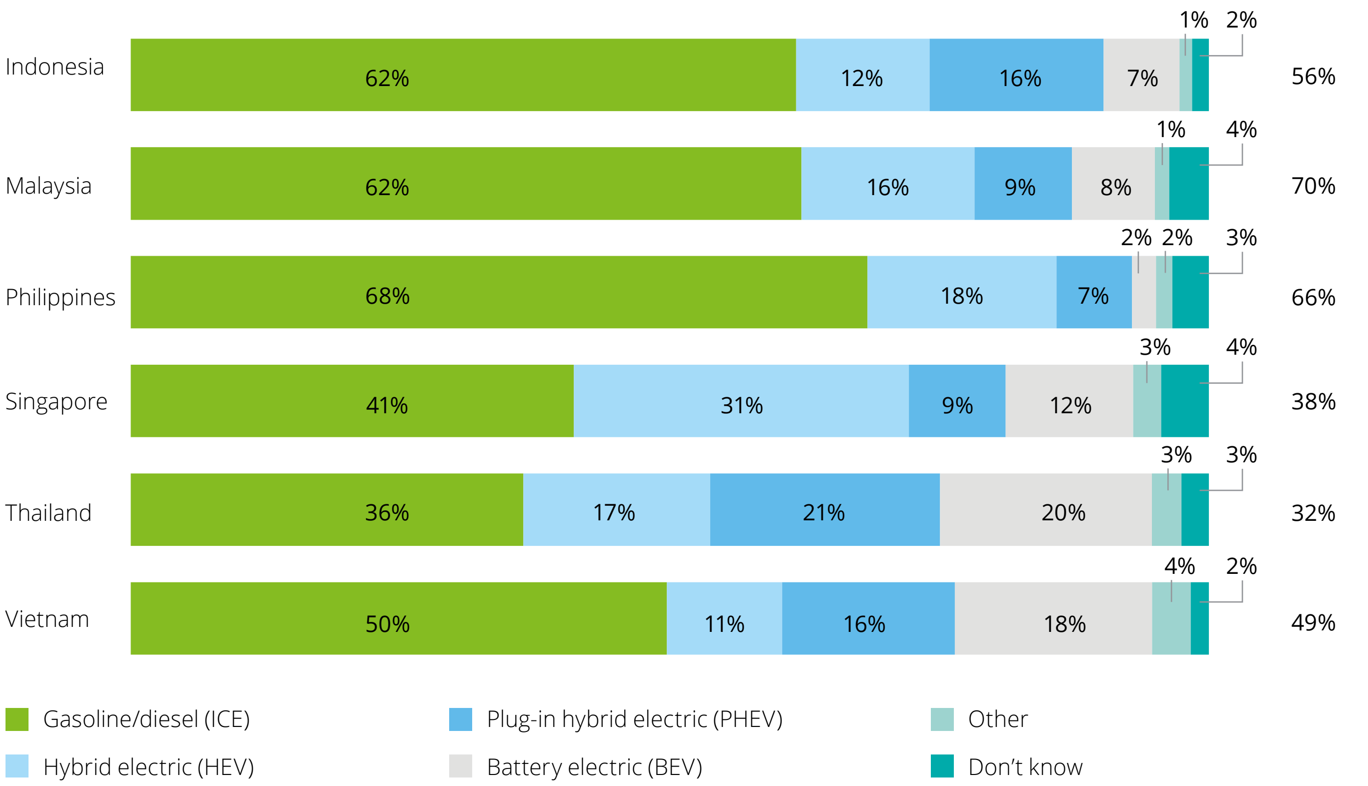
Vehicle electrification



Respondents across SEA markets, except for Malaysia, continue to steer away from all BEVs in favour of ICE and hybrids which could be due, in part, to affordability concerns.

Preference for type of engine in next vehicle

ICE (2024)



Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; percentages may not add up to 100 due to rounding.

Q41. What type of engine would you prefer in your next vehicle?

Sample size: n= 768 [Indonesia]; 856 [Philippines]; 769 [Singapore]; 897 [Malaysia]; 906 [Thailand]; 832 [Vietnam]

Some reasons surveyed consumers intend to acquire an electrified vehicle include a desire to lower fuel costs, concern for the environment, and the driving experience (e.g., quieter, better performance).

Top reasons to choose an EV as next vehicle

Factors	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Concern for the environment	58%	53%	66%	43%	53%	62%
Concern about personal health	48%	29%	41%	24%	36%	62%
Lower fuel costs	61%	65%	70%	62%	60%	71%
Less maintenance	41%	47%	42%	47%	40%	35%
Ability to use the vehicle as a backup battery / power source	46%	38%	55%	27%	43%	38%
Peer pressure	7%	5%	7%	5%	5%	22%
Driving experience	57%	56%	57%	44%	44%	58%
Government incentives / subsidies / stimulus programs	36%	46%	23%	48%	38%	36%
Potential for extra taxes/ levies applied to ICE vehicles	35%	27%	19%	28%	26%	21%
Potential ban on sale of new ICE vehicles	27%	12%	15%	18%	18%	19%

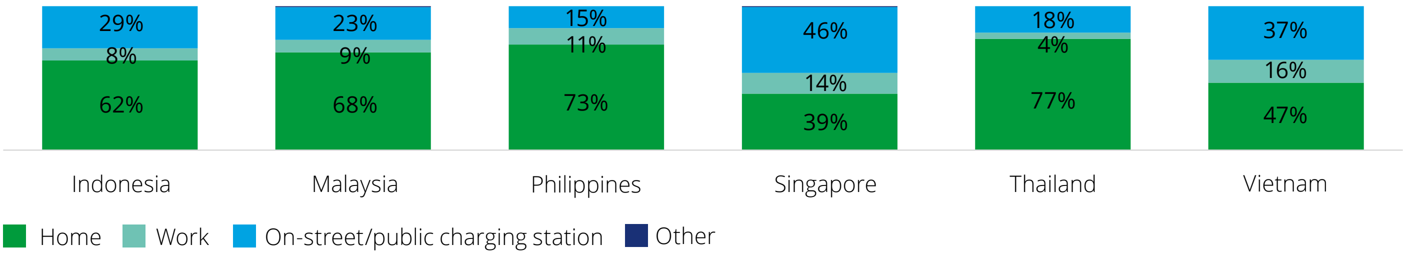
Top reasons

Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? Please select all that apply.

Sample size: n = 273 [Indonesia]; 294 [Malaysia]; 229 [Philippines]; 399 [Singapore]; 528 [Thailand]; 374 [Vietnam]

The push to create public charging capacity may be somewhat overstated in many markets as a strong majority of EV intenders surveyed plan to charge their vehicle at home.

Expecting to charge electrified vehicle most often at...



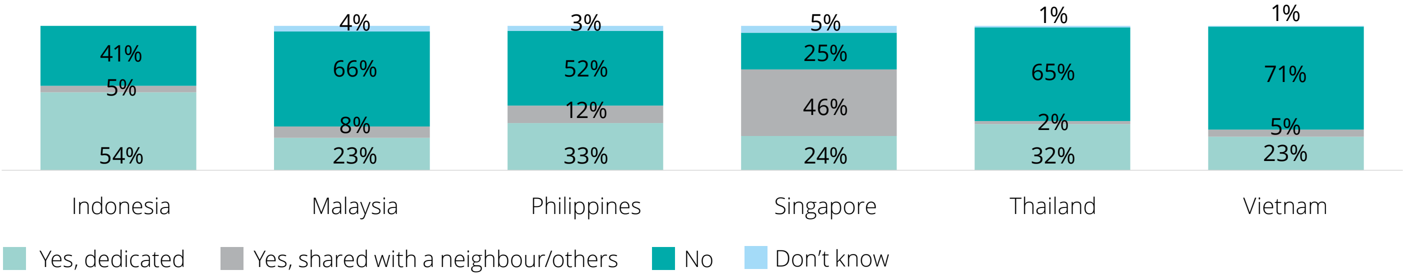
Note: Percentages may not add up to 100 due to rounding.

Q43: Where do you expect to charge your EV most often?

Sample size: n= 178 [Indonesia]; 150 [Malaysia]; 79 [Philippines]; 160 [Singapore]; 371 [Thailand]; 285 [Vietnam]

However, many EV intenders surveyed in SEA markets who plan to charge at home do not currently have access to a charger. In Singapore, a majority of EV intenders plan to charge using a shared charger.

