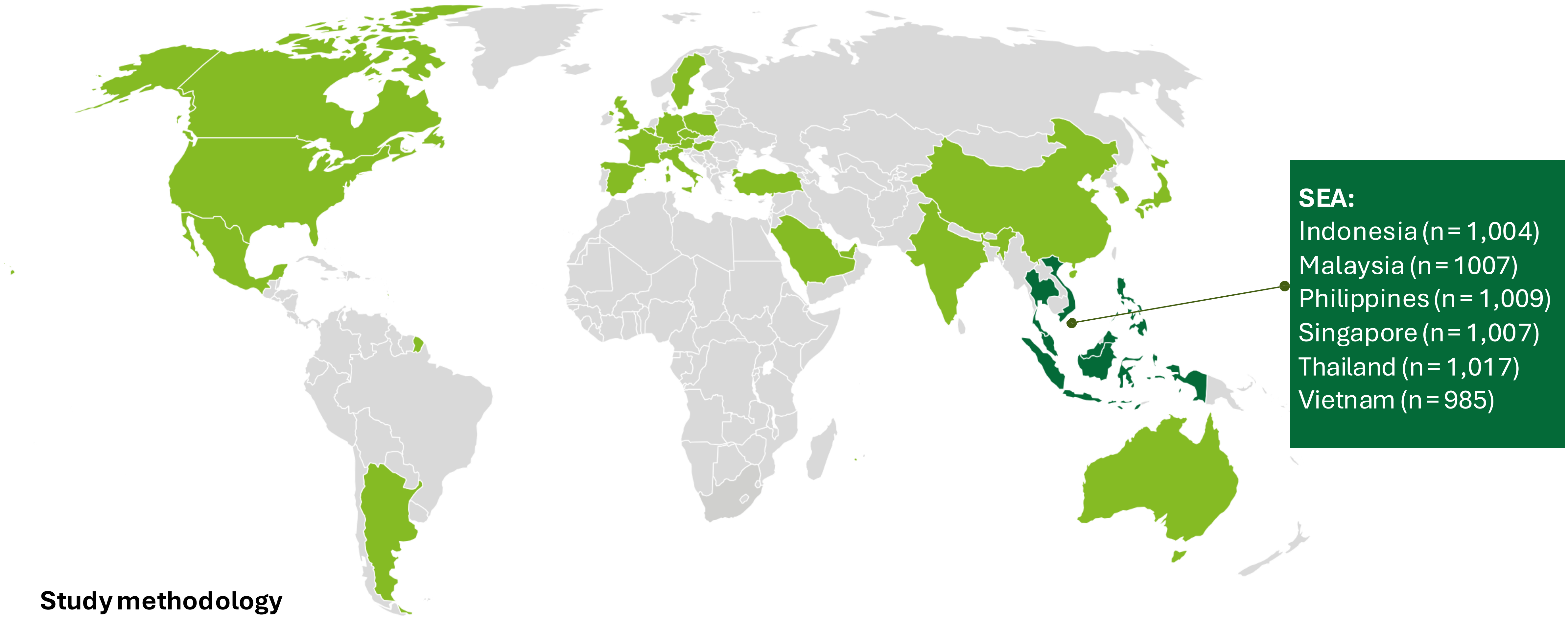
Deloitte.

2025 Global Automotive Consumer Study

Key Findings: Southeast Asia

Global Automotive Consumer Survey (GACS) 2025 coverage

The 2025 study includes over **31,000** consumer responses from **30** countries around the world, **~1,000** from each market in SEA.



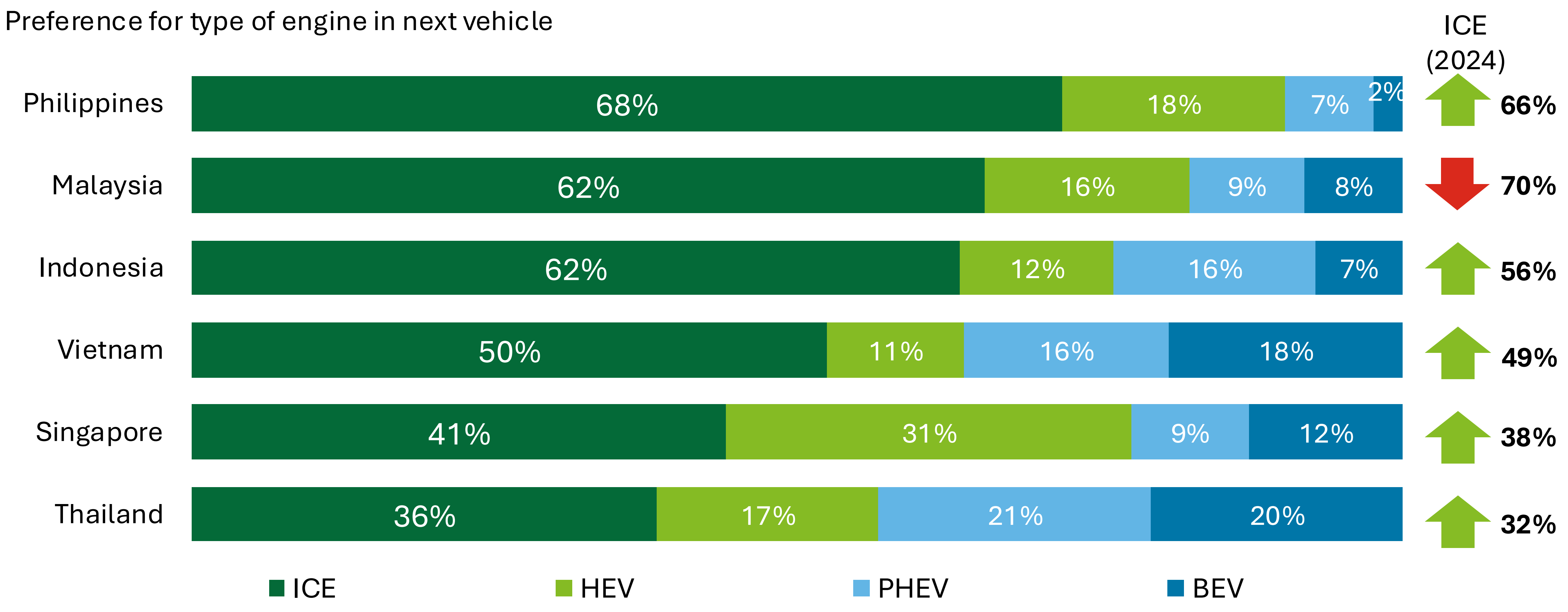
Study methodology

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

Contents

1 Future Intention and Preferences

In 2025, ICE dominates SEA market with nearly 70% share in the Philippines, growing except in Malaysia; Thailand exhibits the most balanced drivetrain preference in the region.

