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# 2026 Global Automotive Consumer Study Southeast Asia perspectives

March 2026



# Dear reader,



The global automotive industry is moving through one of the most transformative periods in its history. While innovation across the value chain continues to accelerate, the industry's centre of gravity remains the consumer—whose expectations around value, access, and experience are changing. Consumers are becoming more value-driven, seeking fairness, trust, and transparency alongside quality and innovation. Rising vehicle prices and higher financing costs have brought affordability to the forefront, prompting many to reconsider what defines value in mobility and what they expect from vehicle brands.

The global transition toward zero-emission mobility remains a defining industry priority, yet the regional policy landscape is evolving in complex ways. The withdrawal of purchase incentives, more flexible emissions targets, and rising trade barriers in the US are influencing both pricing and production strategies. Automakers are responding by expanding hybrid portfolios, refining internal-combustion offerings, and localising manufacturing to balance regulatory shifts with consumer access and affordability. In Europe and Asia, manufacturers are reimagining the path to sustainability by developing alternative mobility models rooted in more affordable, “greener” vehicles that can bring the energy transition within reach for a broader base of consumers.

The rise of software-defined vehicles is helping to reshape many aspects of the value chain, turning cars into intelligent, connected platforms that continue to evolve long after purchase. Regular over-the-air updates are helping extend vehicle lifespans and enhance ownership experiences, giving consumers new reasons to keep vehicles longer while staying current with technology. Connectivity, meanwhile, remains central to this transformation—linking vehicles, services, and ecosystems in ways that redefine the mobility experience.

These shifts are unfolding amid an environment of trade complexity, economic recalibration, and supply chain localisation. In this context, collaboration, adaptability,

and transparency are becoming an increasingly important factor to maintain resilience, profitability, and consumer trust.

For more than a decade, Deloitte's Global Automotive Consumer Study has served as a lens through which to view this rapidly evolving landscape. This year's edition continues that tradition, drawing on insights from more than 28,000 consumers across 27 key automotive markets worldwide. The findings explore how consumer attitudes toward electrification, brand loyalty, connectivity, and digital experiences are shaping the future of mobility.

This report focuses on six Southeast Asian geographies: Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam, presenting key insights in five sections, covering electric vehicle adoption, future buying intentions, connectivity, software-defined vehicles, and servicing behaviour. For more information, including a deeper dive of study results for participating countries, please click [here](#) to access the online interactive dashboard.

I hope you find the insights contained in this report useful and informative.

Warm regards,



**Seong Jin Lee**  
SEA Automotive Sector Leader  
Deloitte Singapore  
[seongjinlee@deloitte.com](mailto:seongjinlee@deloitte.com)



Deloitte Global has been exploring key consumer trends impacting a rapidly evolving global mobility ecosystem for over a decade.

**Key themes emerging over the years include:**

**2010**

Overall value ranked as the primary factor when evaluating brands

**2012**

Interest in hybrids driven by cost and convenience, while interest in connectivity centres on safety

**2017**

Interest in full autonomy grows, but consumers want a track record of safety

**2019**

Consumers “pump the brakes” on interest in autonomous vehicles

**2011**

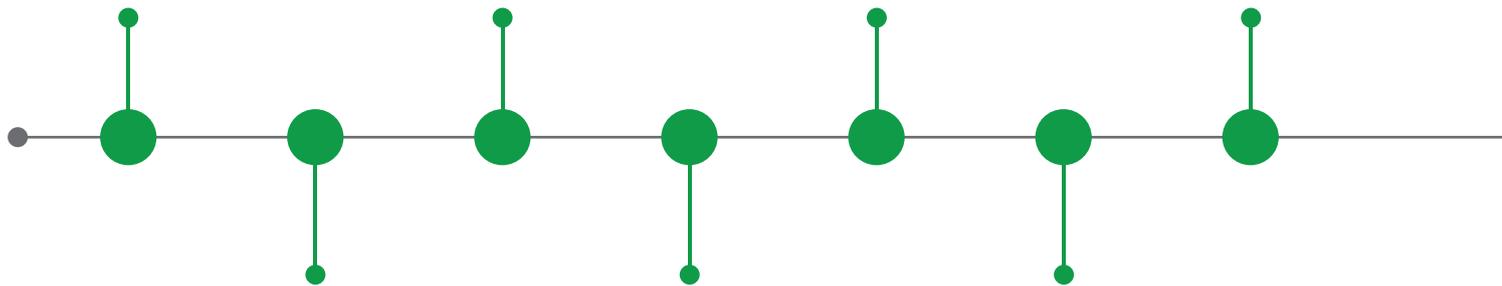
“Cockpit technology” and the shopping experience-led differentiators

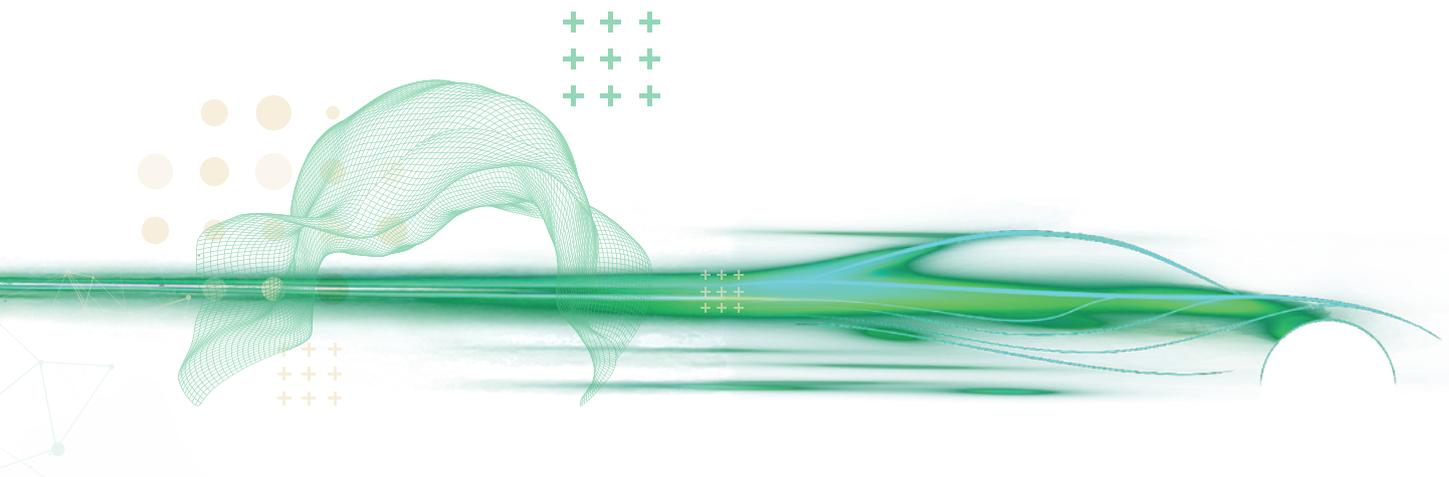
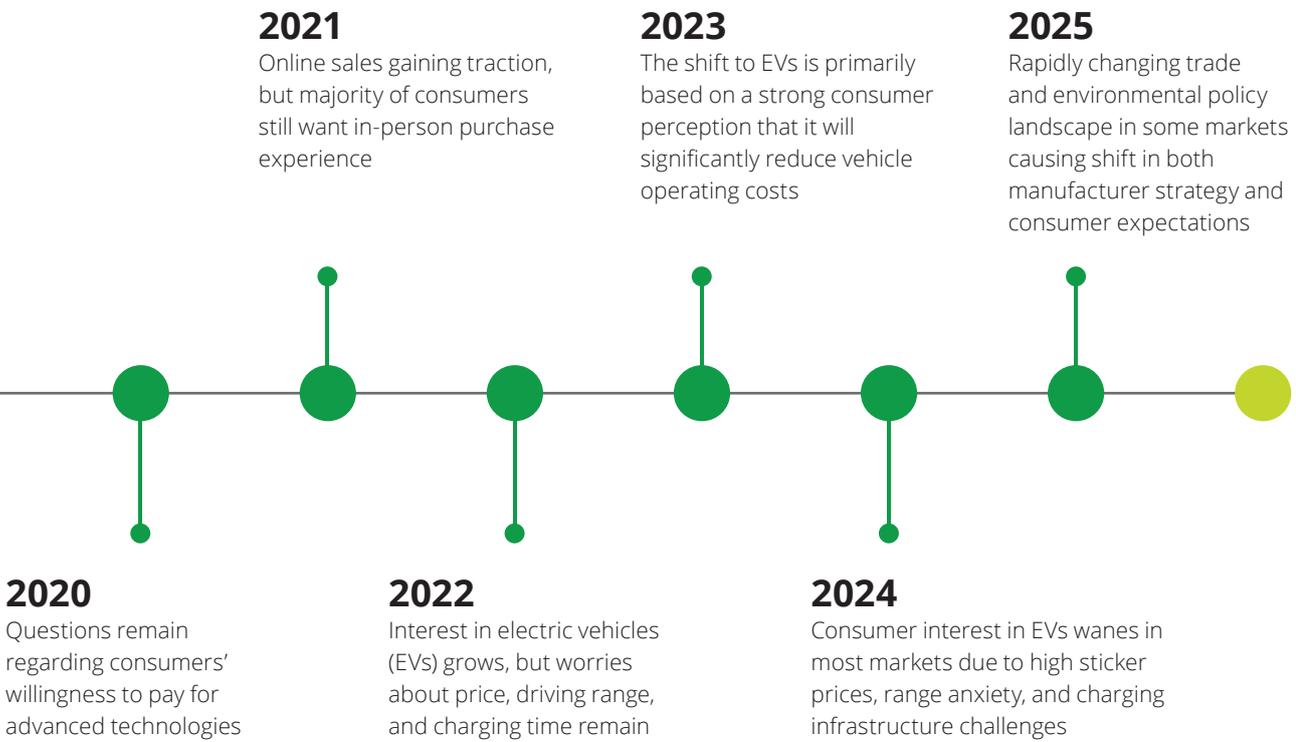
**2014**

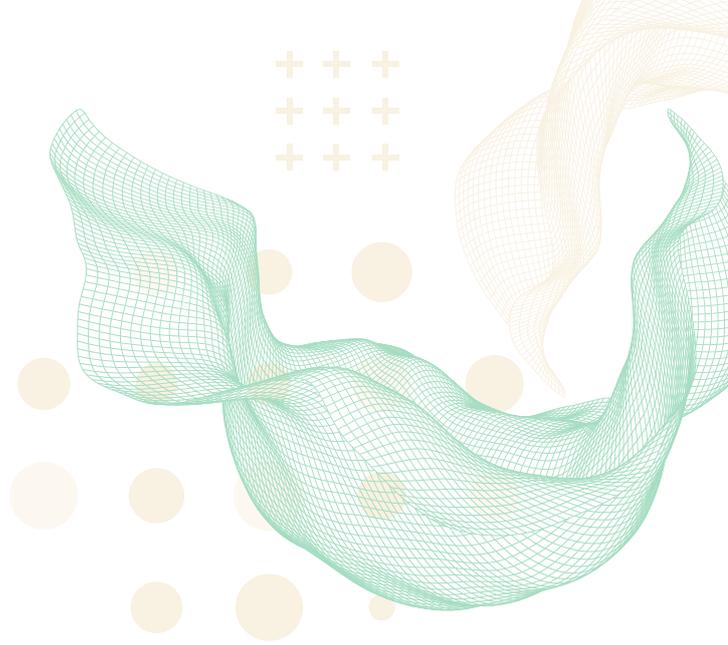
Shared mobility emerges as an alternative to owning a vehicle

**2018**

Consumers in many global markets continue to move away from internal combustion engines (ICE)



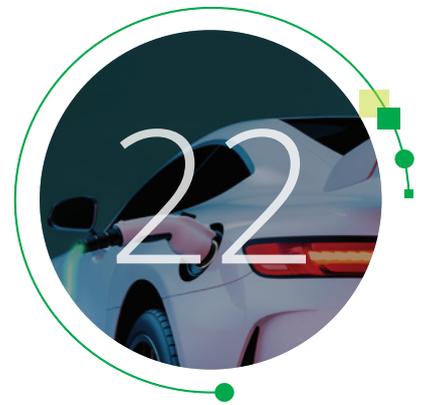




**01** Vehicle electrification



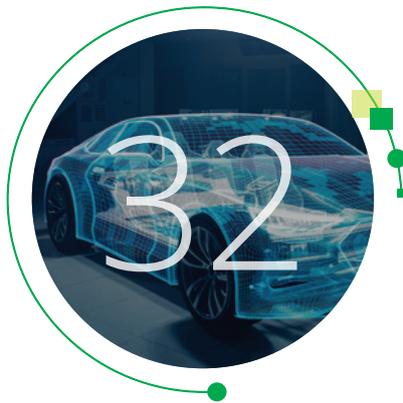
**02** Future vehicle intentions



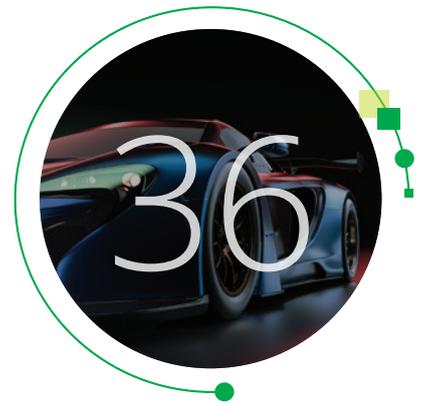
**03** Connectivity



**04** Software-defined vehicles

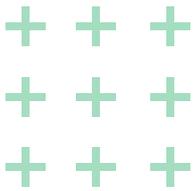


**05** Vehicle servicing



**06** Study overview

# Key findings



## 01 Alternative powertrain demand appears somewhat uneven across markets in Southeast Asia (SEA), while interest in hybrids continues to strengthen as consumers balance affordability, charging access, and everyday practicality.