EV charger access among consumers who plan to charge their vehicle at home



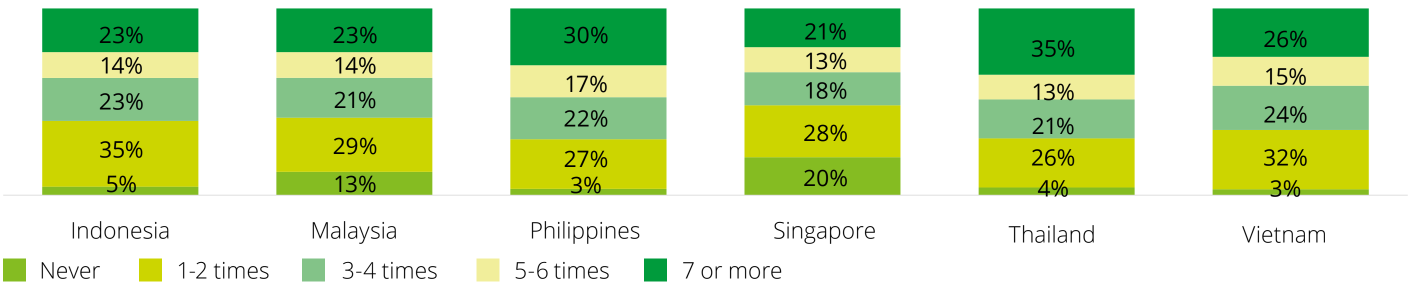
Note: Percentages may not add up to 100 due to rounding.

Q44: Do you already have access to a charger at your residence?

Sample size: n= 111 [Indonesia]; 102 [Malaysia];58 [Philippines]; 63 [Singapore]; 287 [Thailand]; 134 [Vietnam]

The need for public EV charging investment may also be more concentrated in Philippines, Thailand, and Vietnam as survey respondents tend to drive farther than 100 km from their home more frequently than those in Malaysia and Singapore.

How often did consumers drive more than 100 km from their home last month?



Note: Percentages may not add up to 100 due to rounding.

Q18: How many times in the past month have you driven more than 60 miles or 100 kilometres from your home?

Sample size: n= 500 [Indonesia]; 829 [Malaysia]; 467 [Philippines]; 536 [Singapore]; 575 [Thailand]; 581 [Vietnam]

Consumers surveyed in most SEA markets would prefer to charge their EV at a dedicated charging facility, perhaps reflecting a perception that these locations may offer more access to chargers with up-to-date technology. Consumers in Singapore would most prefer to charge at a public parking place.

Preference for public EV charging location

Public places	ID	MY	PH	SG	TH	VN
Dedicated EV charging station	46%	44%	42%	24%	20%	37%
Traditional gas station with EV chargers	37%	19%	34%	15%	54%	24%
Vehicle dealership	5%	3%	5%	3%	3%	3%
Retail outlet/mall	3%	11%	6%	9%	12%	10%
Parking lot	5%	14%	6%	32%	5%	13%
On-street parking	1%	4%	1%	10%	2%	7%
Community/public building	2%	3%	3%	5%	3%	7%
Hotel	2%	2%	3%	2%	0%	0%

Most preferred location

Note: Percentages may not add up to 100 due to rounding.

Q48: Where would you most want to charge your EV when you are away from home?

Sample size: n= 178 [Indonesia]; 150 [Malaysia]; 79 [Philippines]; 160 [Singapore]; 371 [Thailand]; 285 [Vietnam]

Surveyed consumers across most SEA markets agreed that the most important aspect of an EV charging experience is a fast charging time, eclipsing other factors including accessibility, amenities, security, and even the number of available/functional plugs. Whereas, consumers in Philippines want accessibility and fast charging time.

Most important aspect of an EV charging experience

Aspects of the EV charging experience	ID	MY	PH	SG	TH	VN
Availability of amenities (e.g., restrooms, WiFi connectivity, lounge/siting area)	6%	3%	9%	8%	10%	8%
Accessibility of the charging station	9%	17%	29%	15%	13%	16%
Fast charging time	36%	47%	27%	34%	22%	35%
Personal security (e.g., cameras, well-lit location, emergency assistance)	8%	8%	6%	6%	15%	5%
Number of available/functional chargers	8%	6%	6%	9%	11%	8%
Having a standard plug (no adapter needed)	2%	5%	8%	3%	7%	6%
Ease of use	7%	5%	3%	8%	6%	6%
Easy payment options	3%	1%	4%	3%	3%	3%
Location is easy to find/access	20%	9%	9%	15%	15%	13%

Most important

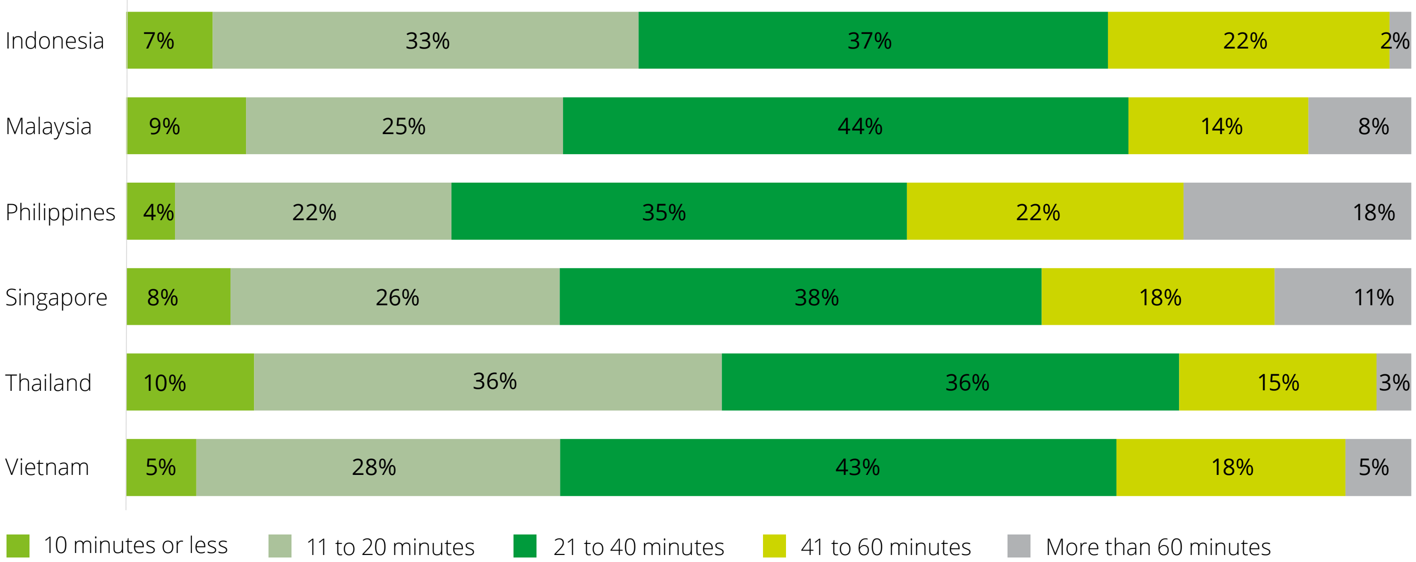
Note: Percentages may not add up to 100 due to rounding.

Q50: What is the most important aspect of an EV charging experience?

Sample size: n= 178 [Indonesia]; 150 [Malaysia]; 79 [Philippines]; 160 [Singapore]; 371 [Thailand]; 285 [Vietnam]

However, a long-standing industry assumption that EV charge times need to be on par with fossil fuel fill-ups may be overstated as surveyed consumers in most markets are willing to wait up to 40 minutes.

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



Note: Percentages may not add up to 100 due to rounding.

Q49: How long do you think it should take to charge an EV from fully discharged to 80% at a public charging location?

Sample size: n= 178 [Indonesia]; 150 [Malaysia]; 79 [Philippines]; 160 [Singapore]; 371 [Thailand]; 285 [Vietnam]

When it comes to paying for public EV charging, surveyed consumers in SEA markets prefer the familiarity and convenience of using their charging apps on their smartphones or credit/debit cards.