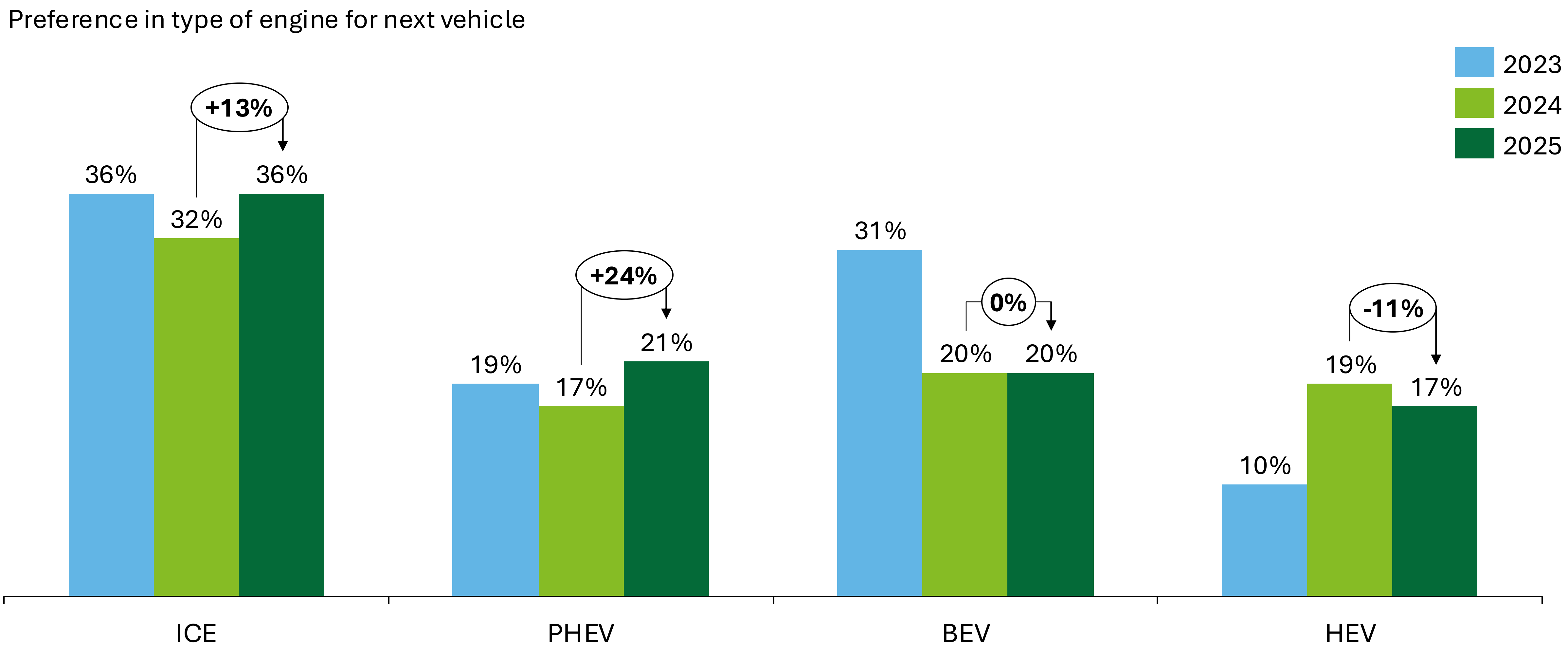


Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; percentages may not add up to 100 due to rounding.

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]

In 2025, ICE leads the Thailand market with growth; PHEVs rise, BEVs remain stable, HEVs slightly decline—consumers seek the 'Best of Both Worlds' with versatile electrified vehicles.



Lower fuel costs, Concern for the environment, and Driving experience are top 3 drivers of vehicle adoption in SEA and Thailand.

Top reasons to choose an EV as next vehicle

Factors	IN	MY	PH	SG	TH	VN
1. Lower fuel costs	**61%**	**65%**	**70%**	**62%**	**60%**	**71%**
2. Concern for the environment	**58%**	**53%**	**66%**	43%	**53%**	**62%**
3. Driving experience	**57%**	**56%**	**57%**	**44%**	**44%**	58%
4. Less maintenance	41%	47%	42%	**47%**	40%	35%
5. Concern about personal health	48%	29%	41%	24%	36%	**62%**

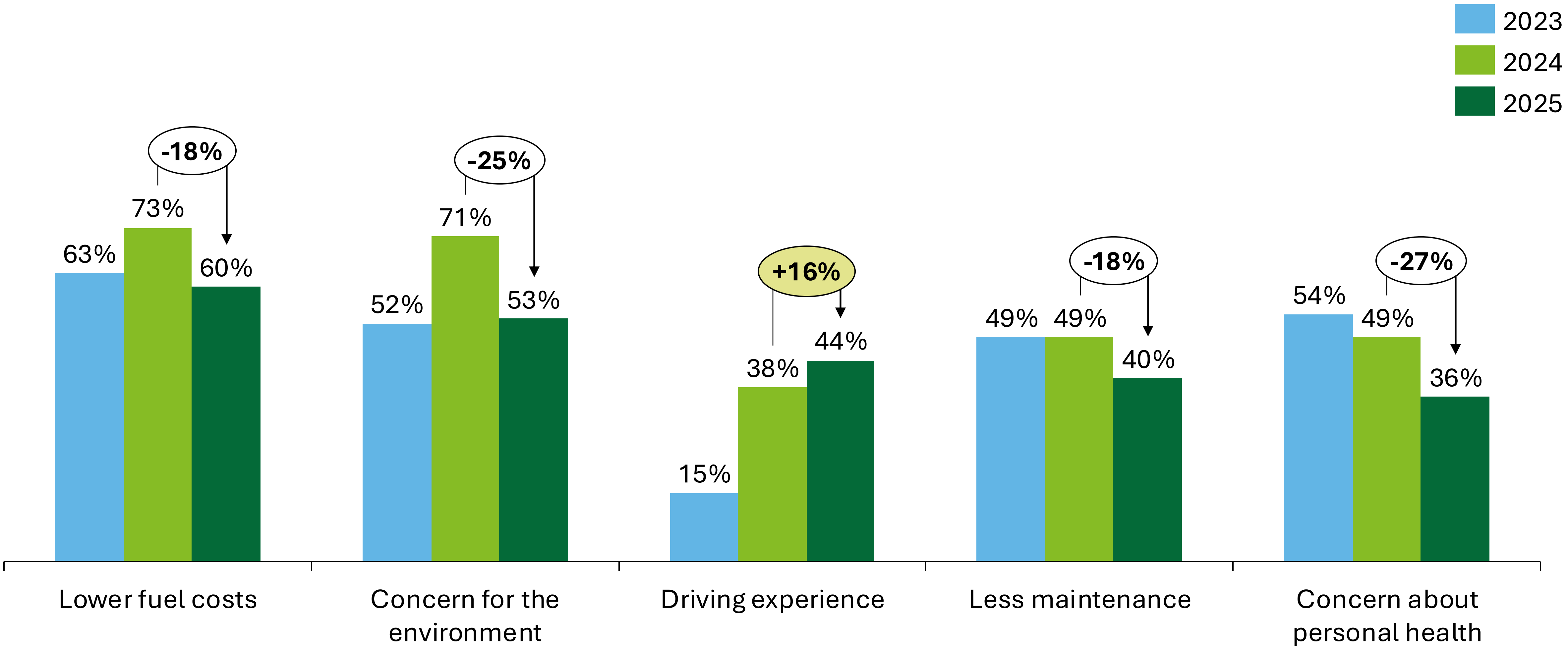
Top reasons

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]

Over the past 3 years, ICE has remained Thailand's primary choice; interest in EVs declines across most factors as 'Driving Experience' rises to 3rd most important reason.

Reason to buy EV (2023-2025)



When it comes to 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 battery-powered electric vehicles (BEVs)

Concern	IN	MY	PH	SG	TH	VN
1. Time required to charge	**42%**	**54%**	**43%**	**47%**	**45%**	**45%**
3. Lack of public EV charging infrastructure	**49%**	**54%**	**43%**	**44%**	26%	30%
2. Driving range	**42%**	44%	42%	33%	**46%**	**46%**
4. Cost/price premium	18%	**49%**	35%	38%	**50%**	28%
5. Safety concerns with battery technology	35%	42%	**44%**	**40%**	35%	28%