Lower fuel costs remain a key motivator for consumers considering electrified options; however, concerns about driving range, charging time, cost factors, and public charging availability continue to shape adoption. Many EV intenders prefer to charge at home, while cost remains an important factor in public-charging decisions. At the same time, uncertainty around who should manage end-of-life batteries signals broader ecosystem gaps that should be addressed as electrification scales.

## 02 Brand loyalty continues to shift, with increased intended brand switching in markets with a high proportion of first-time owners.

Consumers in many SEA markets show high switching intent, emphasising the need for original equipment manufacturers (OEMs) to compete on product quality, performance, and value. Social media and influencer reviews, dealer visits, and manufacturer websites remain the most used research sources. Getting a good deal, transparent pricing, and physically experiencing the vehicle continue to play a central role in purchase decisions.

## 03 Consumers place the greatest value on connected features that enhance safety, security, and decision-making while concerns about data-sharing remain high.

Emergency assistance, anti-theft tracking, and vehicle health reporting draw the strongest willingness to pay, whereas data from synced devices, in-cabin cameras, and vehicle location raise the most concern, highlighting the need for greater trust and transparency in connected services.

## 04 Many consumers are open to artificial intelligence (AI)-driven personalisation and over-the-air (OTA)-enabled enhancements that extend a vehicle's usefulness over time.

Consumers in most SEA markets view software-defined vehicles (SDVs) as valuable, particularly when ongoing OTA updates can add features, improve safety, or boost performance. Many are willing to use AI-enabled customisation that adapts settings automatically, and a large share would keep vehicles longer if updates continued throughout ownership, positioning software as a key lever for enhancing loyalty and expanding software-based revenue opportunities.

## 05 Consumers prioritise service quality, trust, and transparency when choosing and evaluating vehicle service providers.

Authorised dealers remain the most common service destination, though independents hold a significant presence in some markets. Quality of work and trust are the primary reasons for choosing a provider, while clear explanations of pricing and the work performed define the service experience.



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# 01

## Vehicle electrification

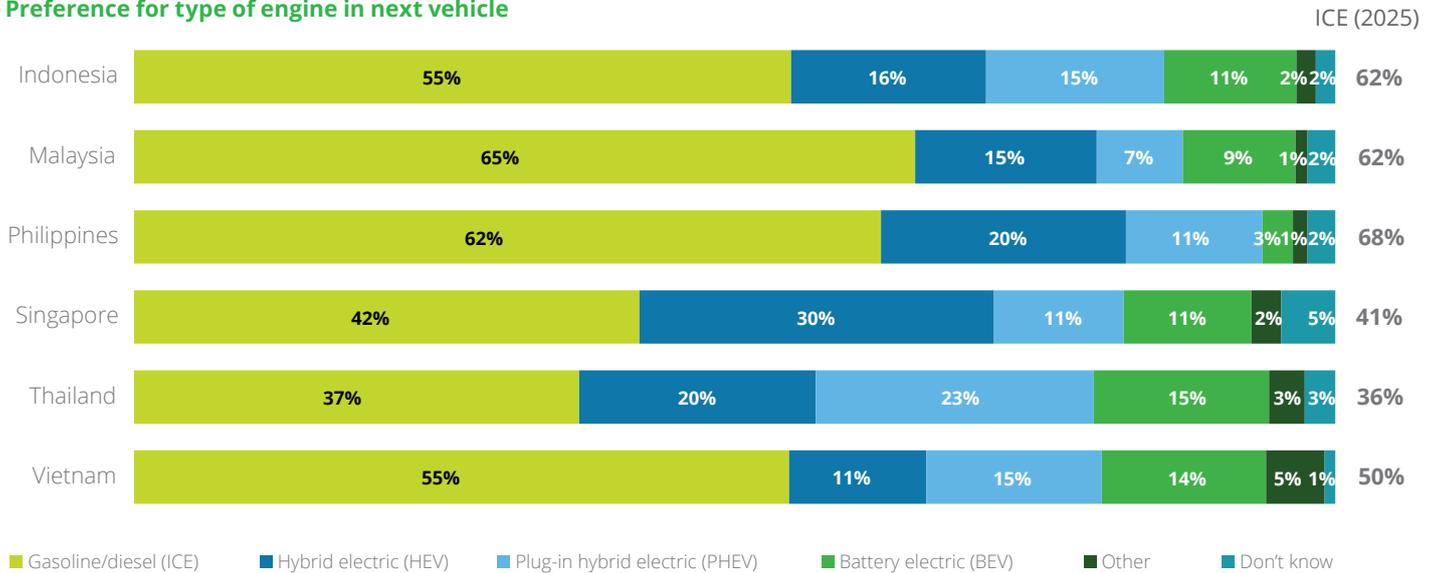
AUTONOMOUS DRIVE

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**ICE vehicles remain the dominant near-term choice across most of SEA markets, but the propulsion mix varies meaningfully by market. Singapore and Thailand stand out with lower ICE preference and stronger consideration for hybrid and electric options, suggesting greater consumer readiness for EVs.**

**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 up to 100 due to rounding.  
 Q41. What type of engine would you prefer in your next vehicle?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

**Lower fuel cost remains one of the top reasons survey respondents cite for wanting an electrified vehicle the next time they are in-market, signalling a strong desire to mitigate long-standing concerns around total cost of ownership.**

**Top reasons to choose an EV as next vehicle**

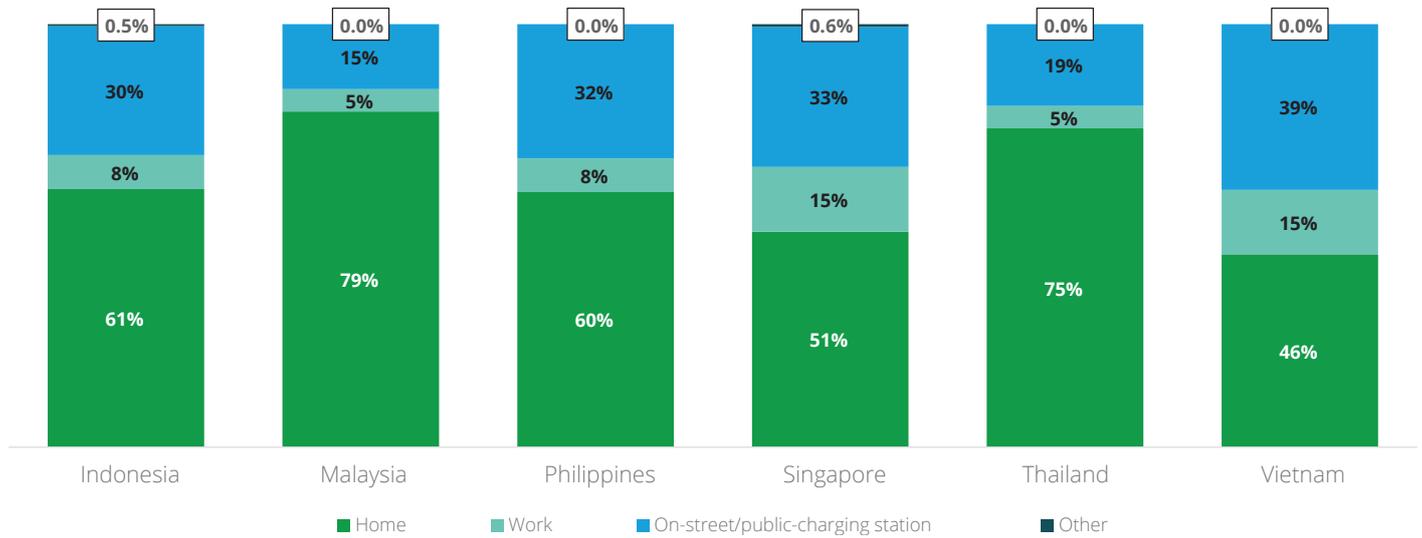
Factors	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Concern for the environment	42%	38%	49%	25%	30%	47%
Concern about personal health	29%	21%	31%	12%	24%	36%
Lower fuel costs	53%	49%	62%	50%	50%	47%
Less maintenance	33%	43%	35%	39%	39%	33%
Ability to use the vehicle as a backup battery/power source	36%	30%	38%	19%	28%	30%
Peer pressure	6%	2%	4%	4%	5%	15%
Better lifestyle experience beyond driving	37%	47%	43%	27%	33%	37%
Driving experience	48%	52%	45%	36%	39%	42%
Government incentives/subsidies/stimulus programs	32%	39%	17%	40%	27%	30%
Potential for extra taxes/levies applied to internal combustion engine vehicles	25%	20%	13%	19%	17%	23%
Potential ban on sale of new internal combustion engine vehicles	18%	13%	12%	14%	15%	22%
Availability of charging stations	47%	44%	30%	39%	50%	42%
Faster charging speed	50%	44%	32%	35%	47%	44%
Longer range	36%	25%	24%	23%	46%	30%
Better resale value	30%	21%	14%	21%	17%	23%
Brand reputation	41%	29%	27%	22%	34%	48%
Brand image	33%	21%	19%	14%	32%	29%

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= 363 [Indonesia]; 287 [Malaysia]; 311 [Philippines]; 373 [Singapore]; 519 [Thailand]; 351 [Vietnam]

Top reasons

Across SEA, most prospective battery electric vehicle (BEV) and plug-in hybrid electric vehicle (PHEV) buyers expect to charge their vehicles primarily at home. Public and on-street charging play a relatively more prominent secondary role in Vietnam, Singapore, Philippines, and Indonesia.

Expecting to charge electrified vehicle most often at...



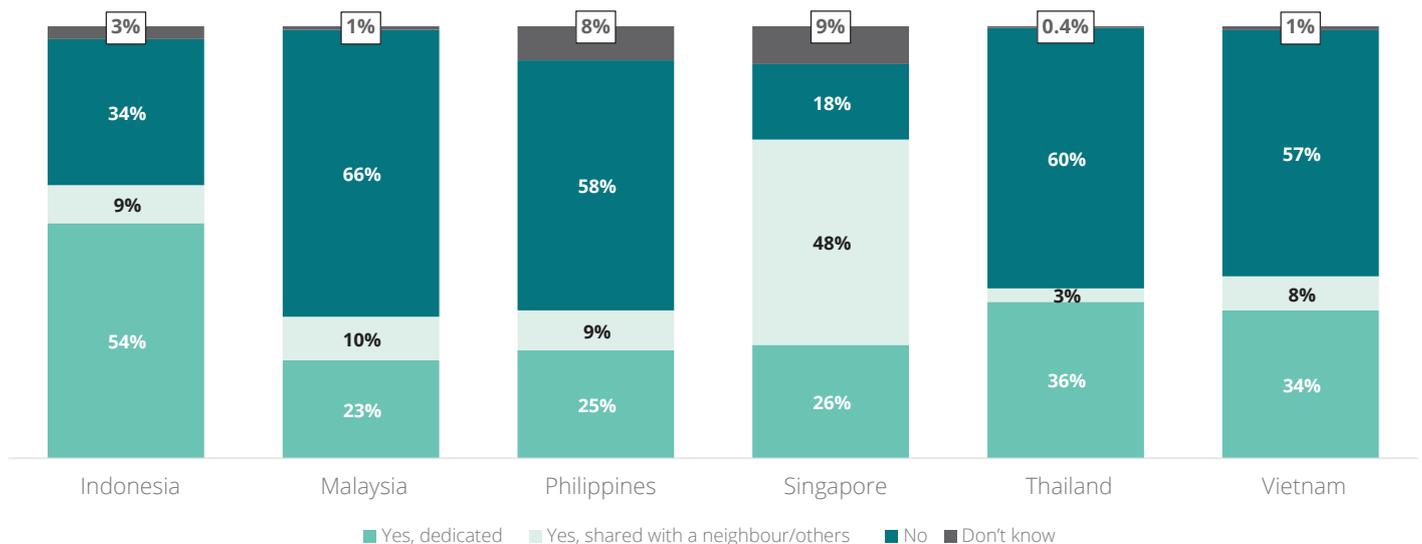
Note: Percentages may not add up to 100 due to rounding.