Most preferred way to pay for public EV charging

Payment methods	ID	MY	PH	SG	TH	VN
Charging network app on your smartphone	53%	34%	34%	31%	49%	61%
Credit/debit card	15%	42%	29%	51%	21%	16%
Pre-paid subscription plan	21%	6%	15%	9%	12%	15%
Loyalty points	3%	8%	8%	7%	3%	4%
Third-party payment platform	8%	10%	9%	2%	14%	5%
Other	1%	0%	5%	0%	1%	0%

Most preferred mode of payment

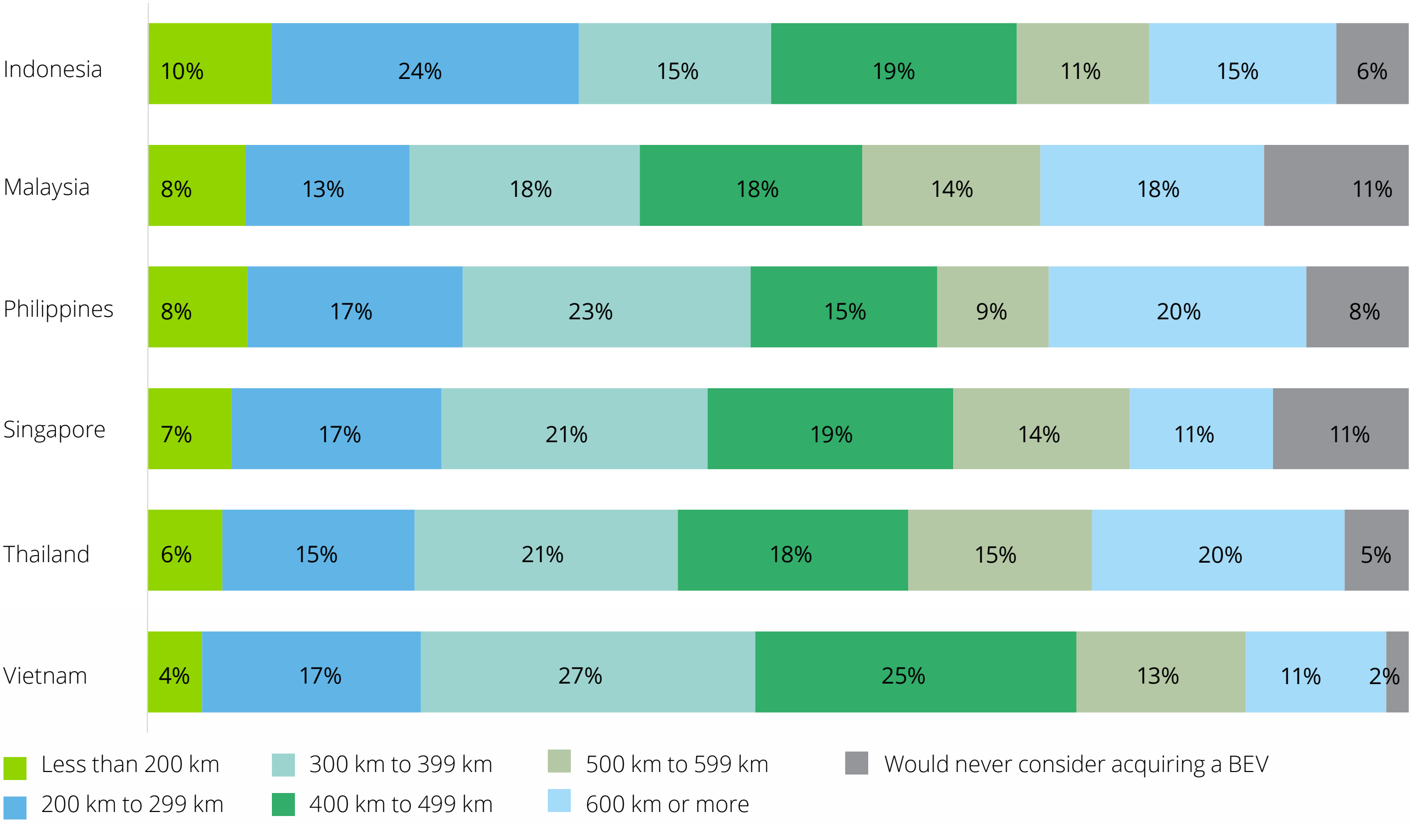
Note: Percentages may not add up to 100 due to rounding.

Q51: How would you most prefer to pay for public EV charging?

Sample size: n= 178 [Indonesia]; 150 [Malaysia]; 79 [Philippines]; 160 [Singapore]; 371 [Thailand]; 285 [Vietnam]

Across SEA markets, at least 4 in 10 consumers expect a BEV driving range of 400 km or more in order to consider acquiring one. 1 in 10 consumers in Malaysia and Singapore would never buy a BEV irrespective of driving range.

Consumer expectations on BEV driving range (in kilometres)



Note: Percentages may not add up to 100 due to rounding.

Q53: How far would a fully charged all-battery EV need to go in order for you to consider acquiring one?

Sample size: n= 714 [Indonesia]; 828 [Malaysia]; 837 [Philippines]; 678 [Singapore]; 728 [Thailand]; 679 [Vietnam]

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

Greatest concern regarding all BEVs

Concern	ID	MY	PH	SG	TH	VN
Driving range	42%	44%	42%	33%	46%	46%
Cost/price premium	18%	49%	35%	38%	50%	28%
Cold weather performance (e.g., limited range, longer charging time)	34%	20%	26%	15%	30%	28%
Increased need to plan my trips	16%	25%	20%	23%	27%	22%
Uncertain resale value	31%	28%	17%	22%	21%	23%
Potential for extra taxes/levies associated with BEVs	16%	23%	19%	19%	18%	19%
Time required to charge	42%	54%	43%	47%	45%	45%
Ongoing charging and running costs	25%	38%	29%	29%	41%	32%
Cost to eventually replace the battery	38%	47%	38%	38%	44%	20%
Lack of knowledge or understanding about EVs/EV technology	33%	34%	28%	23%	31%	43%
Lack of public EV charging infrastructure	49%	54%	43%	44%	26%	30%
Lack of charger at home	30%	42%	33%	31%	23%	27%
Lack of alternate power source (e.g., solar) at home	17%	31%	32%	21%	19%	38%
Safety concerns with battery technology	35%	42%	44%	40%	35%	28%
End-to-end sustainability (i.e., battery manufacturing/ recycling)	18%	25%	30%	21%	29%	10%
Lack of choice regarding brands/models	10%	17%	16%	13%	17%	3%

Most commonly cited

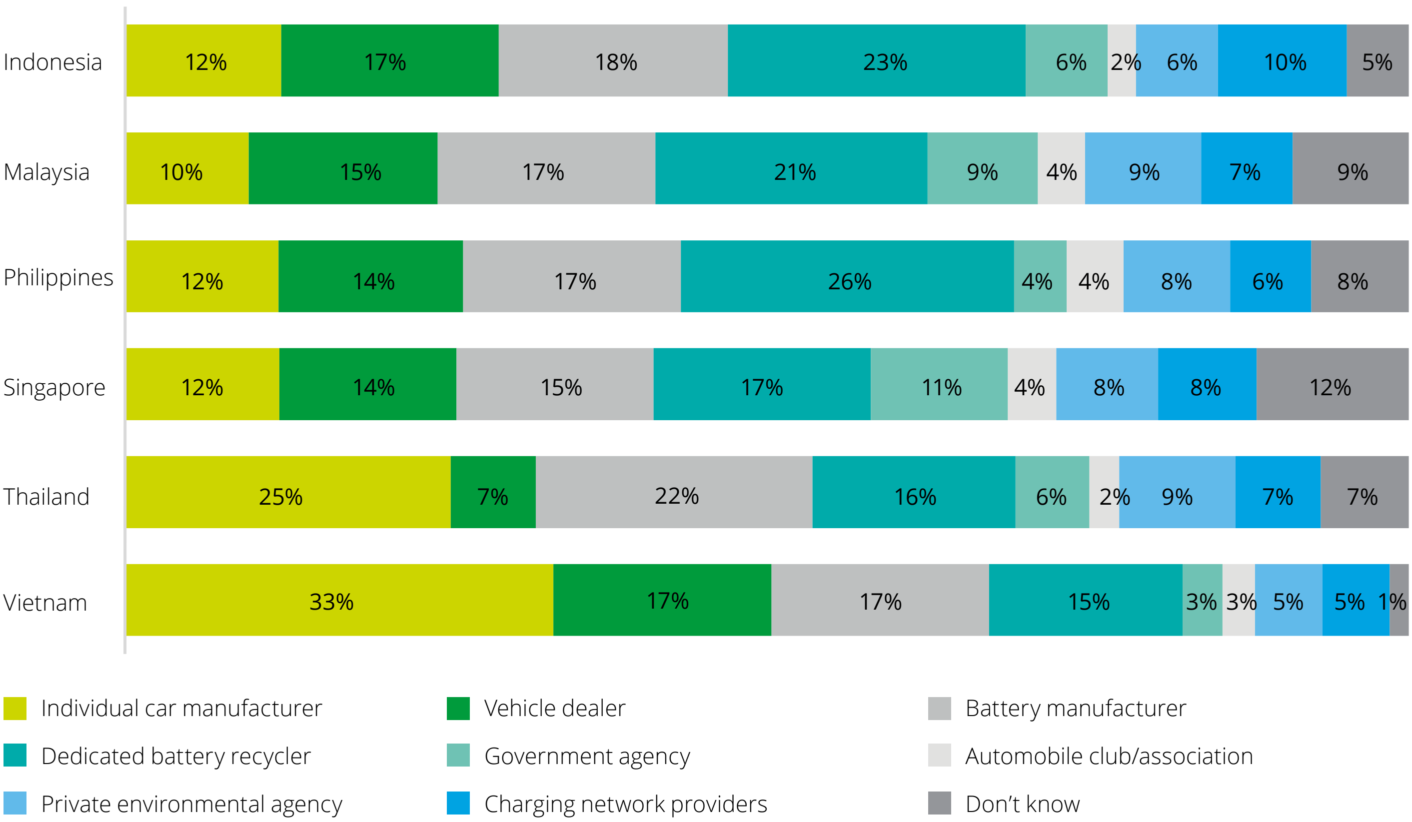
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q52: What are your biggest concerns regarding all battery-powered EVs? Please select all that apply.