Most commonly cited

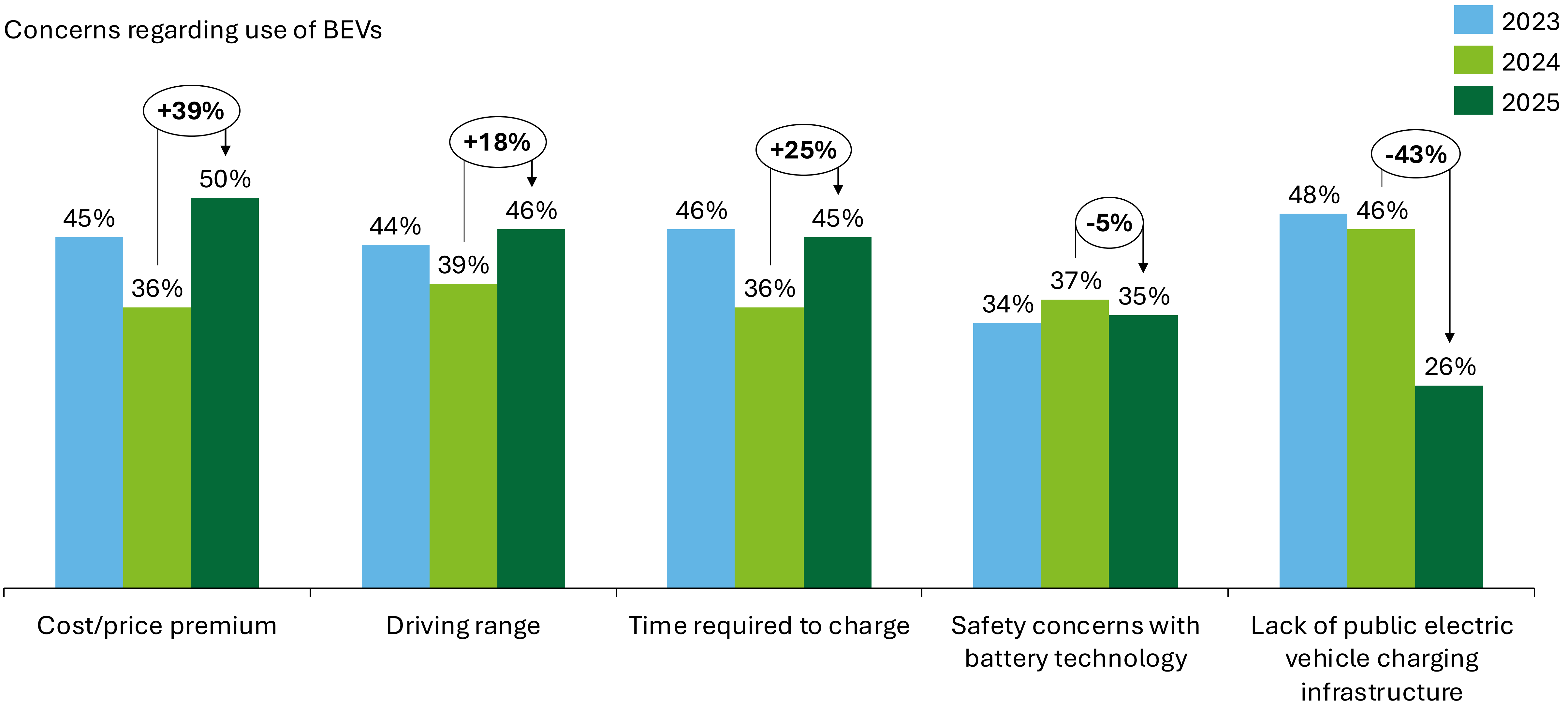
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

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]

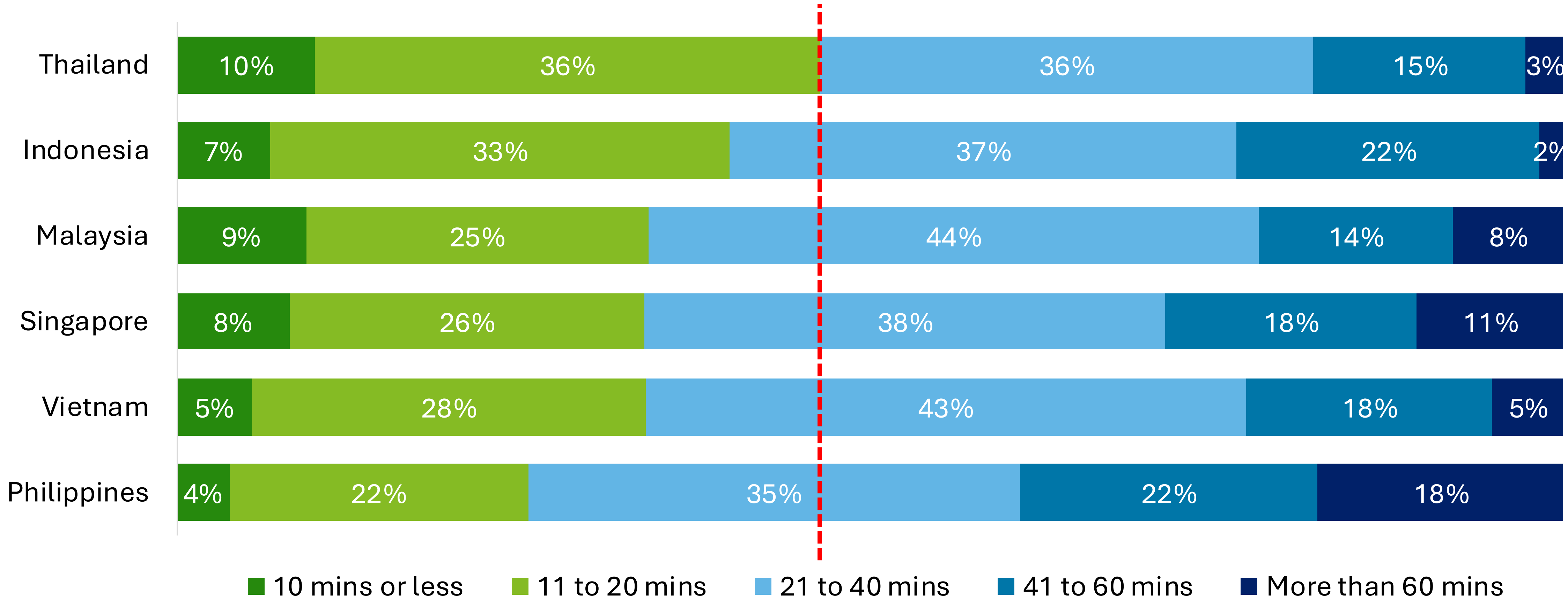
Cost/price premium, Driving range, and Time required to charge are the top three concerns for the Thai market. Lack of public EV charging infrastructure is indicating a significant insight.

Concerns regarding use of BEVs



Thai EV users are the most impatient in the region – nearly half demand sub-20-minute charging.

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]

Brand loyalty today, uncertainty tomorrow: time for OEMs to act. 4 out of 10 surveyed consumers in all SEA markets owned the same brand of vehicle prior to their current car.

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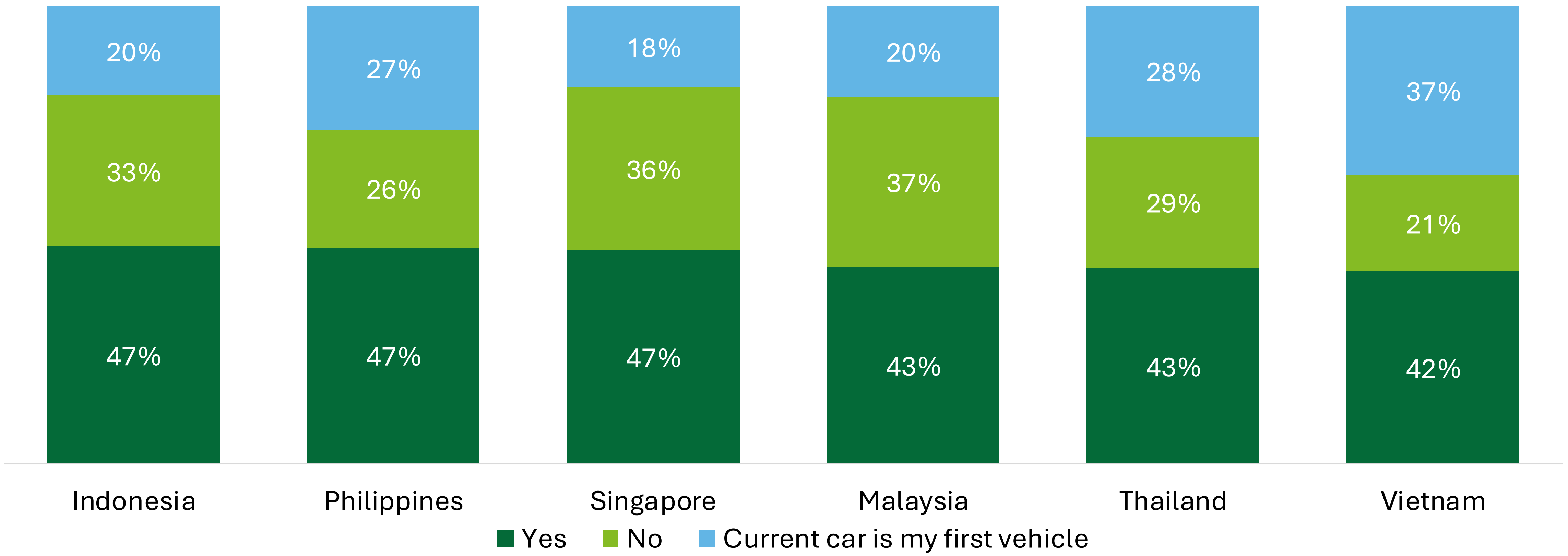
Percentage of consumers whose prior vehicle was from the same brand as current vehicle