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

Sample size: n= 223 [Indonesia]; 150 [Malaysia]; 126 [Philippines]; 157 [Singapore]; 341 [Thailand]; 250 [Vietnam]

Although a significant number of EV intenders (BEV+PHEV) responding to the survey expect to charge their vehicles at home, many still lack access to a charger. This may be a source of concern for buyers who have not accounted for the additional installation cost.

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= 136 [Indonesia]; 119 [Malaysia]; 76 [Philippines]; 80 [Singapore]; 257 [Thailand]; 114 [Vietnam]



When charging away from home, EV intenders in most Southeast Asian markets tend to prefer dedicated EV charging stations over traditional gas stations equipped with EV chargers. Singapore and Thailand stand out, with a stronger preference for parking-based charging and traditional fuel stations with EV chargers, respectively.



**Preference for public EV charging location**

Public places	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Dedicated EV charging station	52%	37%	39%	25%	26%	42%
Traditional gas station with EV chargers	30%	24%	29%	14%	51%	17%
Vehicle dealership	3%	2%	5%	3%	3%	4%
Retail outlet/mall	4%	11%	13%	10%	9%	6%
Parking lot	5%	13%	9%	33%	6%	19%
On-street parking	2%	3%	4%	8%	3%	3%
Community/public building	4%	3%	1%	5%	2%	9%
Hotel	0.5%	6%	2%	1%	0.3%	0%
Other	0%	1%	0%	1%	0%	0%

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

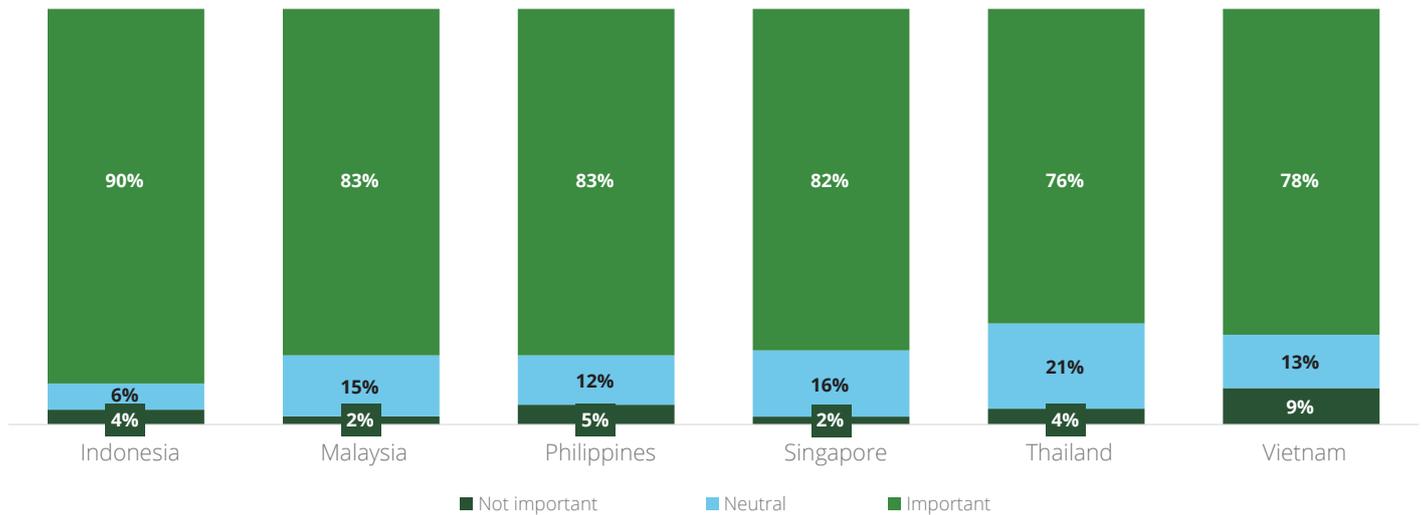
Q45. Where would you most want to charge your EV when you are away from home?

Sample size: n= 223 [Indonesia]; 150 [Malaysia]; 126 [Philippines]; 157 [Singapore]; 341 [Thailand]; 250 [Vietnam]

 Most preferred location

Across the Southeast Asian markets surveyed, charging costs are considered an important factor when choosing a public location to charge an EV. This highlights the importance of affordable charging rates for an increasing number of cost-conscious consumers.

**Importance of charging cost when choosing public EV charging**



Note: Percentages may not add up to 100 due to rounding; importance % is a sum of somewhat important and very important.

Q46. How important is charging cost when it comes to choosing a public location to charge your vehicle?

Sample size: n= 223 [Indonesia]; 150 [Malaysia]; 126 [Philippines]; 157 [Singapore]; 341 [Thailand]; 250 [Vietnam]

Card payments are the most preferred method for public EV charging in Malaysia, Philippines, and Singapore. In contrast, smartphone app-based and QR code payments feature prominently in Indonesia, Thailand, and Vietnam, highlighting significant variations in payment preferences across these markets.

**Preferred method to pay for public EV charging**

Payment method	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Charging network app on your smartphone	44%	29%	18%	25%	39%	39%
Credit/debit card	6%	44%	41%	52%	13%	8%
Pre-paid subscription plan	10%	5%	10%	5%	6%	15%
Loyalty points	1%	3%	7%	6%	2%	2%
Charging card/badge/pass provided by a third-party player	1%	7%	10%	4%	4%	10%
QR code/Unified Payments Interface (UPI)	38%	13%	12%	7%	35%	26%
Other	0%	0%	2%	0%	0%	0%

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

Q47. How would you most prefer to pay for public EV charging?

Sample size: n= 223 [Indonesia]; 150 [Malaysia]; 126 [Philippines]; 157 [Singapore]; 341 [Thailand]; 250 [Vietnam]

■ Most preferred

Across SEA, the most cited concerns around BEVs centre on charging time, driving range, cost considerations, and access to public charging infrastructure. Singapore stands out with battery safety emerging as a comparatively more prominent concern relative to other markets.

Greatest concern regarding all BEVs

Concern	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Driving range	46%	42%	40%	29%	43%	39%
Cost/price premium	31%	44%	36%	36%	48%	25%
Cold weather performance	43%	17%	23%	12%	28%	29%
Increased need to plan my trips	13%	24%	19%	21%	24%	21%
Uncertain resale value	38%	29%	17%	23%	21%	22%
Potential for extra taxes/levies associated with BEVs	16%	21%	19%	18%	19%	23%
Time required to charge	46%	49%	41%	43%	42%	40%
Ongoing charging and running costs	28%	31%	27%	27%	37%	31%
Cost to eventually replace the battery	39%	48%	41%	36%	40%	24%
Lack of knowledge or understanding about EVs/EV technology	35%	35%	30%	22%	30%	38%
Lack of public EV charging infrastructure	53%	51%	48%	34%	28%	26%
Lack of charger at home	31%	37%	32%	27%	22%	26%
Lack of alternate power source (e.g., solar) at home	20%	29%	32%	19%	18%	38%
Safety concerns with battery technology	41%	39%	39%	37%	36%	30%
End-to-end sustainability (i.e., battery manufacturing/recycling)	16%	26%	31%	19%	29%	11%
Lack of choice regarding brands/models	13%	14%	15%	13%	16%	5%

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

Q48. What are your biggest concerns regarding all battery-powered EVs? (Please select all that apply.)

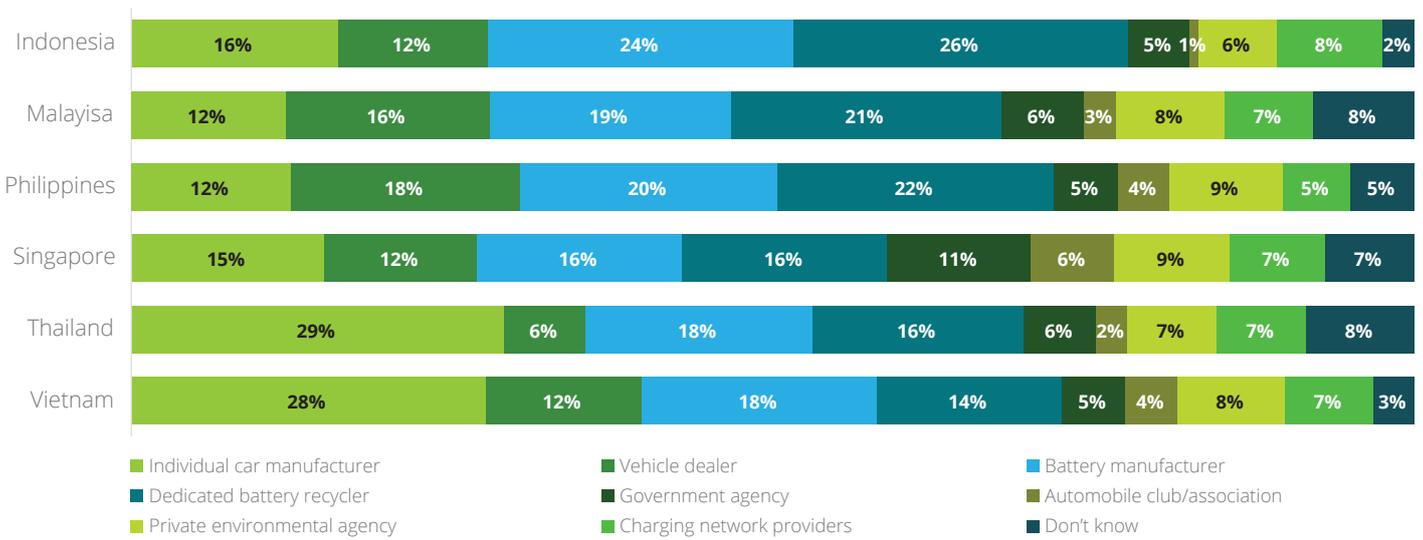
Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

 Most commonly cited



**Opinions vary on who should oversee end-of-life EV battery management, with responsibility often assigned to car makers, dealers, battery manufacturers, and battery recyclers, highlighting the lack of clear direction on how this important piece of the emerging ecosystem could evolve.**

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



Note: Percentage for "Other" not shown. Total percentages may not add up to 100 as "Other" percentage is not shown and/or due to rounding.  
 Q49. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]





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02

# Future vehicle intentions

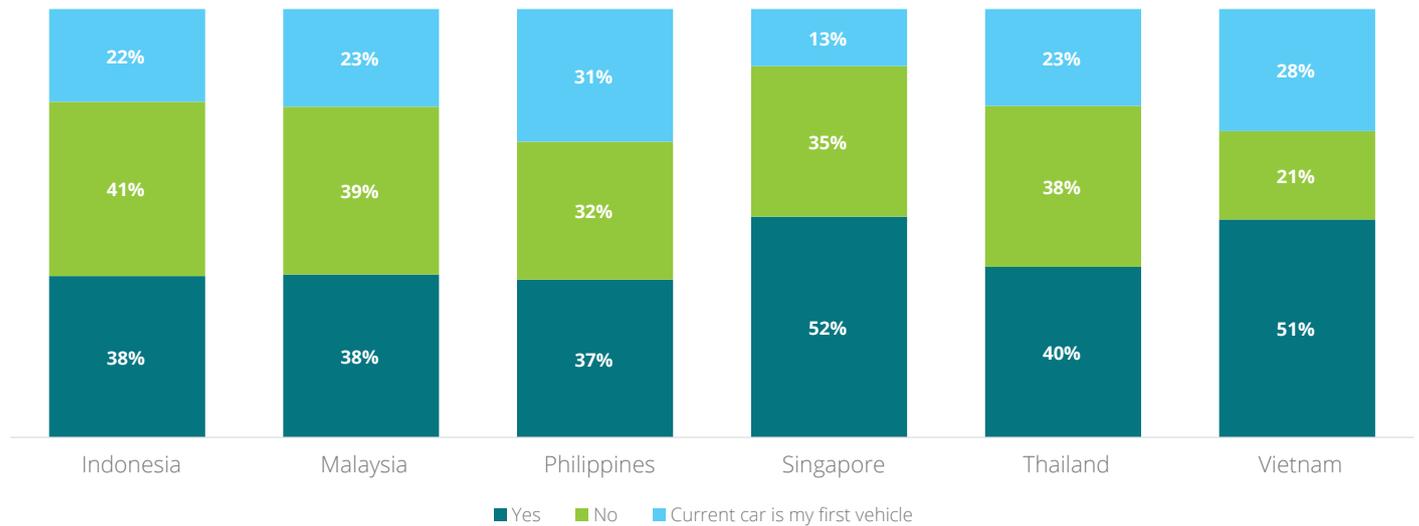
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Singapore and Vietnam stand out with higher brand loyalty, while survey respondents in Indonesia, Malaysia, and Thailand exhibit more brand switching behaviour. The Philippines has a larger first-time owner segment, highlighting the differing retention and acquisition dynamics across these markets.