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

The global end-of-life EV battery value chain remains relatively nascent even as the number of EVs on the road continues to increase[1] and surveyed consumers in the SEA region are split in terms of who they think should be responsible for battery stewardship.

Consumer preference for entity responsible for collecting, storing, and recycling EV batteries after their useful lives



[1]IEA, Global EV Outlook 2024.

Note: Percentages may not add up to 100 due to rounding.

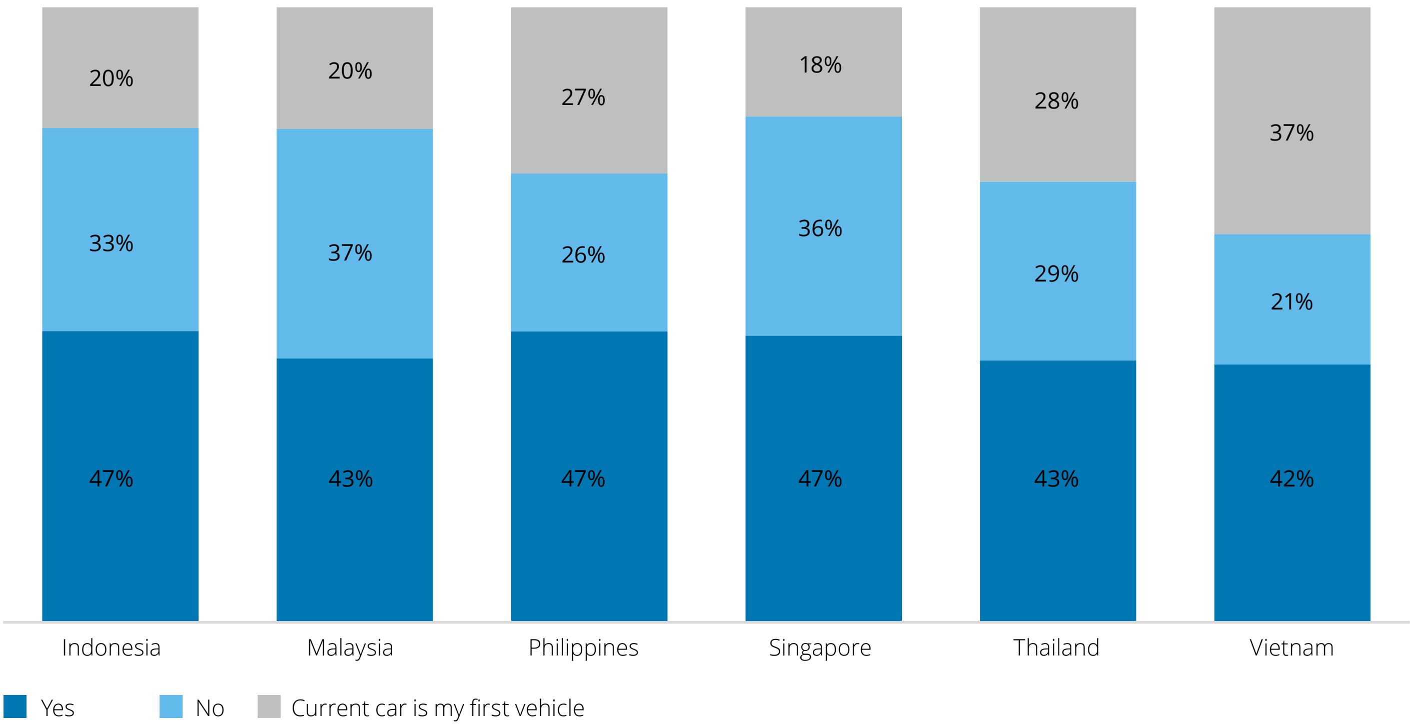
Q55: Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 831 [Vietnam]

02 Future vehicle intentions

4 out of 10 surveyed consumers in all SEA markets owned the same brand of vehicle prior to their current car, but more than a third of survey respondents in Vietnam say they are first time owners, signalling a need to build strong customer relationships to help ensure forward brand loyalty.

Percentage of consumers whose prior vehicle was from the same brand as current vehicle

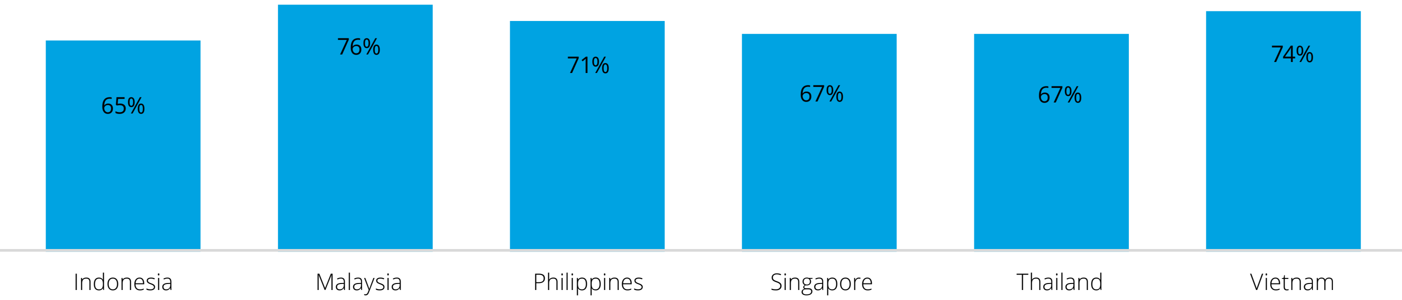


Q6. Was your prior vehicle from the same brand?

Sample size: n= 500 [Indonesia]; 829 [Malaysia]; 467 [Philippines]; 536 [Singapore]; 575 [Thailand]; 581 [Vietnam]

At least two-thirds of surveyed consumers in all SEA markets say they intend to switch to another brand of vehicle the next time they are in-market, signalling the intensity of the competitive landscape across the region.