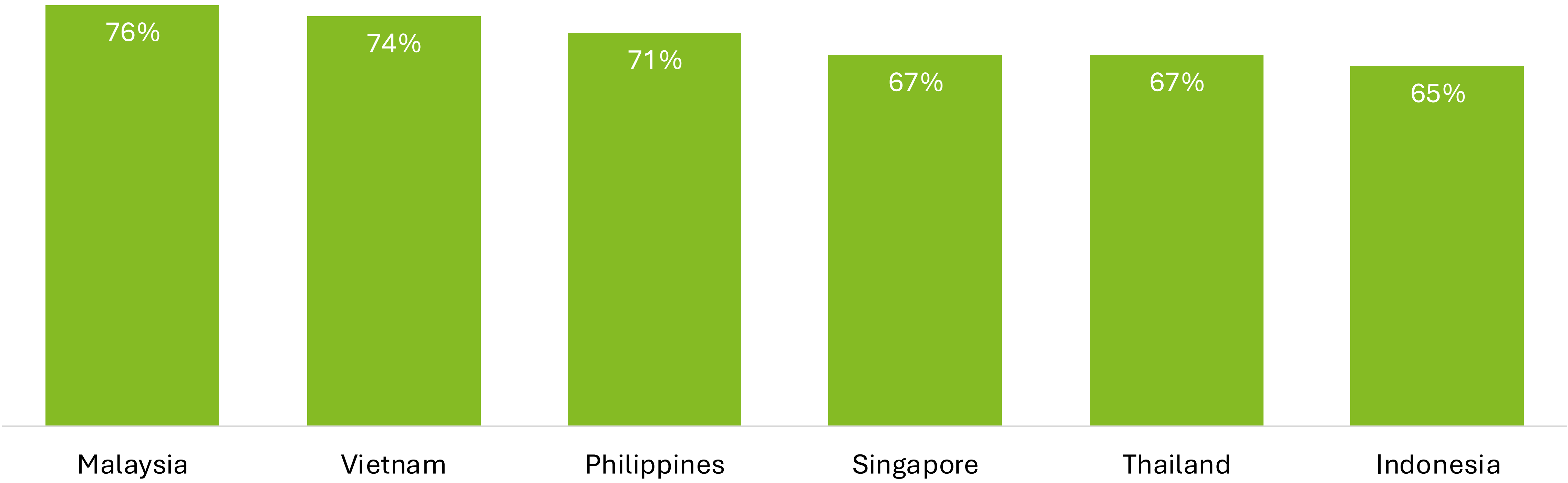


Q6. Was your prior vehicle from the same brand?

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

Two-thirds of consumers in all SEA markets plan to switch vehicle brands when shopping next, highlighting the competitive landscape in 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	IN	MY	PH	SG	TH	VN
1. Product quality	**68%**	**66%**	**70%**	**58%**	**62%**	**67%**
2. Vehicle performance (e.g., fuel efficiency, battery range)	**63%**	**68%**	**71%**	**62%**	42%	**51%**
3. Price	**54%**	**61%**	54%	**59%**	**47%**	49%
4. Vehicle features	48%	55%	**55%**	46%	**59%**	**52%**
5. Quality of overall ownership experience	44%	40%	40%	33%	28%	43%
6. Brand image	41%	30%	38%	28%	36%	41%
7. Brand familiarity	32%	31%	37%	31%	33%	29%

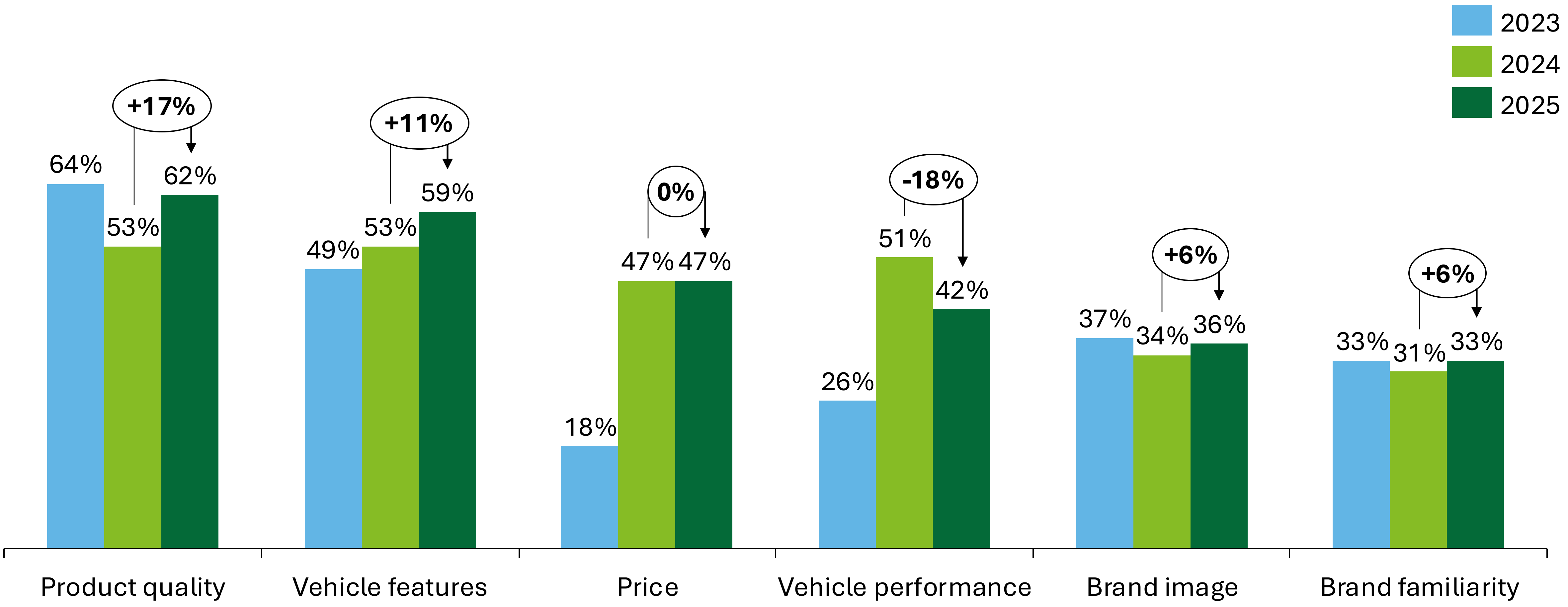
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

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]

Quality, Features, and Price have become the top priorities for Thai car buyers, surpassing branding considerations.

Purchase considerations for next vehicle



2 Usage and Ownership

Public EV charging investment may be more needed in Thailand, the Philippines, and Vietnam, as respondents there drive over 100 kms from home more often than those in Singapore and Malaysia.