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



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

Q9. Was your prior vehicle from the same brand?

Sample size: n= 629 [Indonesia]; 820 [Malaysia]; 540 [Philippines]; 526 [Singapore]; 681 [Thailand]; 674 [Vietnam]

Consumers surveyed in most SEA markets exhibit a high likelihood of switching to a different brand for their next vehicle, perhaps due to larger first-time owner segment with less entrenched brand loyalty. This reinforces the importance of focusing on the drivers of brand value over price to win and retain customers in competitive, rapidly evolving markets.

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= 603 [Indonesia]; 751 [Malaysia]; 517 [Philippines]; 492 [Singapore]; 646 [Thailand]; 658 [Vietnam]

Across SEA markets, product quality, vehicle performance, and price are the leading drivers of brand choice, while factors such as advertising and brand affiliations remain less influential, suggesting that consumers prioritise core product and value attributes.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Previous sales experience	22%	11%	11%	11%	18%	13%
Previous service experience	24%	17%	18%	15%	21%	20%
Product quality	68%	62%	64%	53%	58%	51%
Brand advertising	17%	12%	10%	8%	13%	15%
Brand image	43%	31%	35%	24%	34%	36%
Brand affiliations (e.g., sponsorships, partners)	11%	8%	10%	9%	7%	19%
Brand familiarity	32%	29%	38%	28%	29%	25%
Quality of overall ownership experience	41%	35%	44%	30%	26%	34%
Vehicle features/technology	49%	51%	50%	32%	50%	44%
Availability of battery electric vehicles/hybrid options	22%	19%	24%	22%	29%	23%
Vehicle performance (e.g., fuel efficiency, battery range)	66%	62%	67%	50%	47%	46%
Price	54%	56%	52%	50%	44%	37%
Vehicle service and maintenance network	39%	43%	47%	30%	36%	29%
Easy financing options	24%	27%	29%	18%	16%	21%

Note: Sum of the percentages exceed 100% as respondents can select multiple options; "Other" not shown due the low response rate.

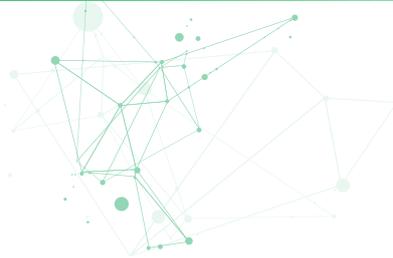
Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

Most commonly cited

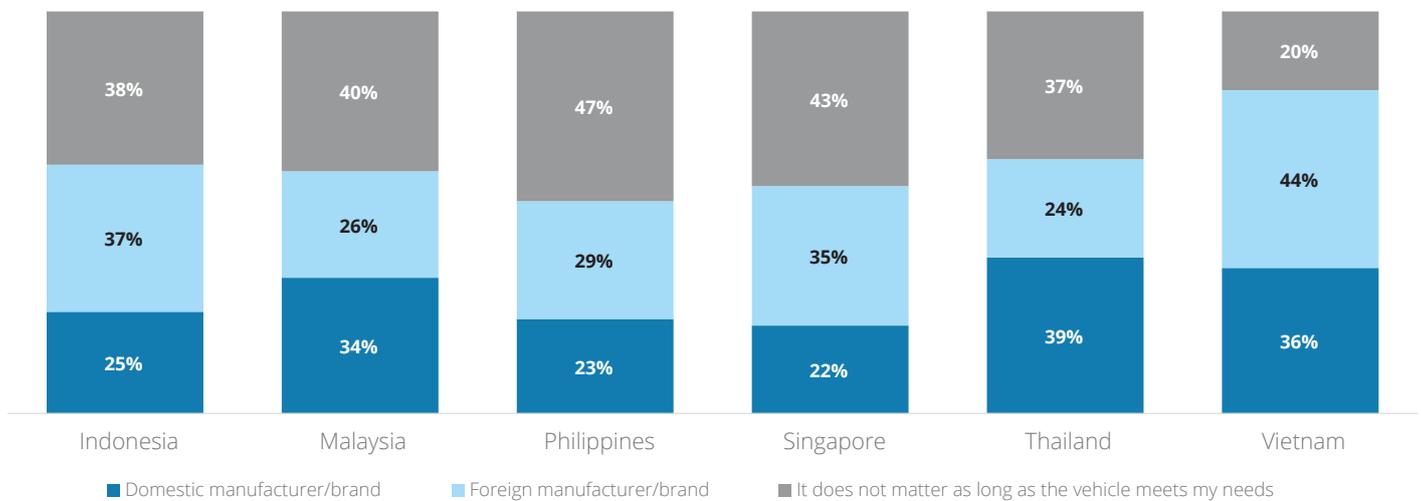




**Domestic brand preference is relatively stronger among survey respondents in Thailand, Vietnam, and Malaysia, while lower in Singapore and Philippines. The results highlight meaningful cross-market variation in the role brand origin plays in shaping vehicle purchase preferences across SEA.**



**Preferred organisations for next vehicle purchase**



Note: Percentages may not add up to 100 due to rounding.  
 Q50. From which of the following are you most interested in acquiring your next vehicle?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

**For the next vehicle purchase, social media and influencer reviews are the most used information sources in some SEA markets, along with dealer visits and manufacturer websites. Printed media remains one of the least relied-upon channels, reinforcing the decision taken by many OEMs to redirect their marketing budget in favour of digital channels.**

### Information sources for next vehicle purchase

Information sources	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Word of mouth	36%	30%	34%	35%	29%	24%
Printed media	19%	15%	15%	14%	7%	19%
Online media and auto portals	57%	47%	42%	32%	48%	46%
Vehicle owner forum/blogs	30%	36%	40%	31%	25%	31%
Social media and influencer reviews	62%	51%	50%	31%	61%	57%
Manufacturer website	47%	46%	55%	44%	42%	49%
Dealer website	35%	43%	42%	41%	37%	43%
Dealer visit	55%	53%	53%	44%	52%	51%

Q30. Which of the following sources would you use to gather information about your next vehicle? Please select all that apply.  
Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

 Most commonly cited

**According to survey respondents, the most important aspects of their next vehicle purchase experience centre on obtaining a good deal with transparent pricing and direct physical interaction—reinforcing why dealer visits remain a primary source of information for many consumers.**

### Most important aspects of next vehicle purchase experience

Drivers of brand choice	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Getting all my questions answered	30%	23%	36%	21%	26%	28%
Making good use of my time	12%	19%	12%	17%	27%	36%
Physical interaction with the vehicle (i.e., test drive)	40%	43%	51%	42%	36%	32%
Building trust in the salesperson	18%	17%	15%	14%	16%	18%
Ability to complete all or some of the process virtually	17%	19%	17%	18%	13%	22%
Convenient location	19%	19%	22%	22%	16%	16%
Getting a good deal	45%	56%	50%	53%	47%	35%
Transparent pricing	51%	48%	47%	54%	36%	45%
Low pressure experience	14%	13%	11%	14%	11%	16%
Having a resource for post-purchase needs	22%	21%	18%	21%	43%	25%
To be offered different financing and usage-based models	33%	21%	21%	23%	29%	27%

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

Q51. What are the top three most important aspects of your next vehicle purchase experience?

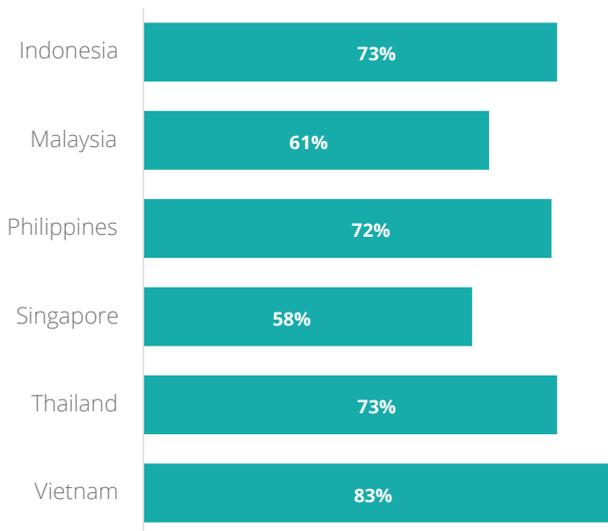
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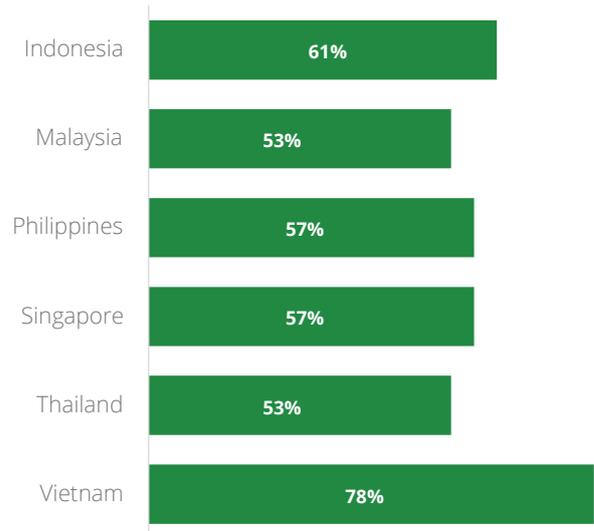


**Interest in purchasing vehicles and insurance directly from manufacturers is highest in Vietnam, while comparatively lower levels of interest are observed in Singapore and Malaysia. The results indicate significant cross-market variation in consumer openness to agency-style, direct-to-consumer models.**

**Percentage of surveyed consumers who would be interested in purchasing insurance directly from the manufacturer (% somewhat/very interested)**



**Percentage of surveyed consumers who would be interested in acquiring vehicle directly from the manufacturer (% somewhat/very interested)**



Q39. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q40. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?

Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

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03

Connectivity



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**Survey respondents are most willing to pay for safety and security features such as emergency assistance and anti-theft tracking, and vehicle health-related features, eclipsing other convenience-oriented options**

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

Connected vehicle services	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Automatic detection of vehicles and pedestrians	76%	71%	76%	61%	69%	82%
Emergency assistance (e.g., collision detection)	85%	79%	87%	70%	80%	89%
Anti-theft tracking	90%	81%	87%	66%	84%	85%
Warranty/recall notices	75%	74%	79%	63%	63%	75%
App connectivity	75%	61%	72%	55%	67%	81%
Autonomous/remote parking	70%	57%	61%	52%	64%	75%
Infotainment functions (e.g., navigation, video streaming, etc.)	72%	62%	69%	55%	65%	75%
Vehicle health reporting and maintenance cost forecasts	81%	66%	79%	60%	73%	84%
Optimised vehicle insurance plan based on your driving habits	75%	64%	72%	58%	74%	78%
Digital key (e.g., using a smartphone to unlock/start vehicle)	74%	62%	65%	53%	67%	82%

Q52. To what extent would you be willing to pay extra for each of the following connected vehicle services?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

 Most commonly cited

**Consumers surveyed are concerned about sharing connected-vehicle data, including information from synced devices, in-cabin cameras, and vehicle location, highlighting growing sensitivities around privacy and the handling of personally identifiable data.**

**Level of concern regarding data-sharing (% somewhat/very concerned)**

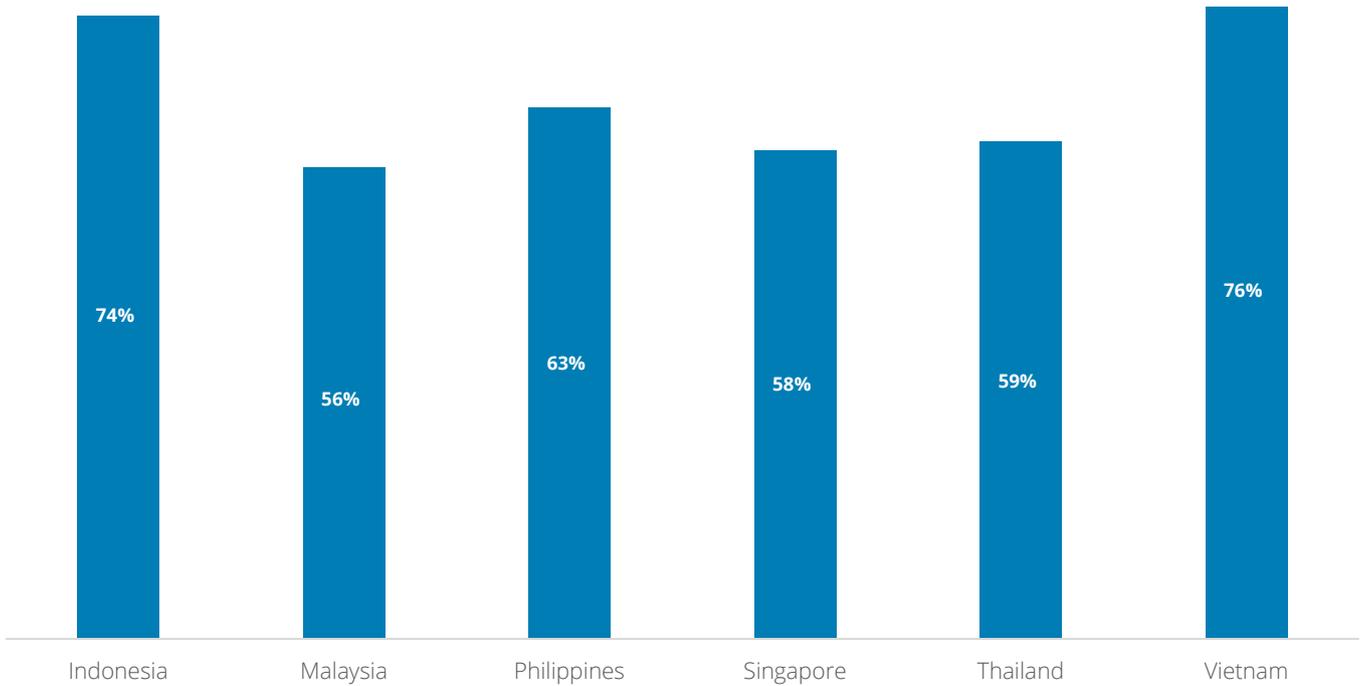
Connected vehicle data	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Sensor data related to vehicle status (e.g., brake fluid level)	44%	61%	62%	53%	25%	43%
Data related to driving behaviour (e.g., braking, acceleration, speed)	43%	61%	65%	56%	30%	50%
Data related to vehicle location (e.g., historic and real-time)	51%	70%	70%	64%	32%	53%
Biometric data collected by sensors in the cockpit (e.g., your heart rate)	45%	61%	66%	65%	28%	52%
Data related to the use of connected services (e.g., smartphone apps)	52%	68%	71%	67%	32%	50%
Data synced from connected devices (e.g., contacts, call logs, messages)	61%	67%	72%	70%	36%	58%
Data from in-cabin cameras (e.g., driver monitoring, eye-tracking, child presence detection)	50%	70%	73%	66%	32%	52%

Q53. As vehicles become more and more connected to the internet, how concerned would you be if the following types of data were shared with your vehicle manufacturer, dealer, insurance company, and/or other third parties?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

 Most commonly cited

Voice command support in local languages is relatively more important in Vietnam and Indonesia markets, while interest is significantly lower in Malaysia, Singapore, and Thailand, signalling cross-market variation in digital engagement expectations.

Importance of next vehicle to support voice commands in local languages (% somewhat/very important)



Q54. How important is it for your next vehicle to support voice commands in local languages?  
Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]





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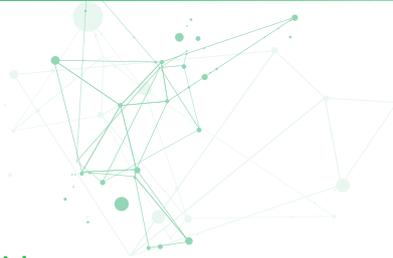
# 04

## Software-defined vehicles

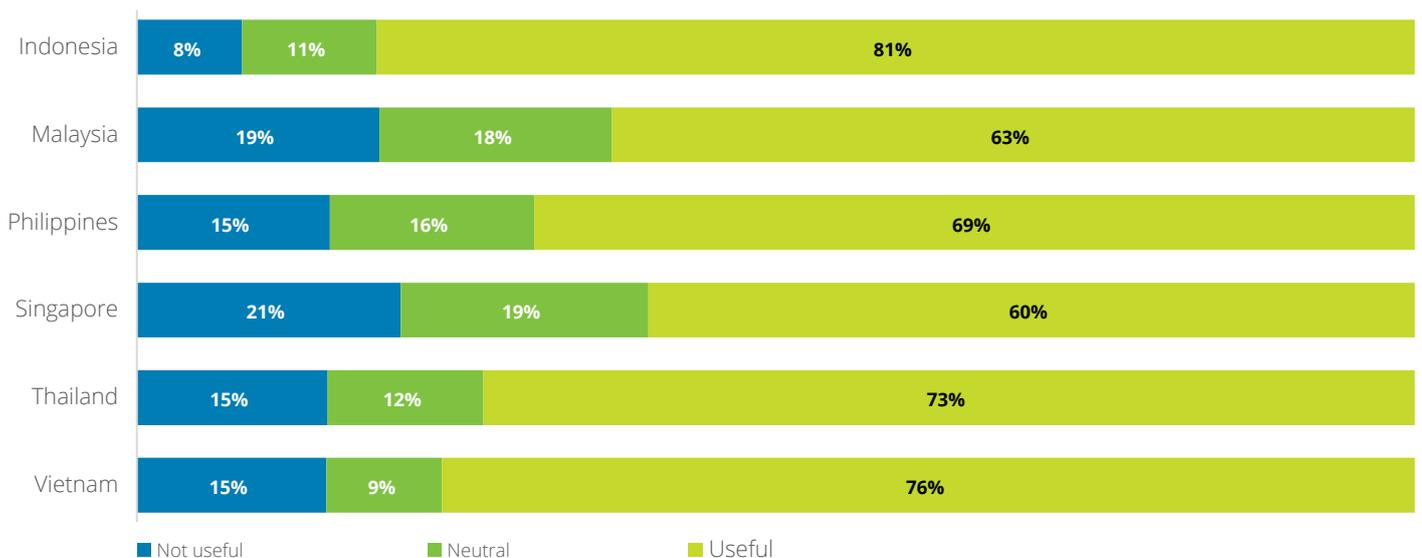
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The perceived usefulness of software-defined vehicles is relatively higher in Indonesia, while enthusiasm is notably lower in Singapore, highlighting a clear divide in comfort with software-centric vehicle concepts.



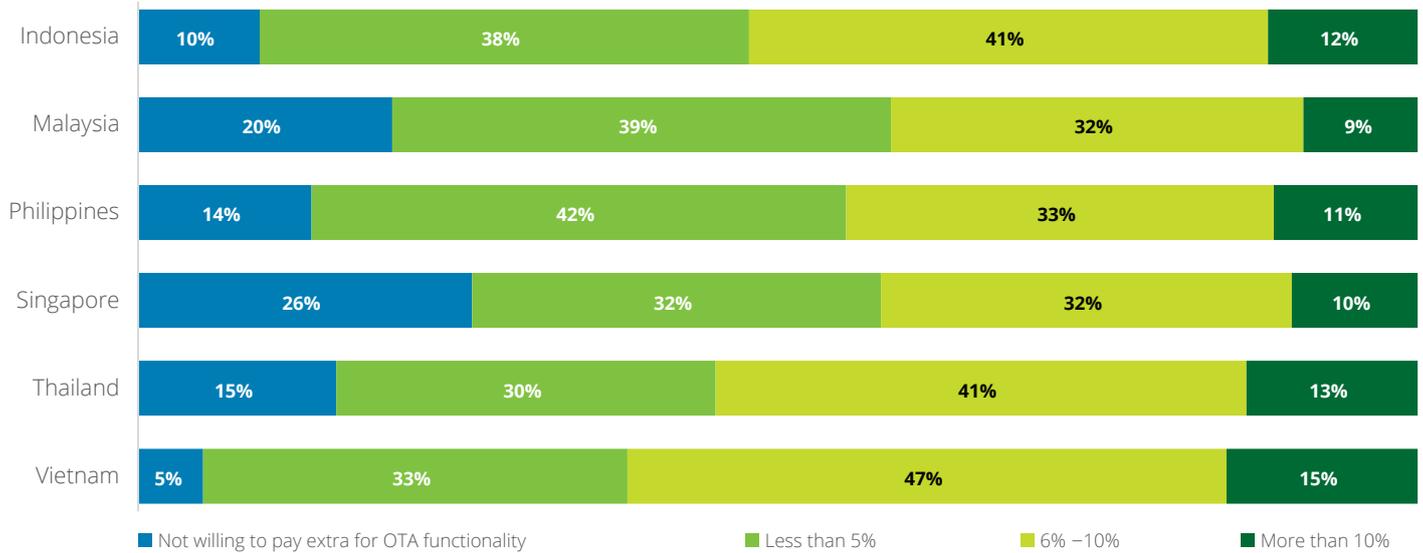
Perceived usefulness of software-defined vehicles



Note: "Not useful" is the sum of not at all useful, slightly useful, and somewhat useful while "useful" is the sum of useful, very useful, and extremely useful.  
 Q55. Software-defined vehicles allow customisation and feature expansion not only before purchase, but throughout the vehicle's life cycle. How useful do you find the idea of your next vehicle being primarily software-defined?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

**Willingness to pay extra for over-the-air (OTA) update capability is highest in Vietnam, while consumers surveyed in Singapore and Malaysia are less inclined to pay, suggesting that in a few markets, OTAs may be viewed as an expected baseline feature rather than something worth paying a premium to access.**

**Willingness to pay above vehicle list price for OTA update capability**



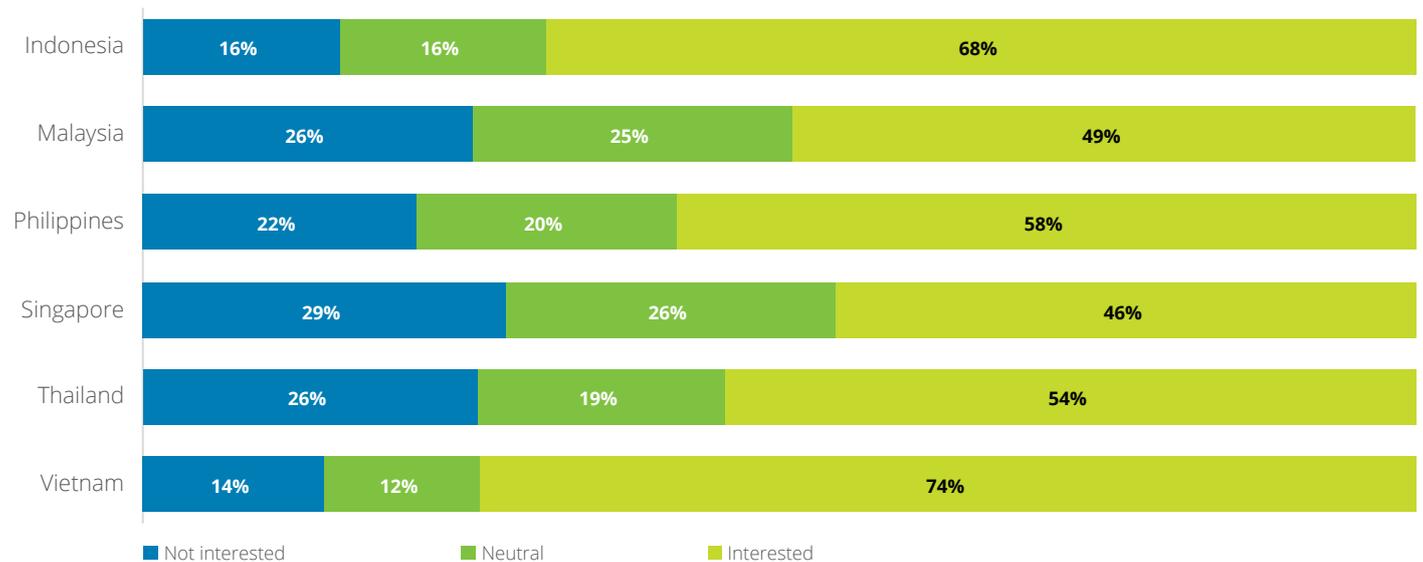
Note: Percentages may not add up to 100 due to rounding.