Percentage of consumers intending to switch 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?; Q26. 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= 481 [Indonesia]; 752 [Malaysia]; 444 [Philippines]; 497 [Singapore]; 550 [Thailand]; 608 [Vietnam]

Depending on the market, what matters most to surveyed consumers thinking about their next vehicle brand is either price, product quality, features, or performance.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	ID	MY	PH	SG	TH	VN
Previous sales experience	22%	10%	10%	10%	21%	12%
Previous service experience	24%	17%	17%	16%	23%	20%
Product quality	68%	66%	70%	58%	62%	67%
Brand advertising	13%	11%	11%	9%	15%	17%
Brand image	41%	30%	38%	28%	36%	41%
Brand affiliations (e.g., sponsorships, partners)	11%	9%	10%	7%	10%	16%
Brand familiarity	32%	31%	37%	31%	33%	29%
Quality of overall ownership experience	44%	40%	40%	33%	28%	43%
Vehicle features	48%	55%	55%	46%	59%	52%
Availability of BEVs /hybrid options	21%	21%	24%	25%	33%	26%
Vehicle performance (e.g., fuel efficiency, battery range)	63%	68%	71%	62%	42%	51%
Price	54%	61%	54%	59%	47%	49%

Most commonly cited

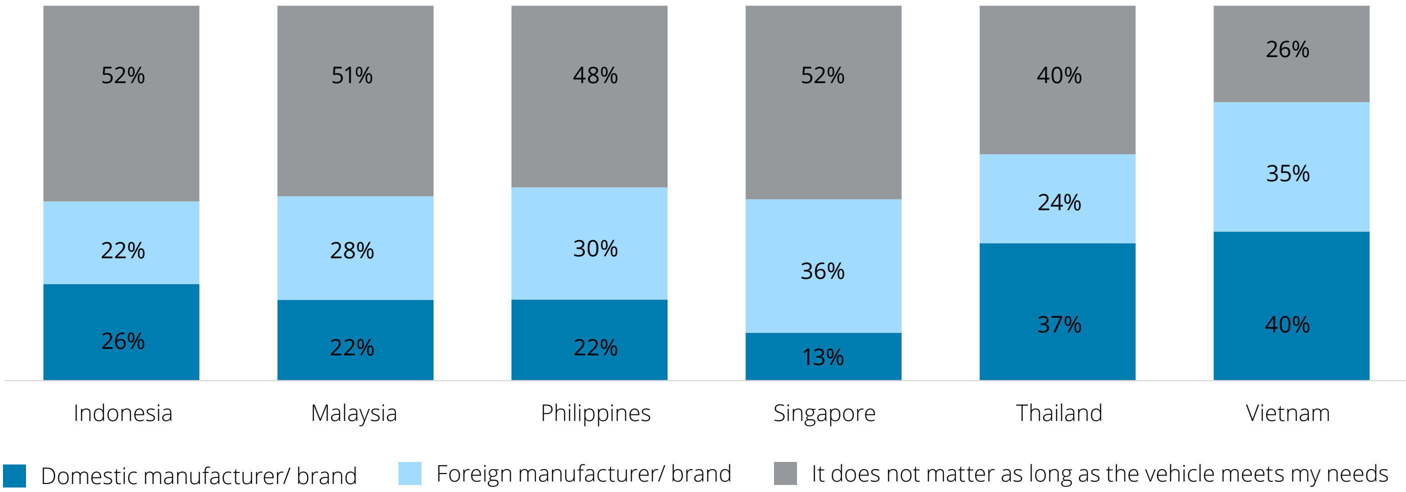
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

Brand affinity for domestic automakers is strongest among consumers in Thailand and Vietnam. While in the other markets, about half of the consumers place less importance on whether a vehicle is from a domestic or foreign manufacturer/brand.

Preferred organisations for next vehicle purchase



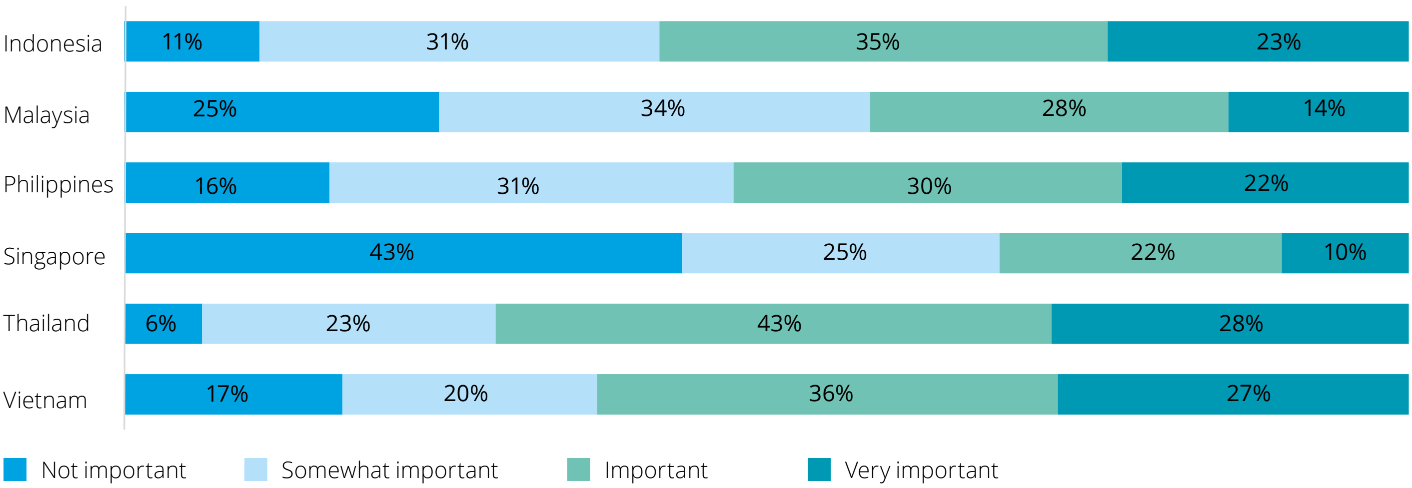
Note: percentages may not add to 100 due to rounding.

Q54: From which of the following type of organisations are you most interested in acquiring your next vehicle?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

As global trade policies shift, encouraging a more regional approach to vehicle manufacturing footprints and supply chains, consumer sentiment differs among respondents when it comes to whether local manufacturing is an important criterion for choosing a vehicle.

Importance of next vehicle to be manufactured locally



Note: Percentages may not add up to 100 due to rounding.

Q31: To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your country or region)?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

As some original equipment manufacturers (OEMs) continue to explore the potential for ‘agency’ retail models, surveyed consumers in Vietnam are more receptive to the concept of buying a vehicle directly from the manufacturer compared to consumers in Malaysia.

Percentage of surveyed consumers who would be interested in acquiring **vehicle directly from the manufacturer**

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

Q61: To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)? Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

However, it may be difficult to move to an entirely online purchase process in many markets as surveyed consumers say they need to physically interact with the vehicle before they buy it. Thailand may be of interest to explore online retail models given three quarters of consumers prefer to limit dealership visits.

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

Aspect of vehicle purchase experience	ID	MY	PH	SG	TH	VN
I want to interact with real people	88%	87%	89%	87%	89%	89%
I want to negotiate in-person to get the best deal	91%	89%	90%	87%	88%	90%
I need to physically interact with the vehicle before I buy it	90%	92%	91%	91%	93%	89%
I have to test drive the vehicle to make sure it's right for me	89%	90%	90%	90%	90%	90%
I prefer to limit the need to visit a dealership in person	43%	55%	54%	55%	73%	44%
I want to build a relationship with a dealer for future service	82%	73%	85%	74%	83%	83%

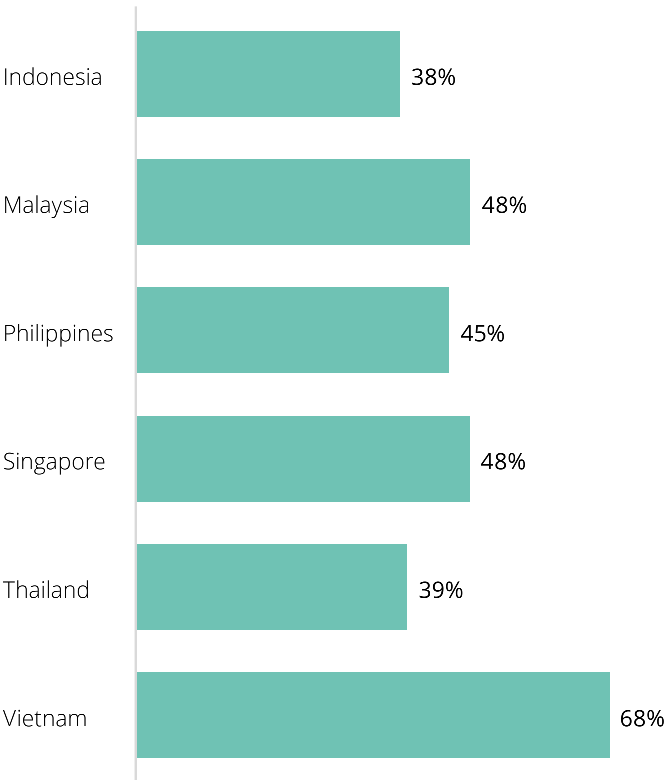
Q40: Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 831 [Vietnam]