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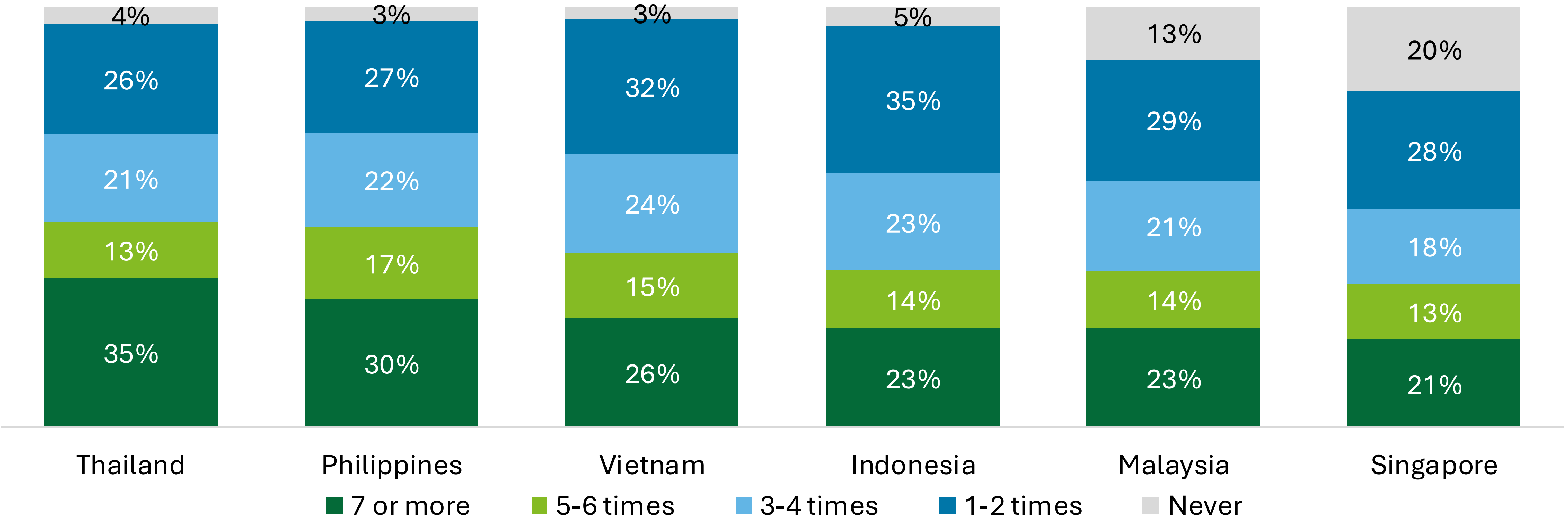
How often did consumers drive more than 100 kms from their home last month?



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 kilometers from your home?

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

Personal vehicle usage reflects differing perspectives and levels of reliance on mass transit systems across the region.

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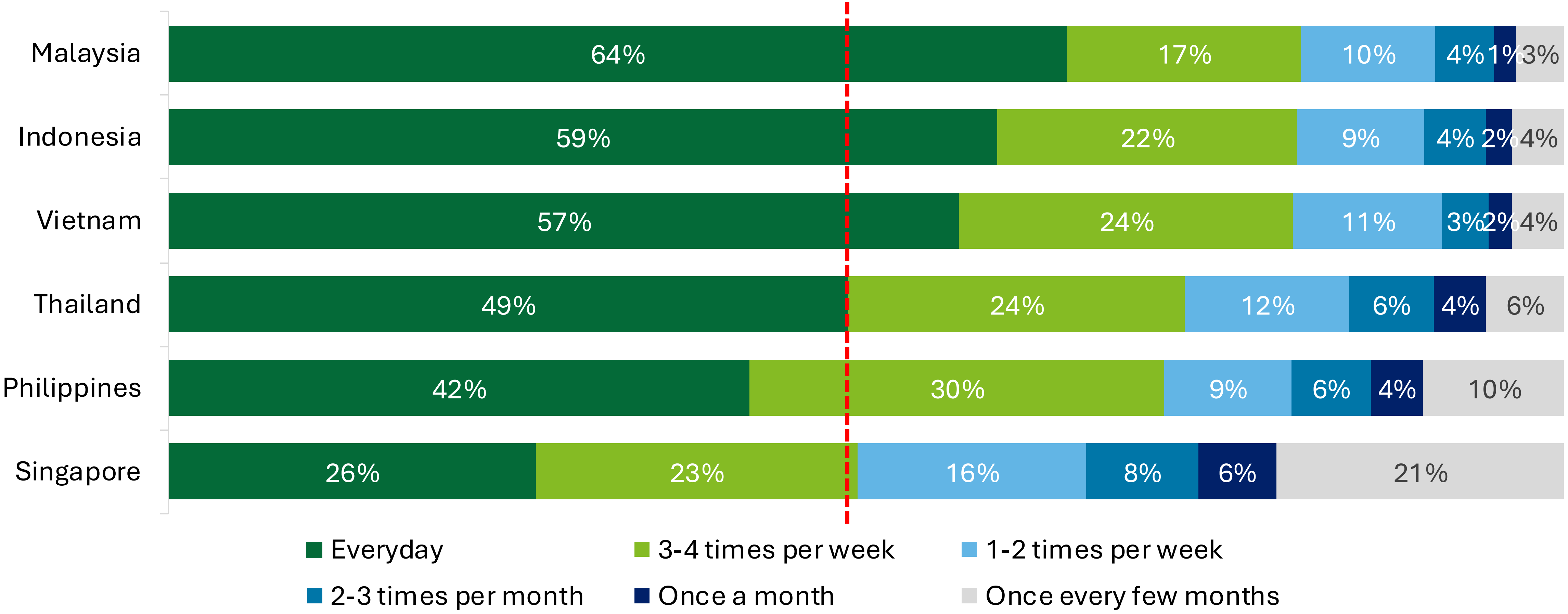
Frequency of driving personal vehicle



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]

Consumer sentiment differs among respondents when it comes to whether local manufacturing is an important criterion for choosing a vehicle.

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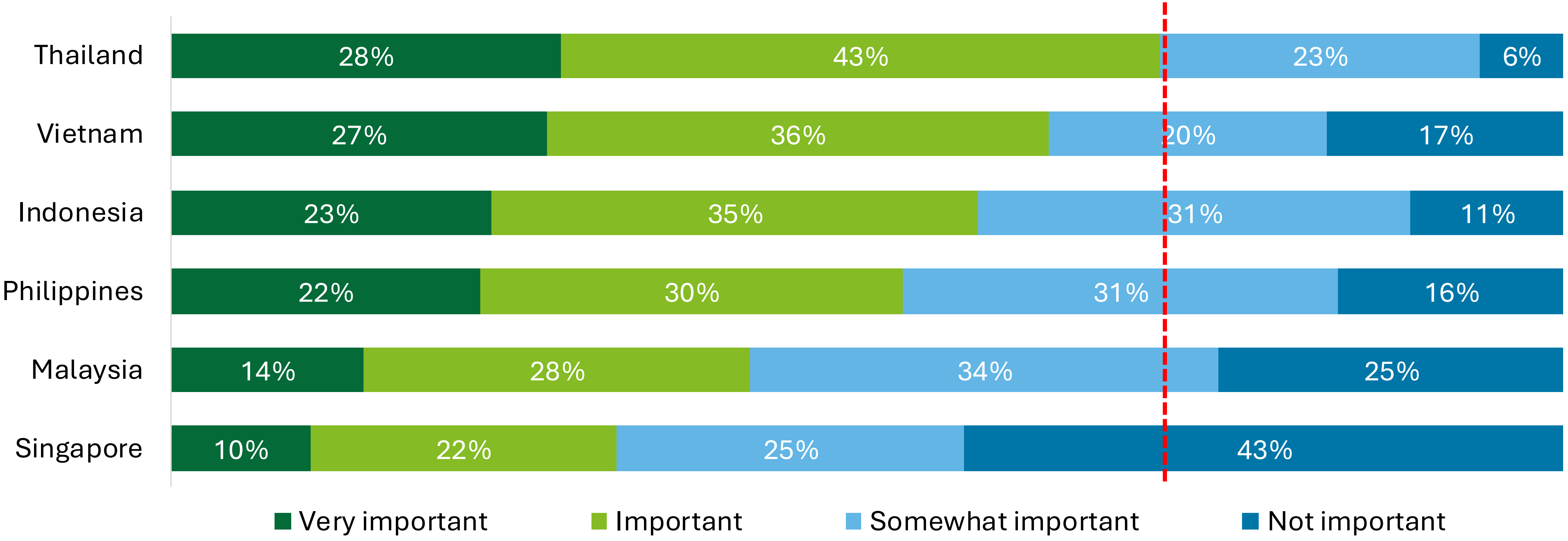
Importance of next vehicle to be manufactured locally



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]

The physical vehicle interaction before purchase is the most common preference experience, but in Thailand, three-quarters prefer reducing dealership visits, making online retail models worth exploring.