Q56. Over-the-air (OTA) software updates downloaded directly to a vehicle can eliminate the need for workshop visits. How much more would you be willing to pay for a vehicle that includes automated OTA updates versus a traditional vehicle requiring workshop visits? Please indicate the amount as a percentage above the vehicle's list price.

Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

**Interest in vehicle-based integrated services is strongest in Vietnam, while consumers surveyed in Singapore are more cautious, suggesting varying levels of openness to expanding the vehicle's role within a broader service ecosystem.**

**Consumer interest in using vehicles as platforms for integrated services**



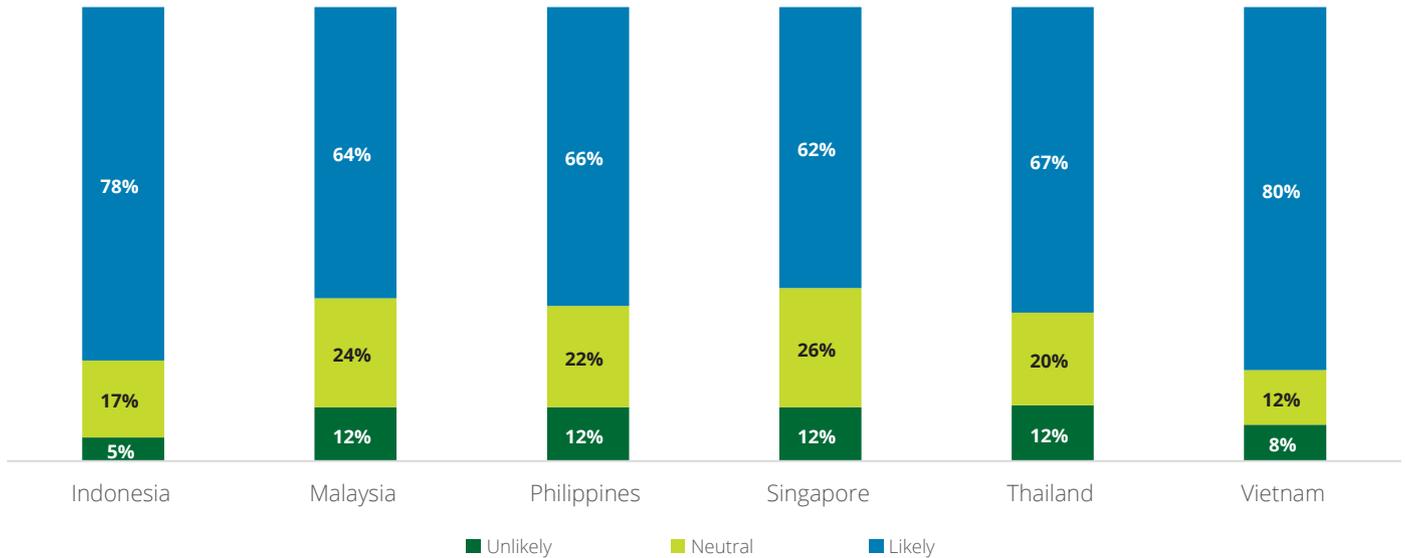
Note: Percentages may not add up to 100 due to rounding; "Not interested" is the sum of not at all interested, slightly interested, and somewhat interested, while "Interested" is the sum of interested, very interested, and extremely interested.

Q57. Software-defined vehicles can serve as platforms for services such as package delivery, grocery drop-off, valet parking, dynamic insurance pricing, or on-demand autonomous rides. How interested are you in using your vehicle to access such integrated services?

Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

Many consumers surveyed in the SEA markets expressed a willingness to use AI-enabled customisation features that automatically adjust in-vehicle settings, suggesting a growing level of comfort with vehicles that can recognise preferences and adapt without manual input to enhance convenience and personalisation.

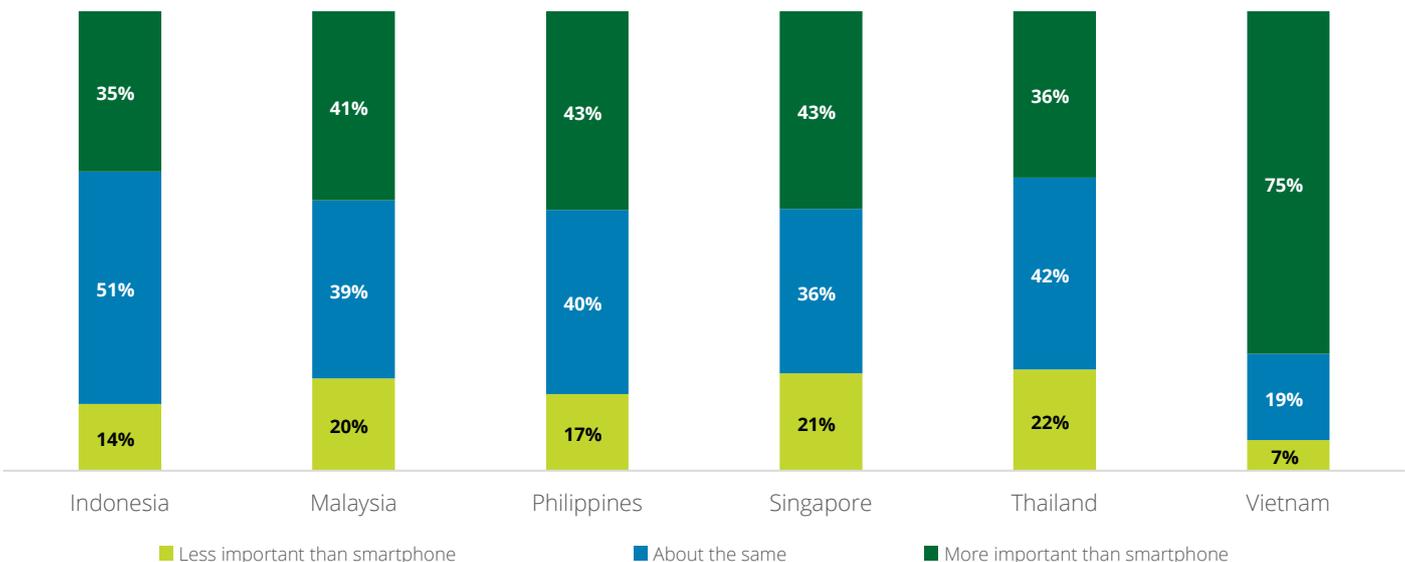
Likelihood of using AI-enabled vehicle customisation features



Note: Percentages may not add up to 100 due to rounding; “Unlikely” is the sum of very unlikely, unlikely, and slightly unlikely, while “Likely” is the sum of slightly likely, likely, and very likely. Q60. AI-enabled customisation allows your vehicle to recognise and adapt to your preferences without manual input (e.g., adjusting climate settings, seat positions, cabin lighting). How likely would you be to use such AI-enabled features in your next vehicle? Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

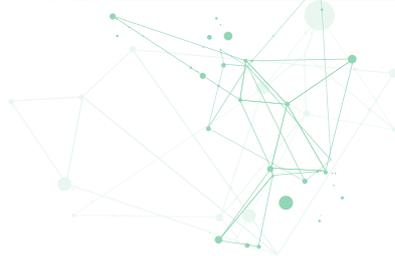
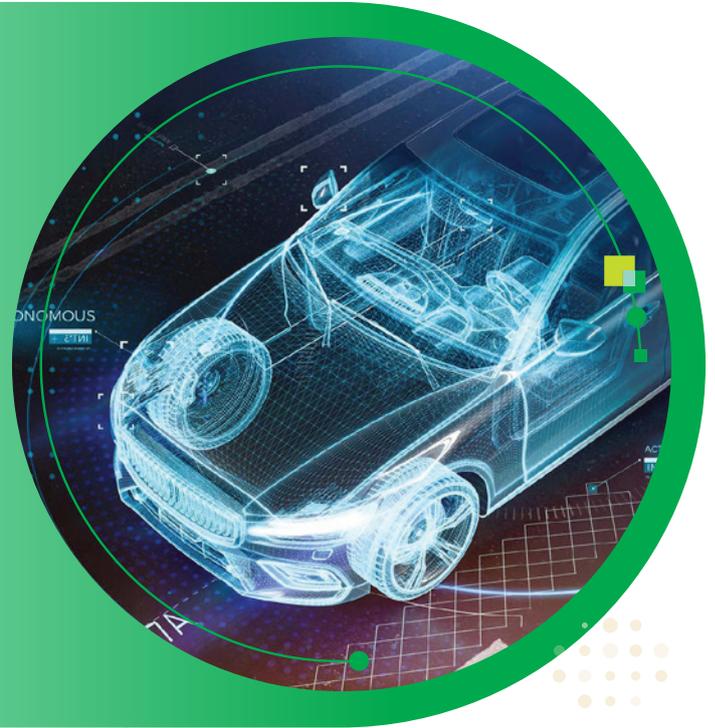
Most survey respondents still view their smartphone as their main digital device, but in markets like Vietnam, many now consider the in-vehicle ecosystem more important, reflecting rising expectations for stronger digital experiences inside the car.

Perceived importance of in-vehicle ecosystems compared with smartphones

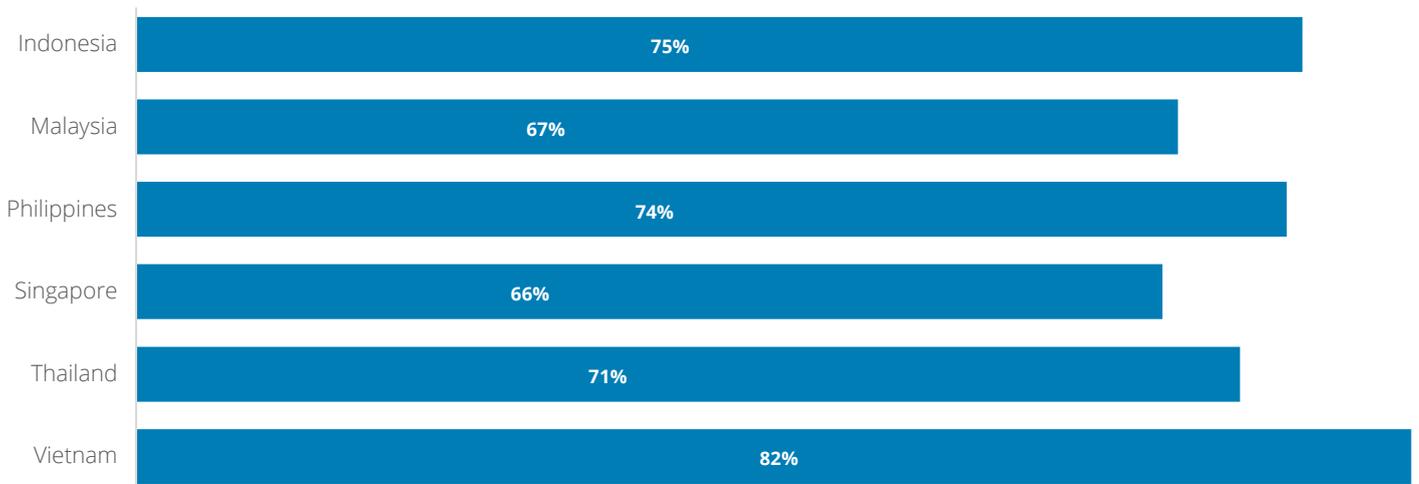


Note: Percentages may not add up to 100 due to rounding; “Less important” is the sum of much less important, less important, and slightly less important, while “more important” is the sum of slightly more important, more important, and much more important. Q61. If an in-vehicle ecosystem offered features like advanced driving assistance, additional comfort functions, or integrated third-party services (e.g., insurance, repair shops), how would you compare its importance to that of your smartphone? Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

Many consumers surveyed say they would likely keep their vehicle longer if it received regular OTA updates that add new features, safety enhancements, or performance improvements, suggesting that continuous software upgrades can play a meaningful role in extending vehicle ownership.