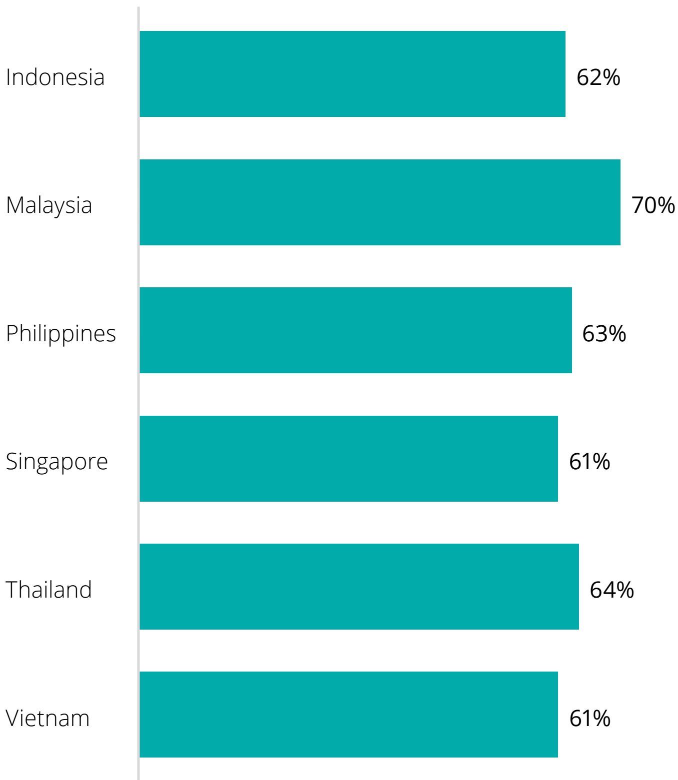
03 Connectivity

Consumers surveyed in all SEA markets are relatively more concerned about commercial vehicles operating in fully autonomous mode on highways than self-driving robotaxis operating in areas where they live.

Percentage of consumers concerned about **fully autonomous robotaxi services** operating where they live



Percentage of consumers concerned about **commercial vehicles operating in a fully autonomous mode** on the highway

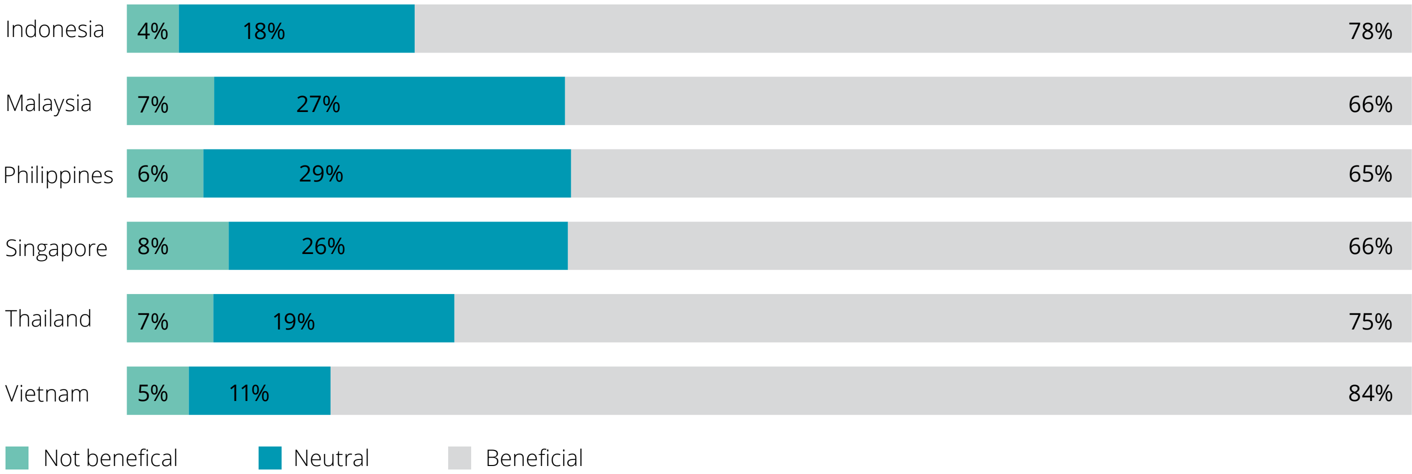


Q56. To what extent are you concerned with each of the following scenarios?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

At least two-thirds of surveyed consumers across SEA markets believe the addition of artificial intelligence in vehicle systems is beneficial. The percentage of such consumers is particularly high in Indonesia, Thailand, and Vietnam.

Addition of artificial intelligence in vehicle systems



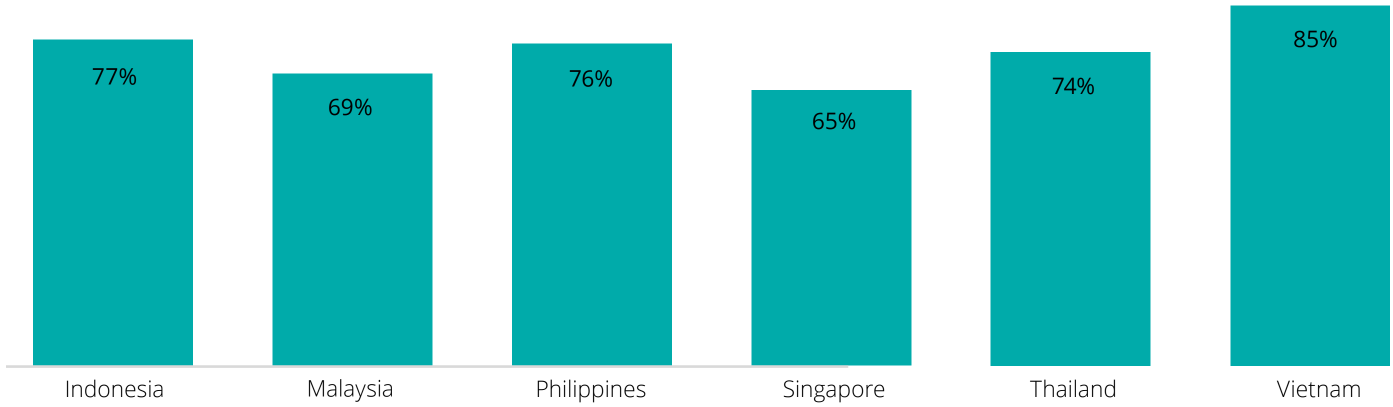
Note: Percentages may not add up to 100 due to rounding.

Q62: To what extent do you think the addition of artificial intelligence in vehicle systems (e.g., voice activated features, autonomous driving) will be beneficial?

Sample size: n= n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

At a time when some car manufacturers are attempting to introduce their own connected service ecosystems, surveyed consumers in SEA markets still believe their next vehicle should retain the ability to connect with their smartphone.

Importance of vehicle connectivity with smartphone (% somewhat/very important)



Q58. How important will it be for your next vehicle to connect with your smartphone via Apple CarPlay or Android Auto?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

A significant number of surveyed consumers across SEA markets interested in connected vehicle features are willing to pay extra, particularly for anti-theft tracking services.

Willingness (willing/very willing) to pay extra for connected vehicle services

Connected vehicle services	ID	MY	PH	SG	TH	VN
Automatic detection of vehicles and pedestrians	71%	68%	78%	62%	74%	85%
Emergency assistance (e.g., collision detection)	83%	76%	86%	74%	84%	87%
Anti-theft tracking	85%	79%	86%	67%	87%	88%
Warranty/recall notices	70%	65%	76%	59%	70%	75%
App connectivity	72%	60%	73%	54%	72%	82%
Autonomous/remote parking	63%	56%	64%	51%	72%	77%
Infotainment functions (e.g., navigation, video streaming)	66%	56%	68%	52%	64%	75%
Vehicle health reporting and maintenance cost forecasts	77%	65%	77%	59%	77%	83%
Optimised vehicle insurance plan based on your driving habits	72%	60%	74%	57%	79%	81%
Digital key	72%	56%	66%	52%	67%	81%

Most commonly cited

Q57: To what extent would you be willing to pay extra for each of the following connected vehicle services?

Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

In most markets surveyed, consumers trust car manufacturers the most when it comes to managing connected vehicle data. Consumers in Singapore trust a government agency and car makers the most while those in Thailand trust their dealers.