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

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

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]

NEW

Consumers in most SEA markets prioritize fast EV charging times over other factors like accessibility, amenities, and security.

Most important aspect of an EV charging experience

Aspects of the EV charging experience	IN	MY	PH	SG	TH	VN
1. Fast charging time	**36%**	**47%**	**27%**	**34%**	**22%**	**35%**
2. Accessibility of the charging station	9%	**17%**	**29%**	**15%**	13%	**16%**
3. Location is easy to find/access	**20%**	9%	9%	**15%**	**15%**	13%
4. Personal security*	8%	8%	6%	6%	**15%**	5%
5. Number of available/functional chargers	8%	6%	6%	9%	11%	8%

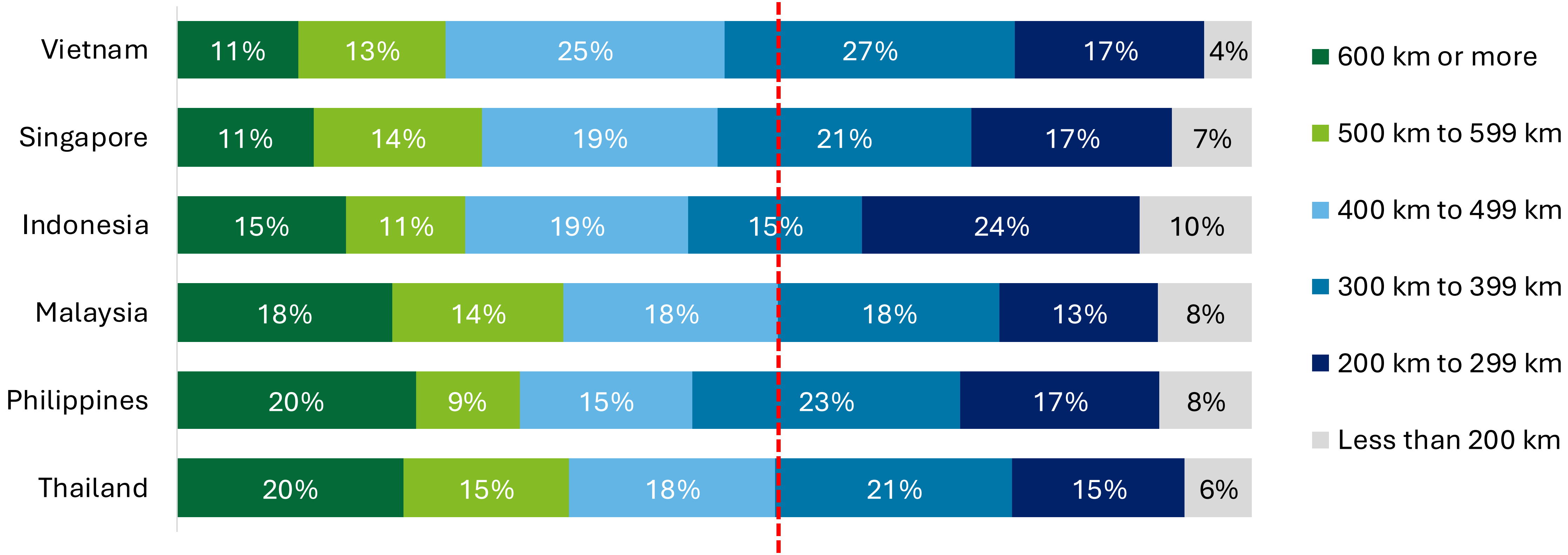
Most important

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]

In SEA, over 40% of consumers expect a BEV driving range of at least 400 kilometers.

Consumer expectations on BEV driving range (in kilometers)



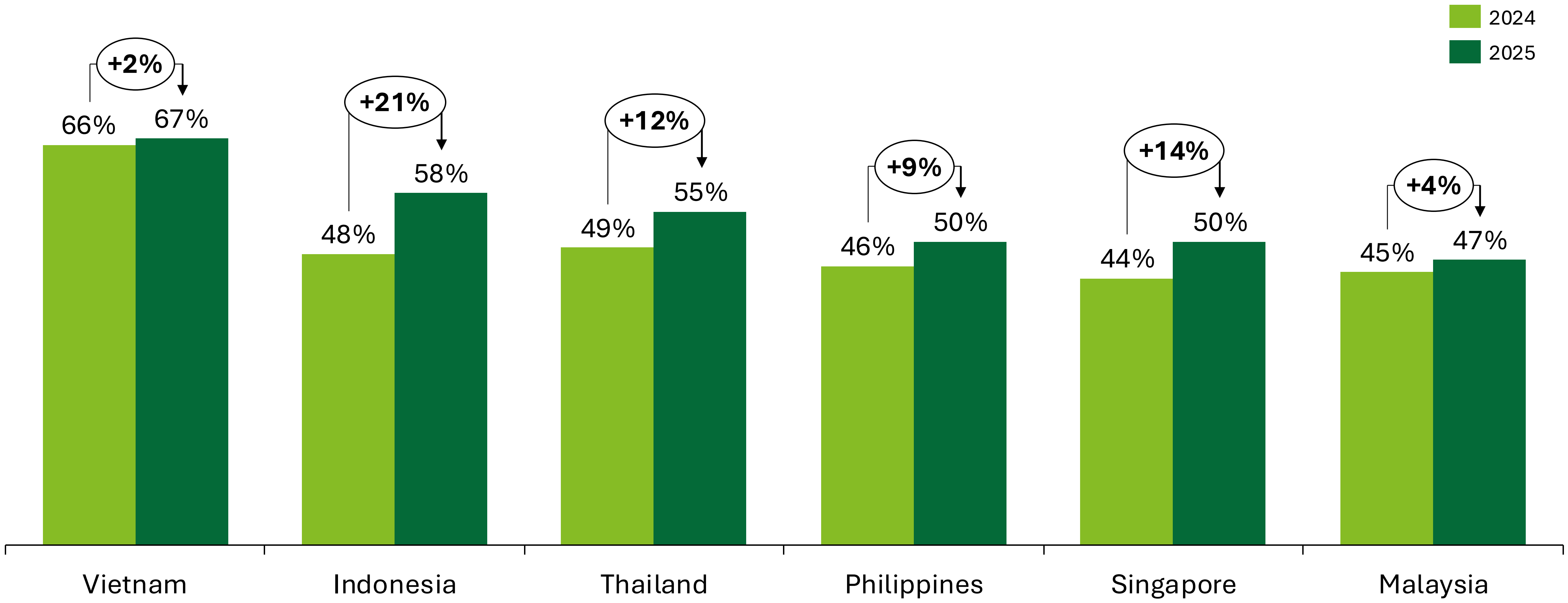
Note: Percentages may not add up to 100 due to rounding.