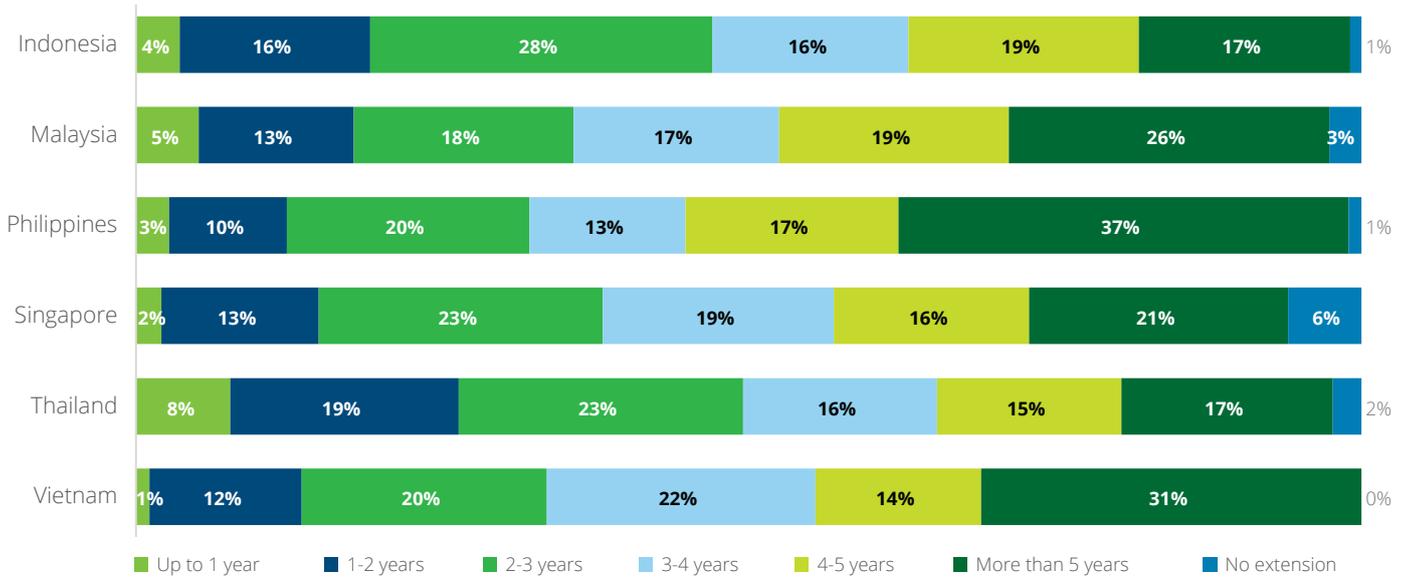
**Likelihood of keeping a vehicle longer if regular OTA updates enhance the mobility experience**



Note: Likelihood percentage is the sum of slightly likely, likely, and very likely.  
 Q62. How likely would you be to keep a vehicle longer if it received regular OTA updates to help enhance your mobility experience (e.g., new features, safety improvements, performance enhancements)?  
 Sample size: n= 863 [Indonesia]; 906 [Malaysia]; 907 [Philippines]; 732 [Singapore]; 904 [Thailand]; 884 [Vietnam]

Many consumers surveyed would keep their vehicles one to three years longer with regular OTA updates, with a notable share in several markets open to even longer ownership extensions. This opens the door for OEMs to strengthen brand loyalty through frequent digital engagement, grow their software-based revenue, and reduce their reliance on hardware redesigns.

Number of additional years consumers would keep their vehicle with OTA enhancements



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

Q63. How many additional years would you expect to extend your ownership of the vehicle?

Sample size: n= 644 [Indonesia]; 608 [Malaysia]; 667 [Philippines]; 483 [Singapore]; 638 [Thailand]; 725 [Vietnam]

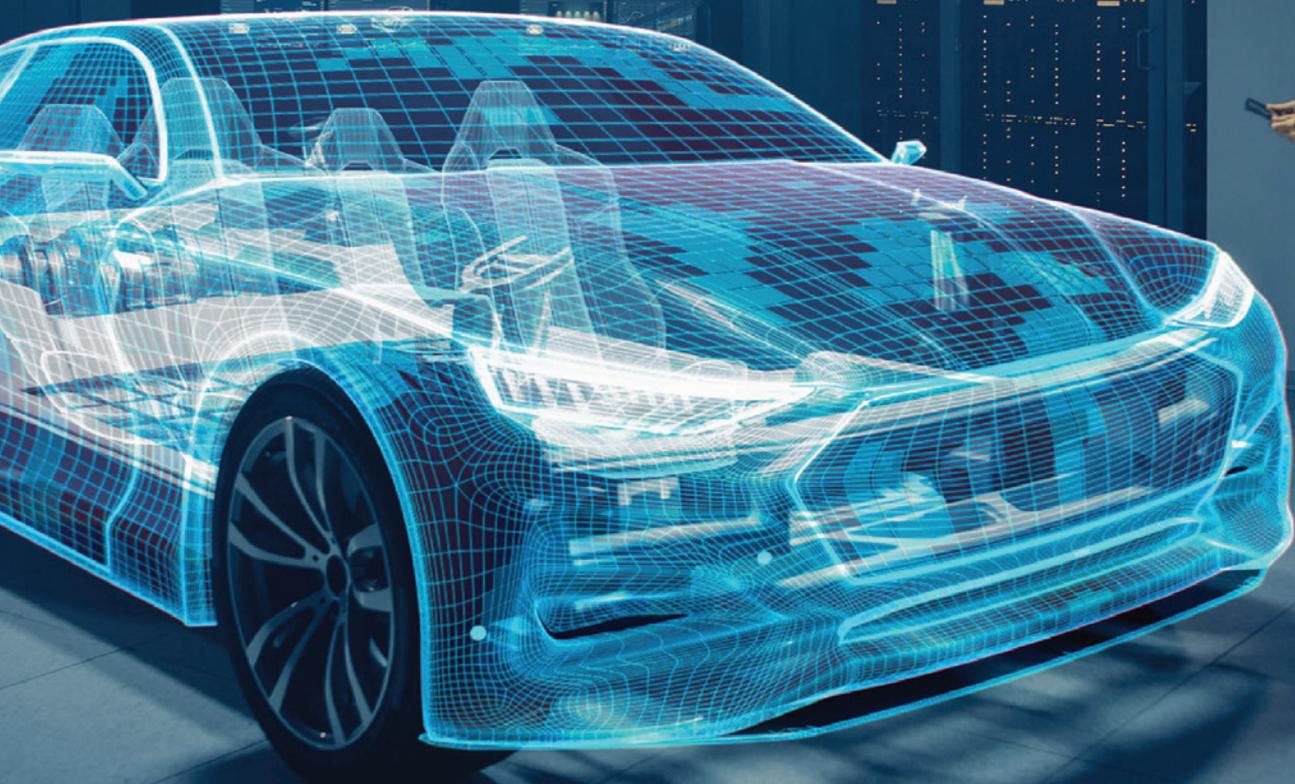


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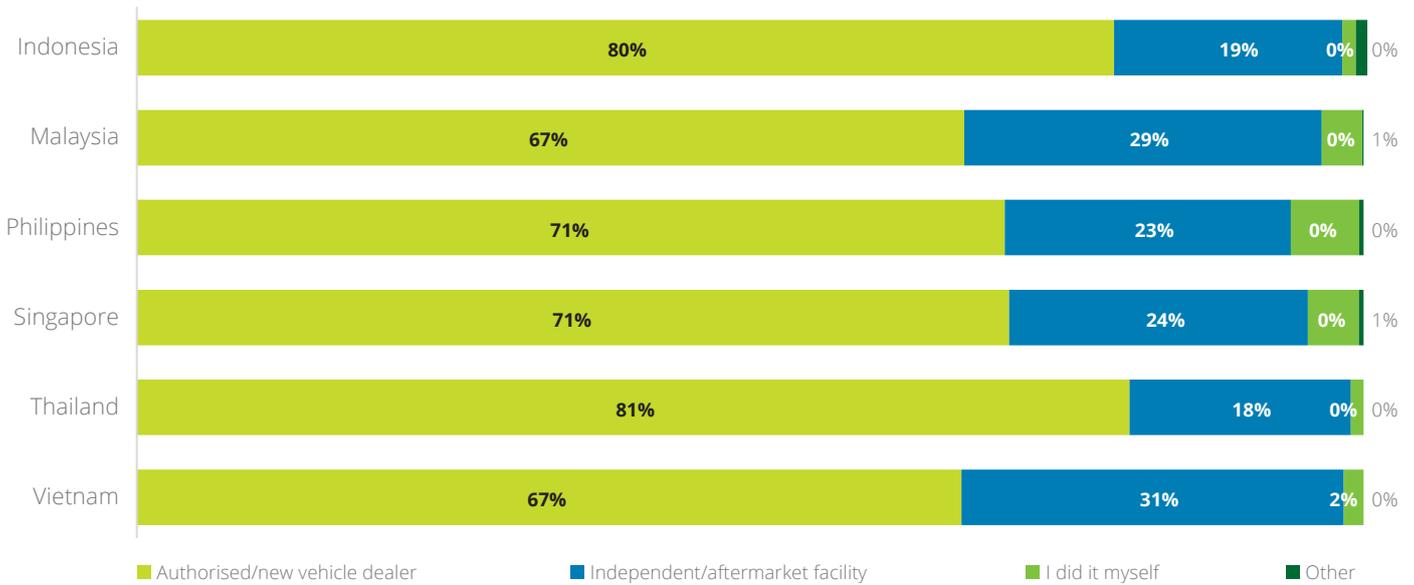
# Vehicle servicing

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**Most consumers surveyed report having their most recent vehicle service event at an authorised dealer, though a sizable number of people rely on aftermarket providers in Malaysia and Vietnam, perhaps reflecting a desire to maximise the value of the work performed.**

**Most recent vehicle service experience by type of facility**



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

Q16. Where was your most recent vehicle service experience?

Sample size: n= 629 [Indonesia]; 820 [Malaysia]; 540 [Philippines]; 526 [Singapore]; 681 [Thailand]; 674 [Vietnam]

**Surveyed consumers primarily choose vehicle service providers based on the quality of work performed, which can build trust and lead to increased loyalty and advocacy behaviours over time.**

**Most important reason for choosing a vehicle service provider**

Reason to choose a service provider	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Cost	7%	15%	8%	16%	5%	7%
Trust	21%	12%	18%	14%	25%	18%
Convenience (e.g., location, hours)	12%	11%	15%	11%	13%	11%
Quality of work	23%	25%	27%	23%	24%	35%
Customer experience	14%	8%	8%	9%	9%	7%
Personal relationship with mechanic/ technician	3%	6%	7%	6%	3%	7%
Warranty coverage	18%	21%	13%	16%	19%	9%
Complexity of work required	2%	2%	3%	5%	1%	6%

Note: Other % not shown.

Q17. What is the most important reason for your preferred choice of vehicle service provider?