Most trusted entity for managing vehicle data

Most trusted entity	ID	MY	PH	SG	TH	VN
Car manufacturer	34%	29%	34%	23%	16%	45%
Vehicle dealer	11%	16%	15%	12%	29%	15%
Financial service provider	3%	5%	6%	5%	4%	3%
Insurance company	13%	10%	13%	9%	15%	9%
Automobile club or association	4%	3%	5%	4%	3%	1%
Cellular service provider	8%	5%	5%	4%	7%	6%
Cloud service provider	9%	8%	7%	6%	7%	5%
Government agency	11%	9%	5%	23%	7%	13%
Other	0%	0%	0%	0%	0%	0%
None of the above	7%	17%	10%	14%	13%	4%

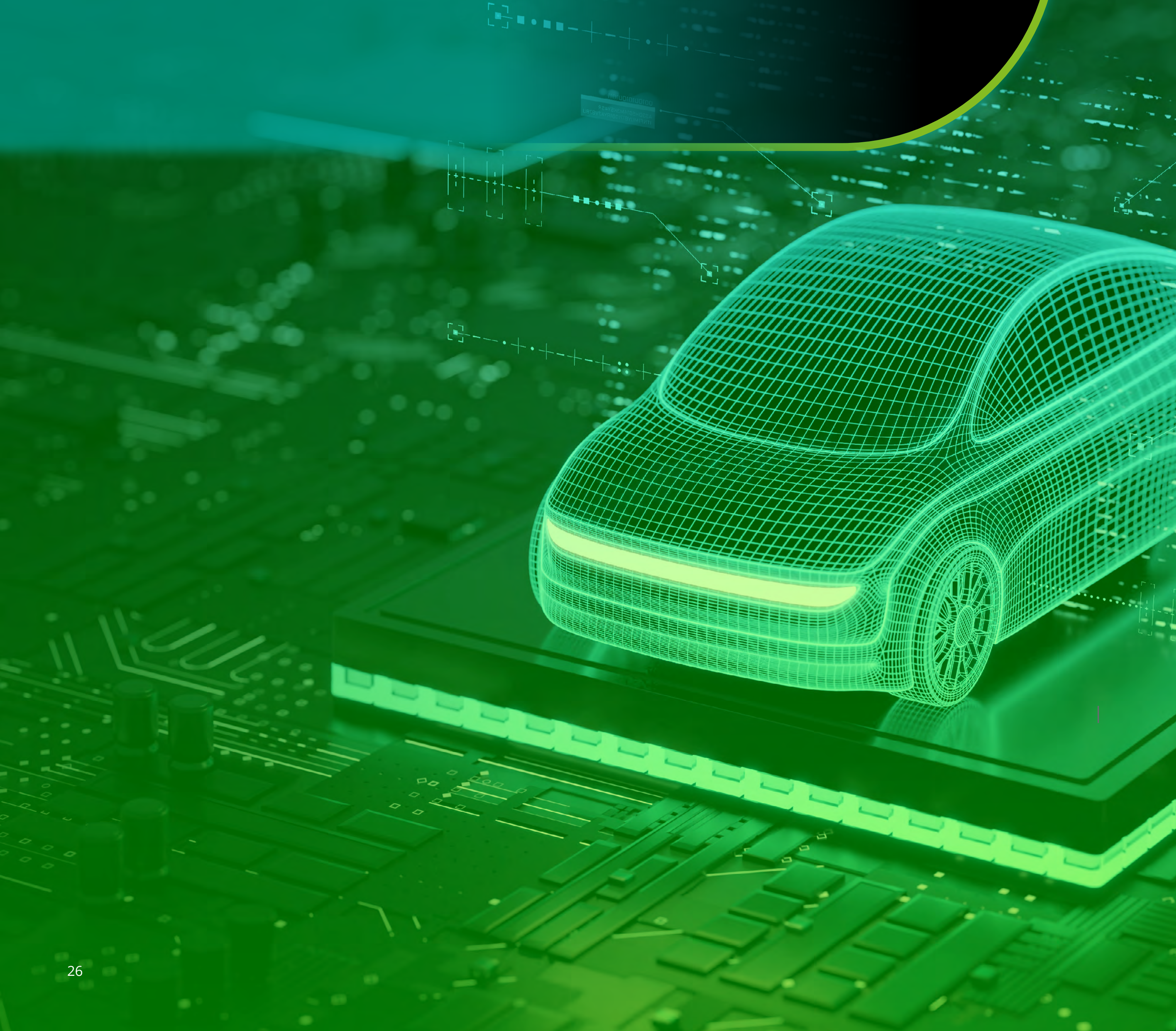
Most commonly cited

Note: Percentages may not add up to 100 due to rounding.

Q59. Who do you trust most to access and manage the data your vehicle generates?

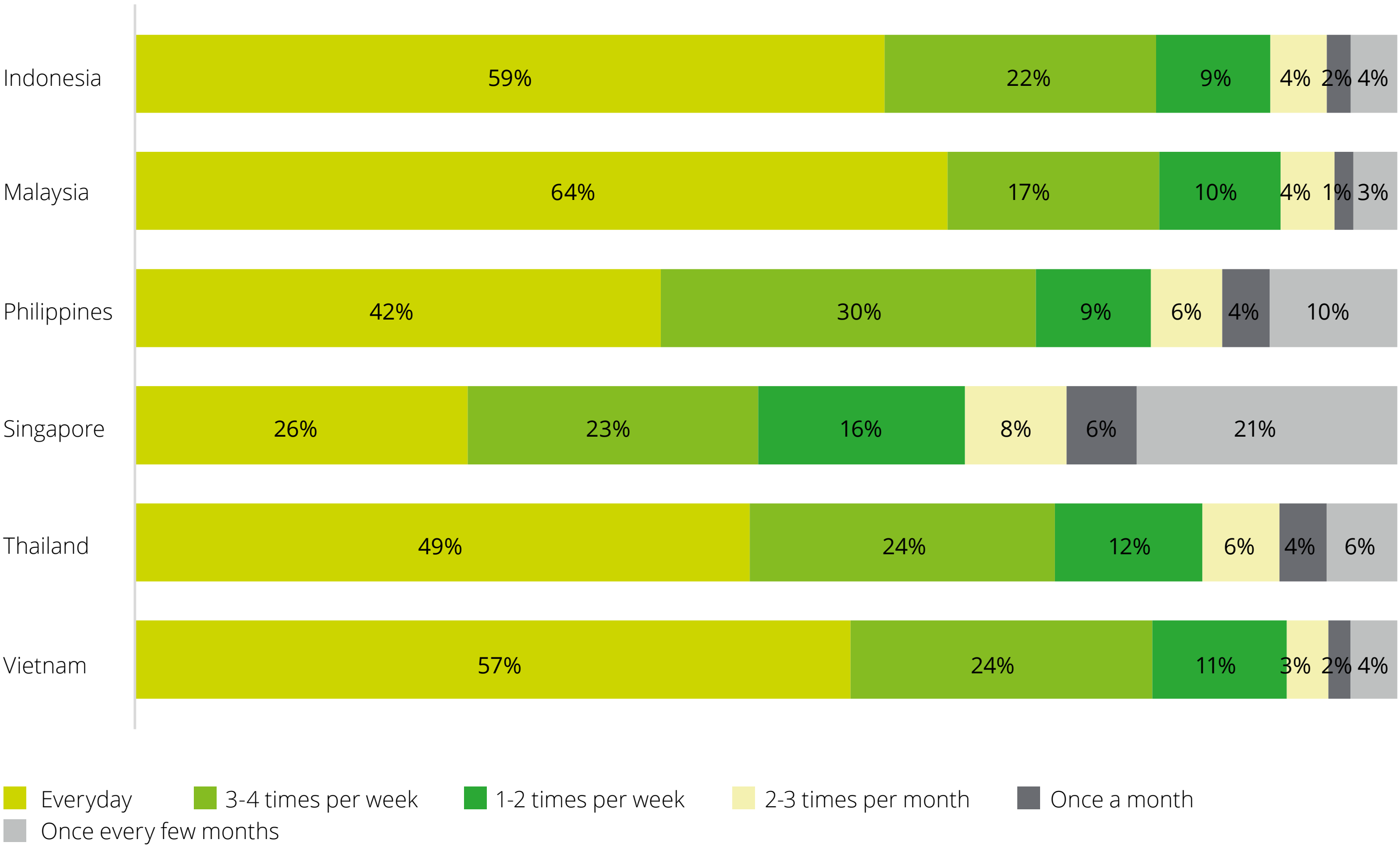
Sample size: n= 768 [Indonesia]; 897 [Malaysia]; 856 [Philippines]; 769 [Singapore]; 906 [Thailand]; 832 [Vietnam]

04 Mobility as a Service (MaaS)



More than half of surveyed consumers in Indonesia, Malaysia, and Vietnam say they drive their vehicle everyday – roughly twice the number of consumers in Singapore who say the same, perhaps reflecting a difference in the quality and/or availability of mass transit across markets.