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]

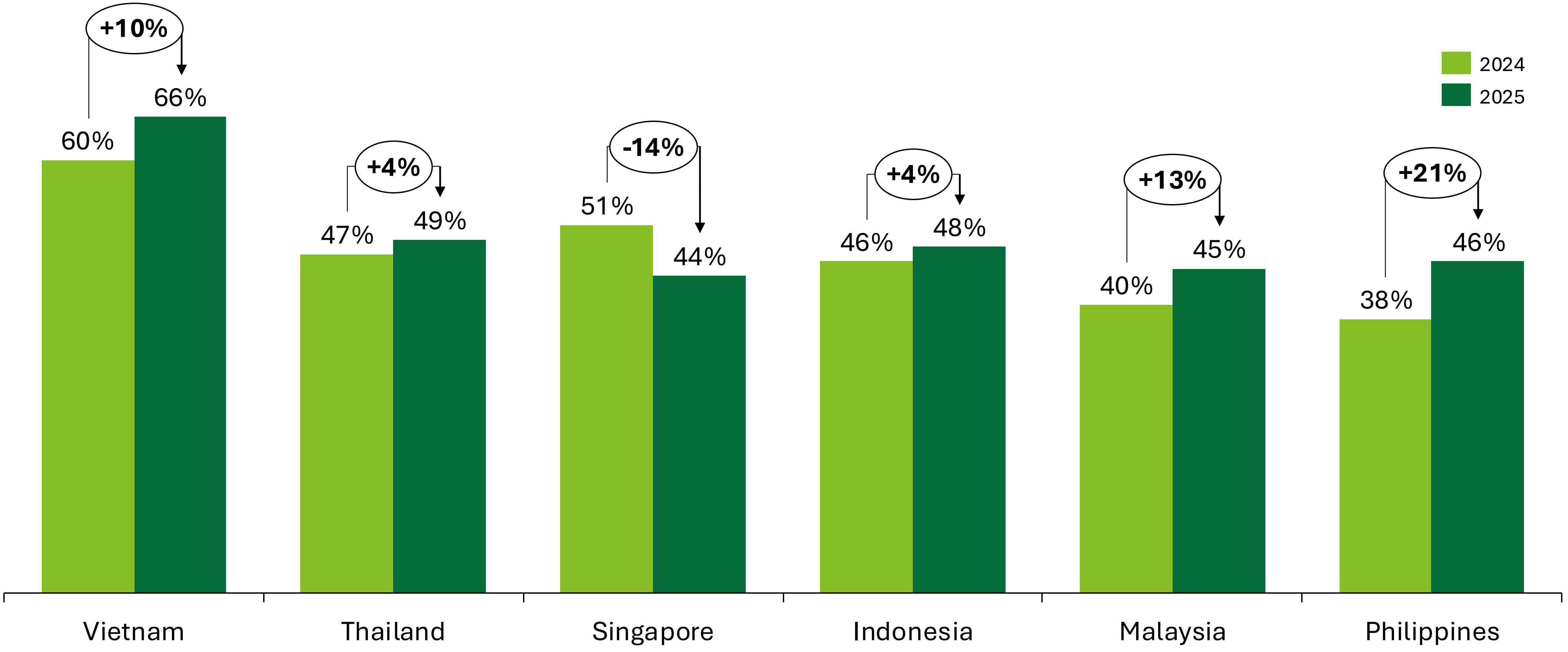
Almost half of younger consumers in the region prefer Mobility as a Service (MaaS) over traditional vehicle ownership, highlighting a growing shift in preferences.

Willingness to give up vehicle ownership in favor of mobility-as-a-service (% somewhat willing/willing/very willing) – 18- to 34-year-old respondents



Interest in vehicle subscription

A significant number of younger customers in many markets are somewhat interested in giving up vehicle ownership altogether in favor of a subscription model



3 AI and Connectivity

Consumers in SEA largely support adding artificial intelligence to vehicle systems, especially in Vietnam, Indonesia, and Thailand.

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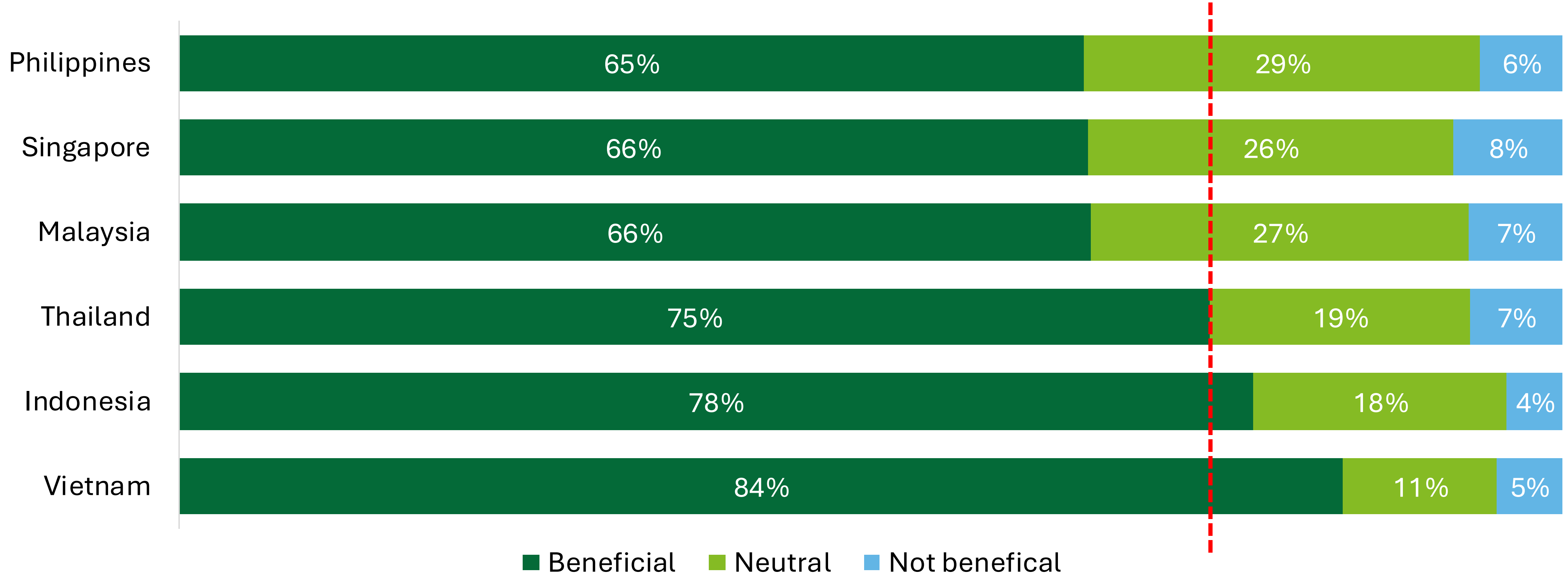
Addition of artificial intelligence in vehicle systems



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]

Consumers in SEA markets still want their next vehicle to connect with their smartphone, despite car manufacturers pushing their own connected service ecosystems.

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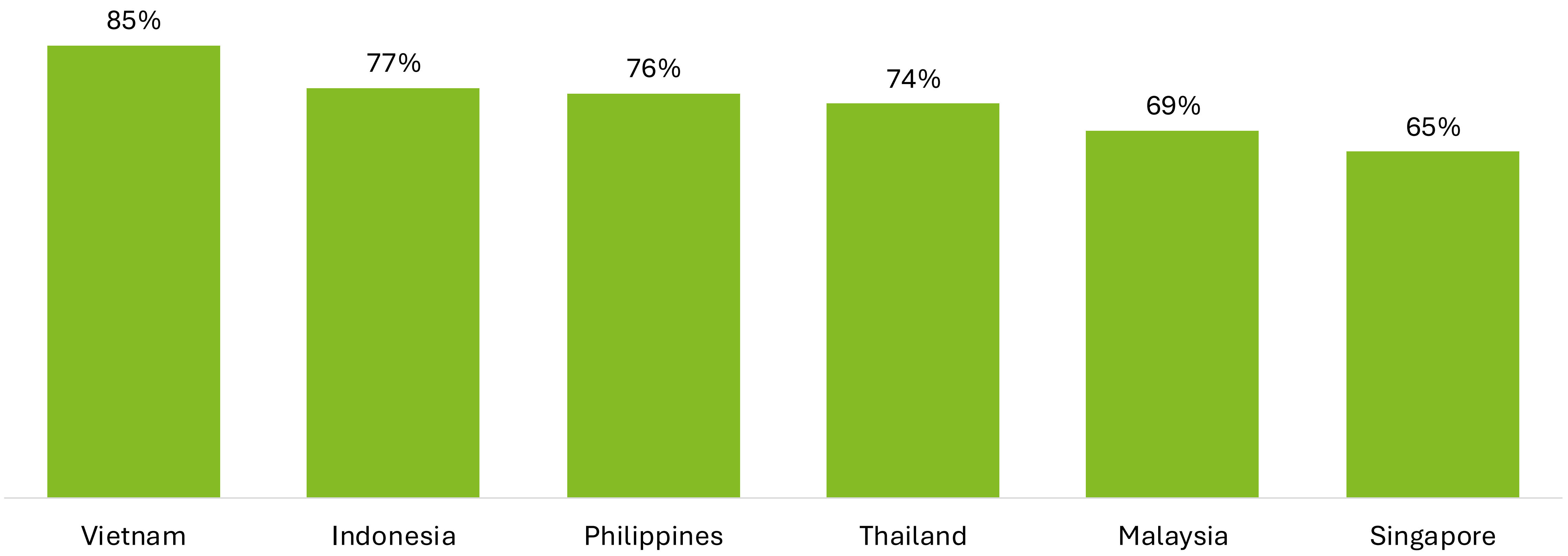
Importance of vehicle connectivity with smartphone (% somewhat/very important)