Sample size: n= 618 [Indonesia]; 792 [Malaysia]; 508 [Philippines]; 502 [Singapore]; 674 [Thailand]; 663 [Vietnam]

Most commonly cited

**Transparency around pricing and the work performed consistently ranks as the most important aspect of the vehicle service experience, highlighting consumers' strong desire for clear, fair, and well-explained servicing outcomes.**



**Most important aspect of a vehicle service experience**

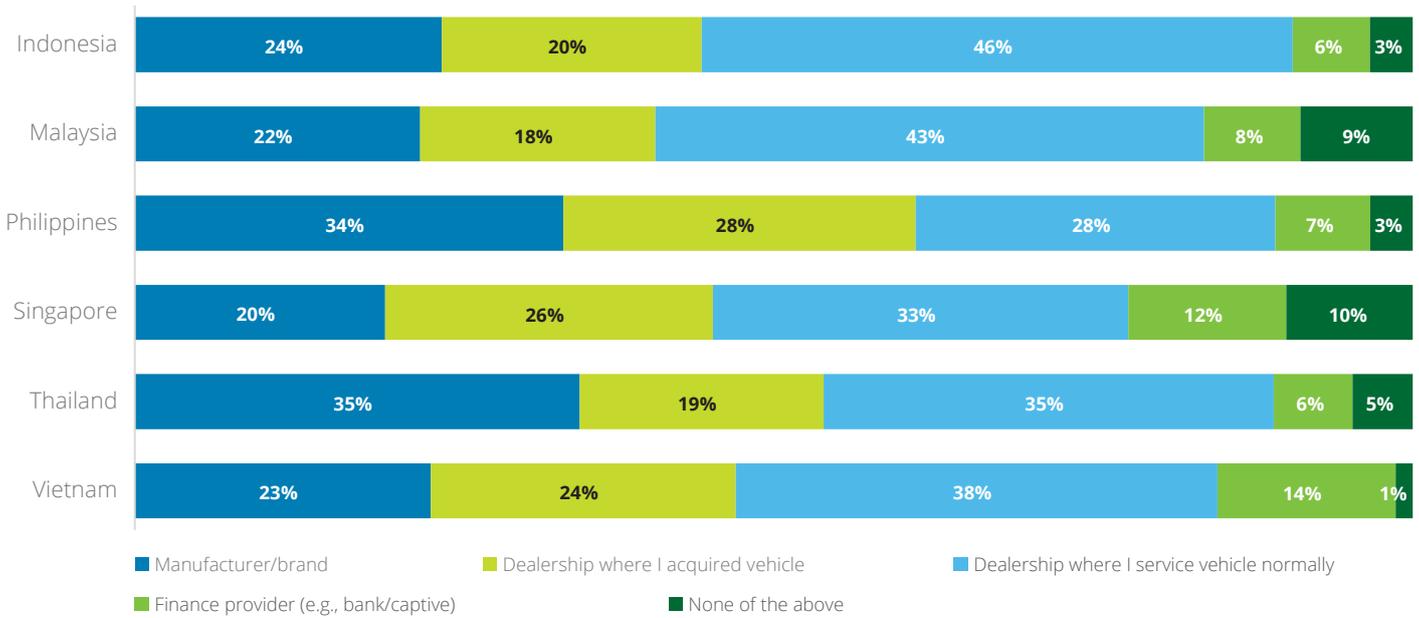
Important aspect of vehicle service experience	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
Customer service/treatment	28%	13%	16%	9%	15%	26%
Communication while the vehicle is being serviced	4%	5%	6%	6%	5%	4%
Explanation of service work performed	11%	14%	11%	10%	9%	10%
Cost/price	8%	15%	12%	21%	12%	10%
Transparency of pricing and work performed	32%	27%	32%	23%	27%	19%
Convenient location	5%	7%	5%	7%	6%	4%
Availability of appointment	0%	3%	4%	3%	3%	4%
Online booking tool	0%	1%	0.2%	3%	3%	1%
Speed of service	8%	8%	6%	9%	11%	6%
Efficiency of check-in/check-out process	3%	5%	8%	7%	7%	9%
Access to temporary/loaner vehicle	1%	1%	2%	2%	2%	7%

Q21. What is the most important aspect of a vehicle service experience?  
 Sample size: n= 618 [Indonesia]; 792 [Malaysia]; 508 [Philippines]; 502 [Singapore]; 674 [Thailand]; 663 [Vietnam]

 Most commonly cited

Surveyed consumers in most SEA markets place the highest trust in the dealership where they regularly service their vehicle, rather than the manufacturer or the selling dealership, underscoring the influence of ongoing service interactions in shaping long-term customer relationships.

Who do vehicle owners most trust?



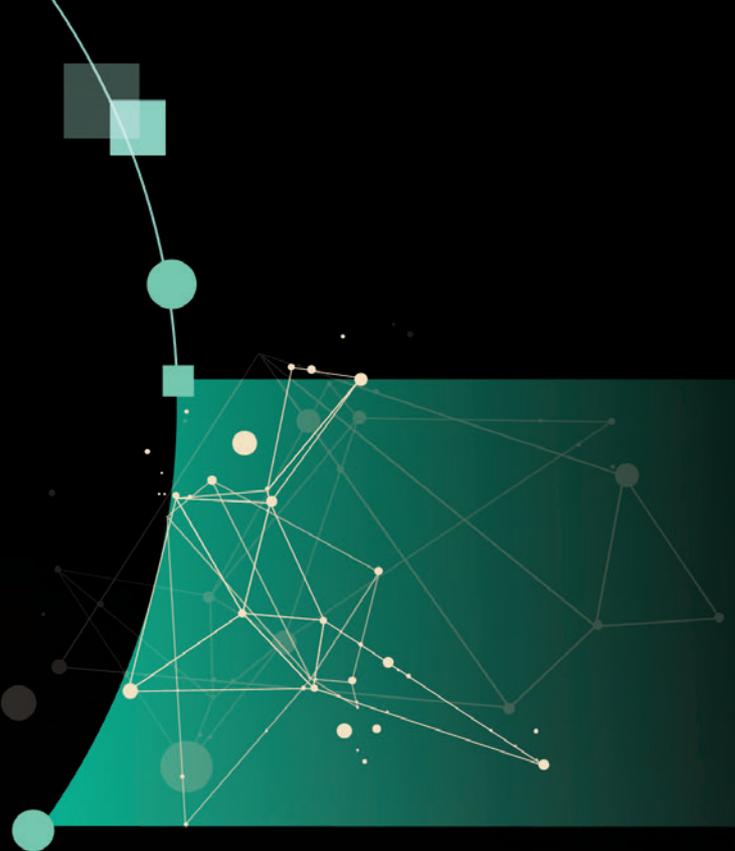
Note: Percentages may not add up to 100 due to rounding.  
 Q22. With whom do you have the most trusted relationship?  
 Sample size: n= 629 [Indonesia]; 820 [Malaysia]; 540 [Philippines]; 526 [Singapore]; 681 [Thailand]; 674 [Vietnam]



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Study overview



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# About the study

The 2026 study includes 28,553 consumer responses from 27 geographies.

Americas	Sample	EMEA	Sample	Asia-Pacific	Sample
Argentina (AR)	1,004	Austria (AT)	1,000	Australia (AU)	1,002
Brazil (BR)	1,000	Belgium (BE)	1,004	China (CN)	1,000
Canada (CA)	1,001	France (FR)	1,004	India (IN)	1,501
Mexico (MX)	1,001	Germany (DE)	1,501	Indonesia (ID) - SEA	1,004
United States (US)	1,000	Italy (IT)	1,004	Japan (JP)	1,004
		Netherlands (NL)	1,002	Malaysia (MY) - SEA	1,002
		Saudi Arabia (SA)	1,001	Philippines (PH) - SEA	1,000
		Spain (ES)	1,003	South Korea (KR)	1,000
		Turkey (TR)	1,000	Singapore (SG) - SEA	1,000
		United Arab Emirates (AE)	1,006	Thailand (TH) - SEA	1,007
		United Kingdom (UK)	1,502	Vietnam (VN) - SEA	1,000

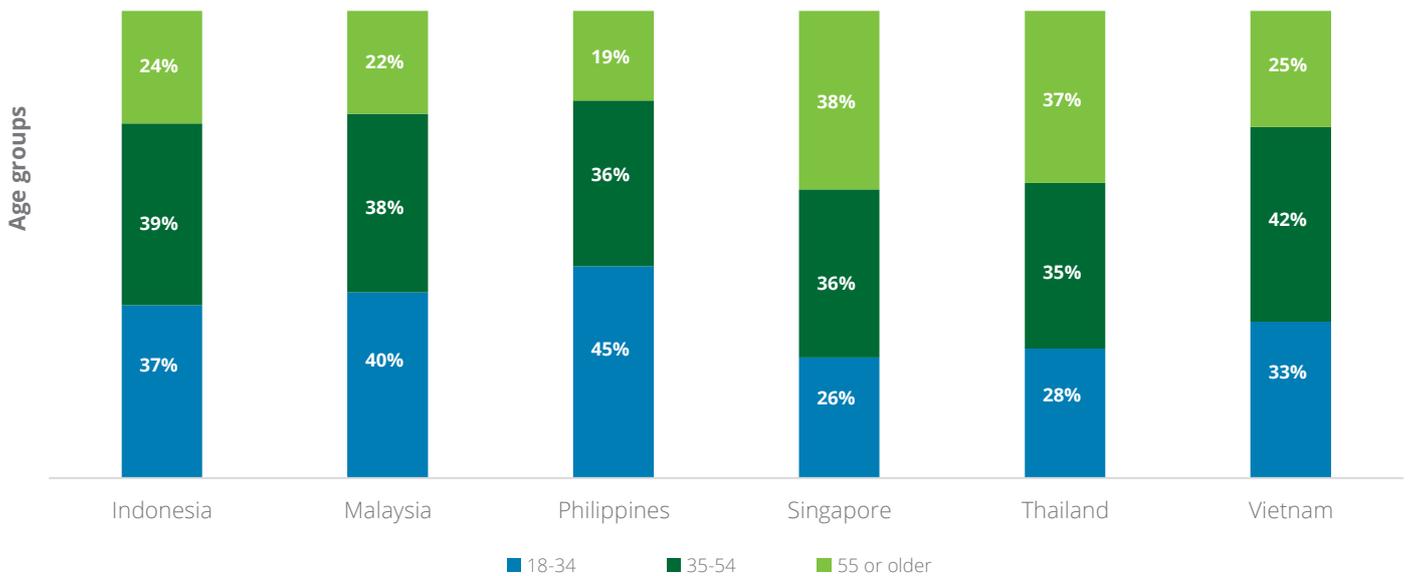
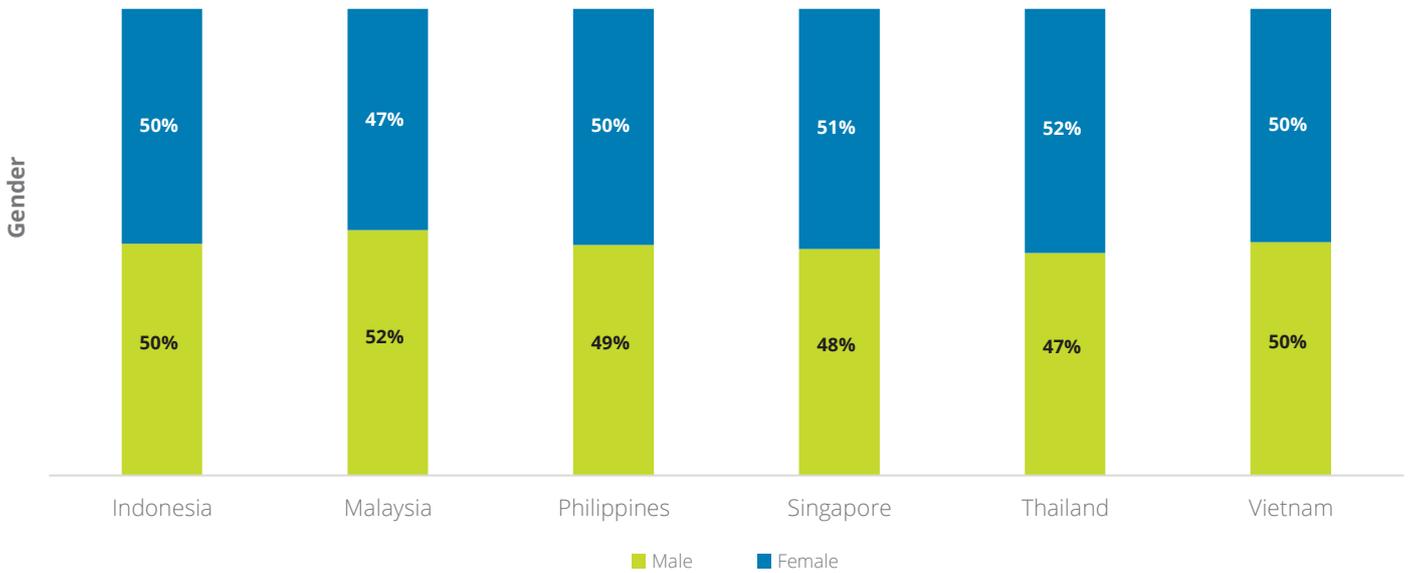
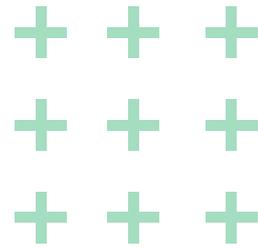


## Study methodology

The study was fielded from October through November 2025 using an online panel methodology where consumers of driving age were invited to complete the questionnaire (translated into local languages) via email.

Note: "Sample" represents the number of survey respondents in each geography.

# Study demographics



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

Note: Nonbinary/Nongender-confirming/Prefer not to answer percentages were less than 1%

Sample size: n= 1,004 [Indonesia]; 1,002 [Malaysia]; 1,000 [Philippines]; 1,000 [Singapore]; 1,007 [Thailand]; 1,000 [Vietnam]



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