

CASE STUDIES

ASEAN EV STUDY



Overview

This study is a qualitative research project designed to explore Thai consumers' attitudes, ownership experiences, and future purchase intentions toward electric vehicles (EVs). The research focuses on both current EV owners and near-term EV intenders through Mini Group Discussions (MGD) and Home Visits (HV)

Objectives

- To understand first-time EV ownership experiences in Thailand.
- To explore key motivations for choosing EVs over ICE, HEV, and PHEV vehicles.
- To analyze charging behavior and home charging readiness.
- To study consumer consideration sets and brand comparison behavior when purchasing EVs.
- To assess future purchase intentions, including replacement vs. additional vehicle demand.

Research Result

- Most respondents are first-time EV owners, showing that the Thai EV market is still in an early adoption stage.
- Purchase motivation centers on cost efficiency, new technology, and environmental benefits, compared with traditional ICE vehicles.
- Home charging availability plays a critical role in EV adoption, with strong attention to parking type and private charger installation.
- EV buyers demonstrate strong comparison behavior across multiple brands, especially among Chinese and Korean EV models.
- In terms of future purchase, both replacement and additional vehicle demand exist, reflecting growing household multi-car ownership.
- Consumers remain open to hybrid and plug-in hybrid options, indicating EV adoption is still part of a broader powertrain transition phase.

Background

Thailand's EV market is undergoing rapid growth driven by government policies, infrastructure development, and increased consumer awareness of sustainability and fuel cost savings. As more first-time EV buyers enter the market, understanding their ownership experience, charging behavior, and purchase motivations is essential for automotive brands to refine product positioning and market strategies

Methodology

Research Type: Qualitative (MGD & Home Visit Interviews)

Target Respondents:

- Current EV Owners (various brands such as Kia, BYD, MG, Neta, etc.)
- EV Intenders planning to purchase within 6 months

Sample Design:

- MGD: 2 Groups (EV Owners & EV Intenders)
- HV: 2 Individual EV Owners

Key Screening Criteria:

- Must own a new car for personal use
- Must be primary driver
- EV owners must be first-time EV buyers
- Must have compared multiple EV models before purchase

Key Data Areas Collected:

- Vehicle ownership details (brand, model, powertrain, price)
- Charging environment and parking conditions
- Usage behavior (weekday/weekend)
- Household composition and demographics
- Future purchase intent, budget, and powertrain preferences