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]

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

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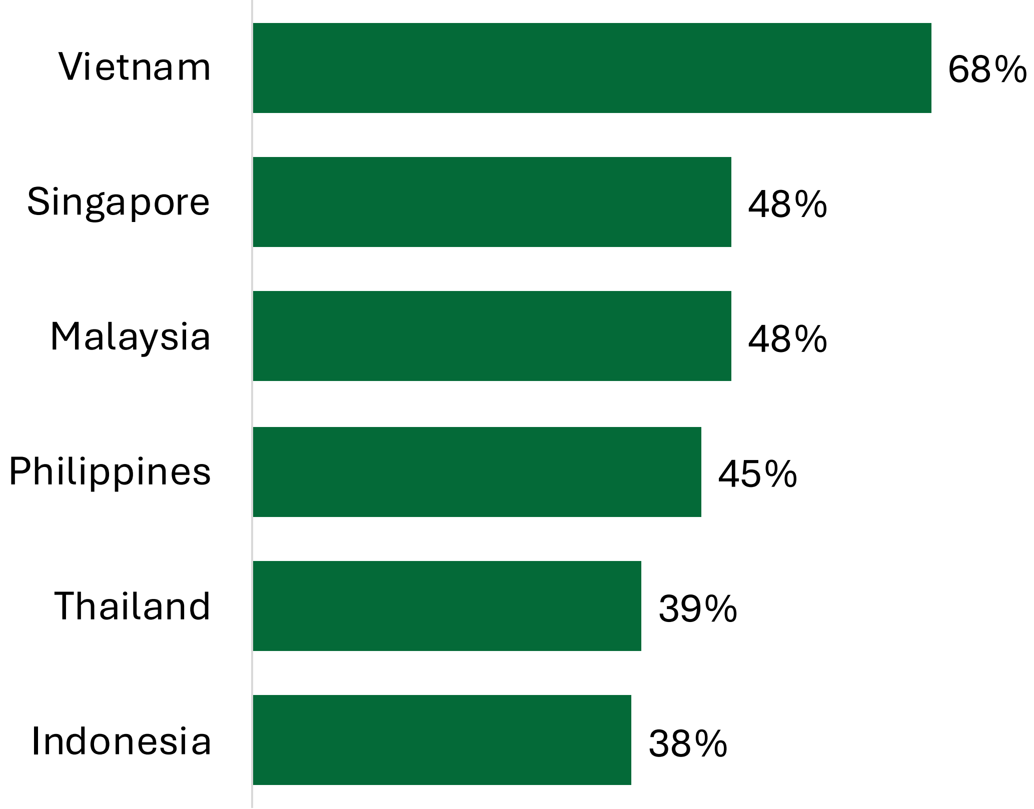
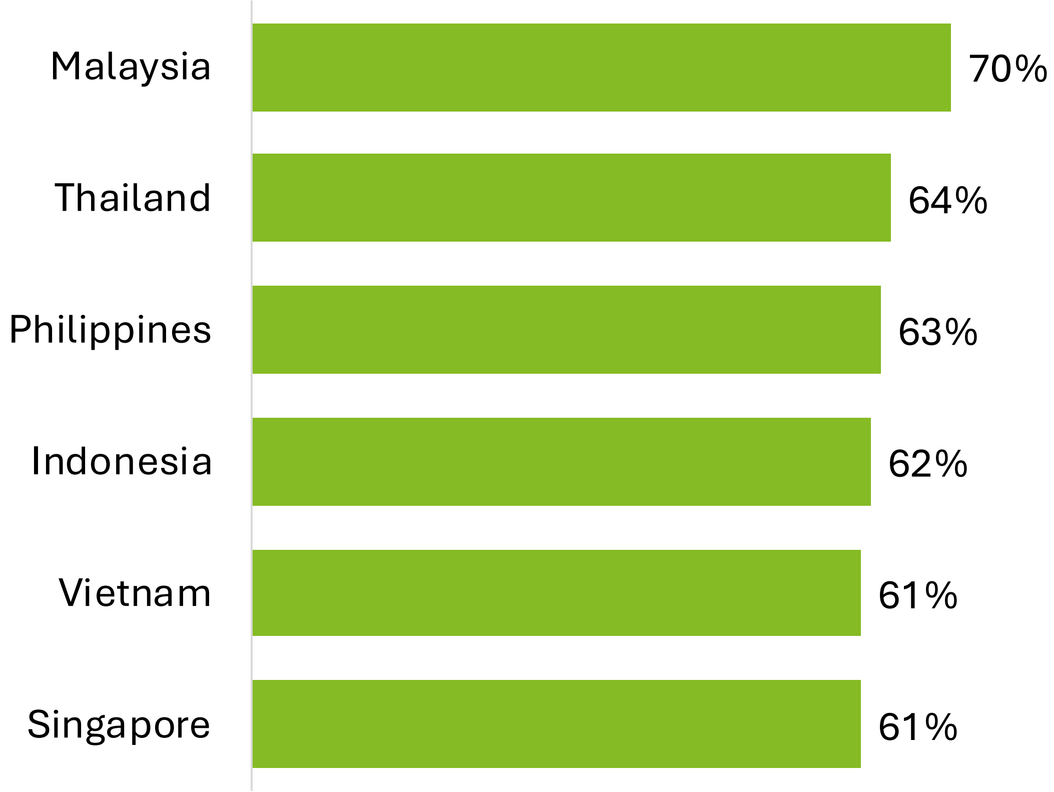
Percentage of consumers concerned about **fully autonomous robotaxi services** operating where they live



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]

Though it could mean sharing PII with manufacturers or other third parties, a significant percentage of surveyed consumers in SEA markets are interested in connected vehicle features.

NEW

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

Connected vehicle services	IN	MY	PH	SG	TH	VN
1. Anti-theft tracking	**85%**	**79%**	**86%**	**67%**	**87%**	**88%**
2. Automatic detection of vehicles and pedestrians	71%	**68%**	**78%**	**62%**	74%	**85%**
3. Emergency assistance (e.g., collision detection)	**83%**	**76%**	**86%**	**74%**	**84%**	**87%**
4. Vehicle health reporting and maintenance cost forecasts	**77%**	65%	77%	59%	77%	83%
5. Optimized vehicle insurance plan based on your driving habits	72%	60%	74%	57%	**79%**	81%
6. Warranty/recall notices	70%	65%	76%	59%	70%	75%

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	IN	MY	PH	SG	TH	VN
1. Car manufacturer	**34%**	**29%**	**34%**	**23%**	16%	**45%**
2. Vehicle dealer	11%	16%	15%	12%	**29%**	15%
3. Insurance company	13%	10%	13%	9%	15%	9%
4. Government agency	11%	9%	5%	**23%**	7%	13%

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]

Key findings

Demand for internal combustion engine (ICE) vehicles in Thailand is trending upwards, diverging from global patterns, while **plug-in hybrid electric vehicles (PHEV) have gained notable popularity.** Yet, **demand for battery electric vehicles (BEV) remains stable**.

Brand is not the primary factor in purchase decisions as consumers in Southeast Asia prioritise product features, vehicle performance, and price.

Demand for vehicle ownership has declined among younger consumers, who increasingly prefer Mobility-as-a-Service (MaaS) solutions and demonstrate higher interest in vehicle subscription services.

Consumers are becoming more accepting of AI technology and vehicle-smartphone connectivity, though concerns about safety of autonomous driving system persist.

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