Frequency of driving personal vehicle

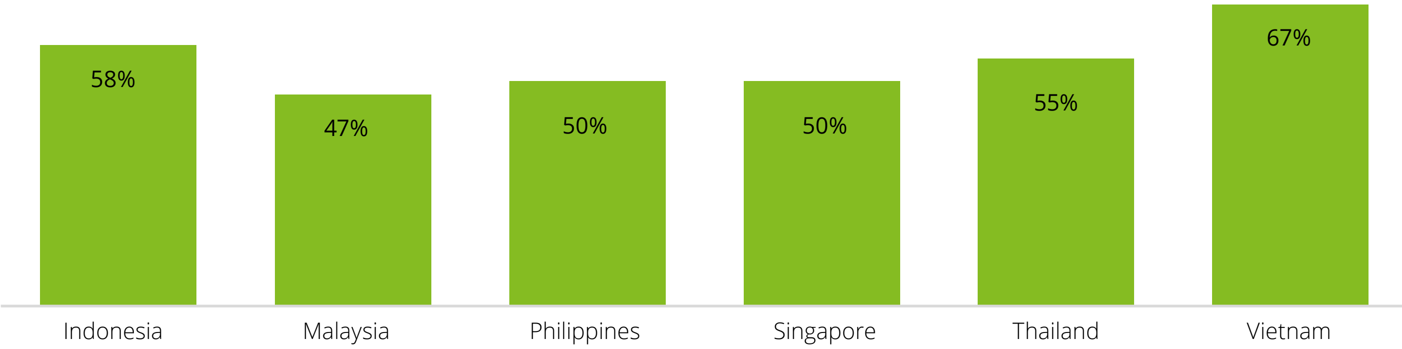


Q70: How often do you drive your current vehicle?

Sample size: n= 1,004 [Indonesia]; 1,007 [Malaysia]; 1,009 [Philippines]; 1,007 [Singapore]; 1,017 [Thailand]; 985 [Vietnam]

Two-thirds of younger consumers in Vietnam would be willing to give up vehicle ownership in favour of a MaaS solution. In contrast, less than half of younger consumers in Malaysia would be willing to do the same.

Willingness to give up vehicle ownership in favour of MaaS (% somewhat willing/willing/very willing) – 18- to 34-year-old respondents



Q63: To what extent would you be willing to give up vehicle ownership in favour of a fully available MaaS solution going forward?

Sample size: n= 374 [Indonesia]; 406 [Malaysia]; 455 [Philippines]; 268 [Singapore]; 283 [Thailand]; 330 [Vietnam]

Consumers surveyed across SEA markets currently rely more on their personal vehicles than MaaS solutions to satisfy their transportation requirements.

Percentage of mobility needs **currently addressed** by private vehicle vs. MaaS

Mix of transportation type	ID	MY	PH	SG	TH	VN
100% Private vehicle – 0% MaaS	22%	27%	17%	17%	35%	17%
90% Private vehicle – 10% MaaS	11%	12%	10%	8%	13%	19%
80% Private vehicle - 20% MaaS	14%	12%	14%	10%	17%	16%
70% Private vehicle - 30% MaaS	15%	10%	12%	11%	12%	15%
60% Private vehicle - 40% MaaS	9%	8%	10%	8%	5%	9%
50% Private vehicle - 50% MaaS	16%	16%	20%	17%	8%	11%
40% Private vehicle - 60% MaaS	4%	5%	4%	4%	2%	4%
30% Private vehicle - 70% MaaS	2%	3%	3%	3%	1%	3%
20% Private vehicle - 80% MaaS	2%	3%	2%	2%	2%	2%
10% Private vehicle - 90% MaaS	1%	1%	2%	3%	1%	2%
0% Private vehicle - 100% MaaS	4%	3%	5%	18%	5%	1%

Note: Percentages may not add up to 100 due to rounding.

Q64: Currently, what percentage of your overall mobility needs are being addressed by the following types of transportation?

Sample size: n= 1,004 [Indonesia]; 1,007 [Malaysia]; 1,009 [Philippines]; 1,007 [Singapore]; 1,017 [Thailand]; 985 [Vietnam]

However, the use of personal vehicles is expected to decline in favour of MaaS solutions within the next five years.

Consumer preference for percentage of mobility needs by type **in five years** (private vehicle vs. MaaS)

Mix of transportation type	ID	MY	PH	SG	TH	VN
100% Private vehicle – 0% MaaS	17%	17%	18%	11%	24%	13%
90% Private vehicle – 10% MaaS	11%	11%	12%	8%	10%	12%
80% Private vehicle - 20% MaaS	12%	12%	15%	11%	10%	12%
70% Private vehicle - 30% MaaS	12%	11%	10%	9%	11%	12%
60% Private vehicle - 40% MaaS	9%	8%	9%	8%	7%	11%
50% Private vehicle - 50% MaaS	20%	20%	17%	19%	16%	17%
40% Private vehicle - 60% MaaS	4%	5%	5%	5%	4%	7%
30% Private vehicle - 70% MaaS	6%	6%	4%	6%	4%	7%
20% Private vehicle - 80% MaaS	4%	4%	4%	5%	4%	5%
10% Private vehicle - 90% MaaS	2%	2%	2%	4%	3%	3%
0% Private vehicle - 100% MaaS	2%	3%	3%	14%	6%	2%

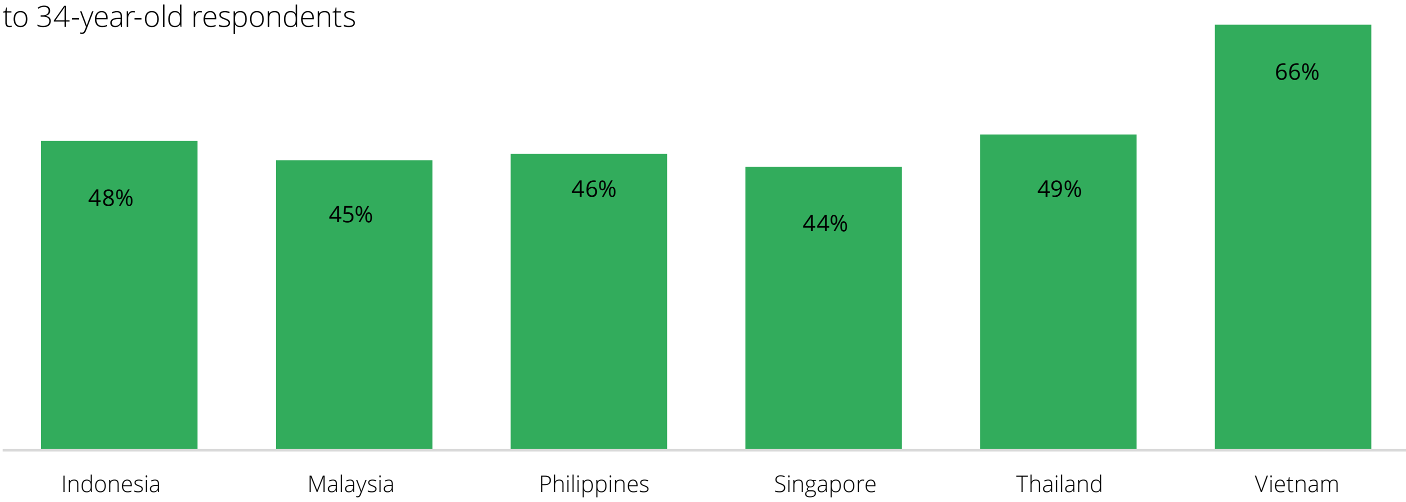
Note: Percentages may not add up to 100 due to rounding.

Q66: Ideally, what percentage of your overall mobility needs would you like to address with the following types of transportation in five years?

Sample size: n= 1,004 [Indonesia]; 1,007 [Malaysia]; 1,009 [Philippines]; 1,007 [Singapore]; 1,017 [Thailand]; 985 [Vietnam]

A significant number of younger consumers surveyed in SEA markets are showing interest in diversifying their vehicle ownership models to better suit their needs. This includes considering subscription models over traditional ownership, reflecting a backdrop of uncertain economic conditions causing concern for financial capacity.

Interested in giving up vehicle ownership in favour of vehicle subscription (% somewhat/very interested) – 18- to 34-year-old respondents



Q69: 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= 374 [Indonesia]; 406 [Malaysia]; 455 [Philippines]; 268 [Singapore]; 283 [Thailand]; 330 [Vietnam]

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