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VIETNAM AUTOMOTIVE CUSTOMER SATISFACTION REPORT

Usage & Attitudes Study

Understanding consumer experience across sales and service touchpoints

2025 Apr

InsightAsia

Table of Content

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Introduction & Methodology

Introduction

This study provides a comprehensive analysis of customer satisfaction in Vietnam's automotive market, focusing on both sales and after-sales service experiences. The research covers key touchpoints in the customer journey to identify specific drivers of satisfaction and areas for improvement.

Objectives

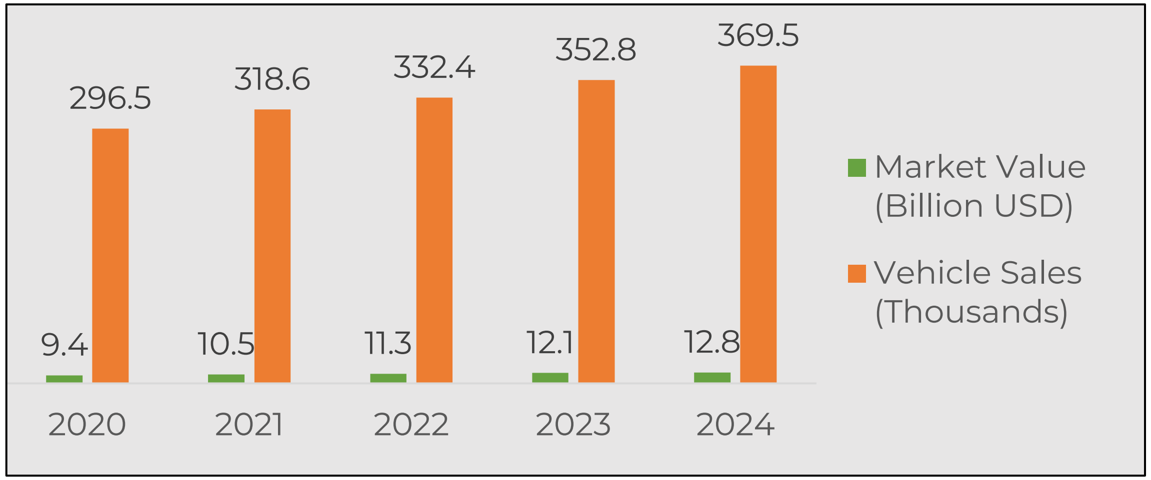
- Assess overall satisfaction with vehicle purchase experience across all touchpoints
- Measure satisfaction with vehicle maintenance and repair services
- Identify pain points and expectations in the customer journey
- Evaluate loyalty drivers and barriers by brand and segment
- Compare brand performance across key metrics
- Understand the impact of emerging trends on customer experience

Fieldwork Details

- **Sample size:** 762 respondents.
- **Demographics:** M/F 22-65, owners of new vehicles within past 36 months.
- **Geography:** Hanoi, HCMC, Da Nang, Can Tho, Hai Phong.
- **Methodology:**
  - Quantitative F2F survey (n=762).
  - In-depth interviews (n=11).
  - Mystery shopping assessments (n=13 dealerships).
  - Accompanied service visits (n=6).
- **Fieldwork period:** December 2024 – March 2025.
- **Brands covered:** TOYOTA, HONDA, MITSUBISHI MOTORS, mazda, SUZUKI, Ford, HYUNDAI, KIA, VINFAST

Market Context

New Passenger Vehicle Market Size (2020-2024)



Sources: *Vietnam Automobile Manufacturers Association (VAMA), Vietnam Motor Show Association (VMSA), Ministry of Industry and Trade statistics, primary research with industry experts*

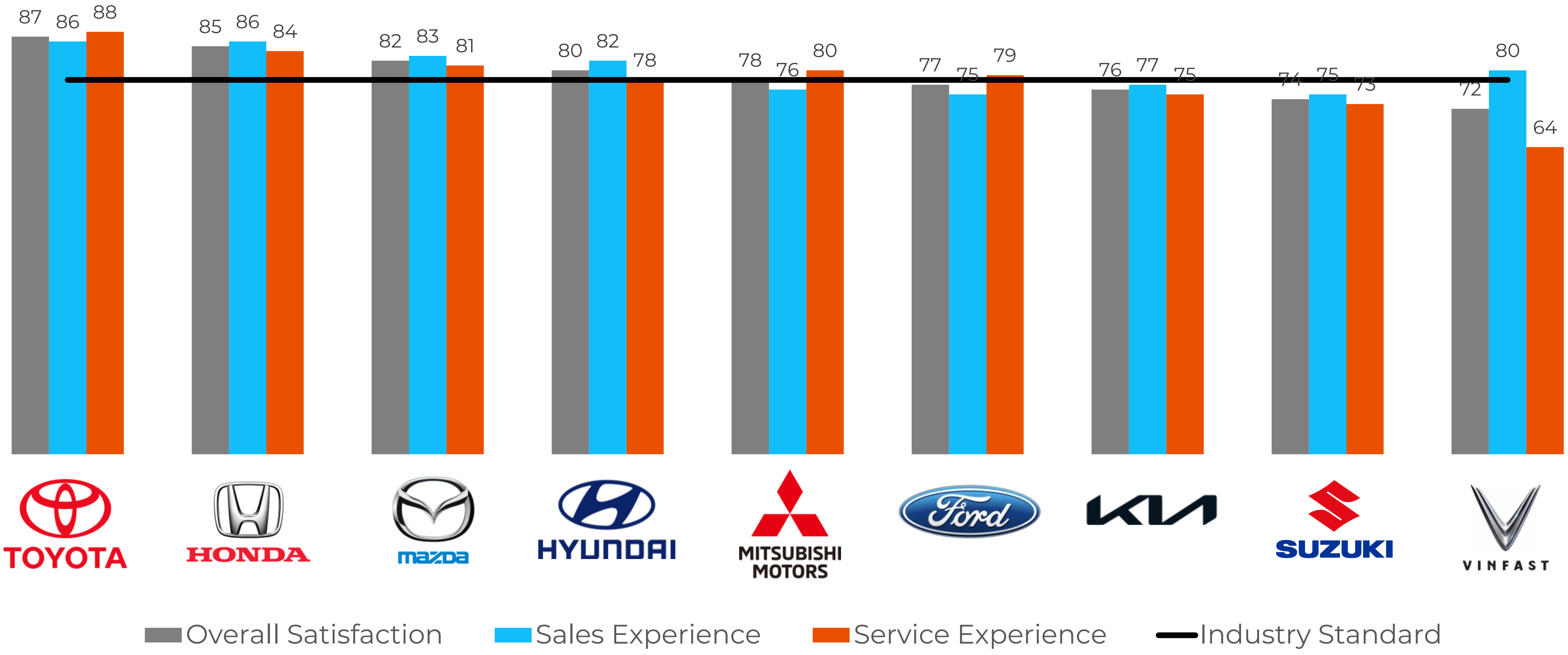
Key Market Trends

- Vietnam's passenger vehicle market valued at **$12.8 billion** in 2024.
- Approximately **369,500 new vehicles** sold in 2024.
- **4.7% annual growth** rate in 2024
- Continued post-pandemic market recovery.
- Shift from price sensitivity to value-based purchasing decisions.
- Increasing importance of digital touchpoints.
- Rising customer expectations for after-sales service.
- Emergence of EVs challenging traditional models.

EXECUTIVE SUMMARY

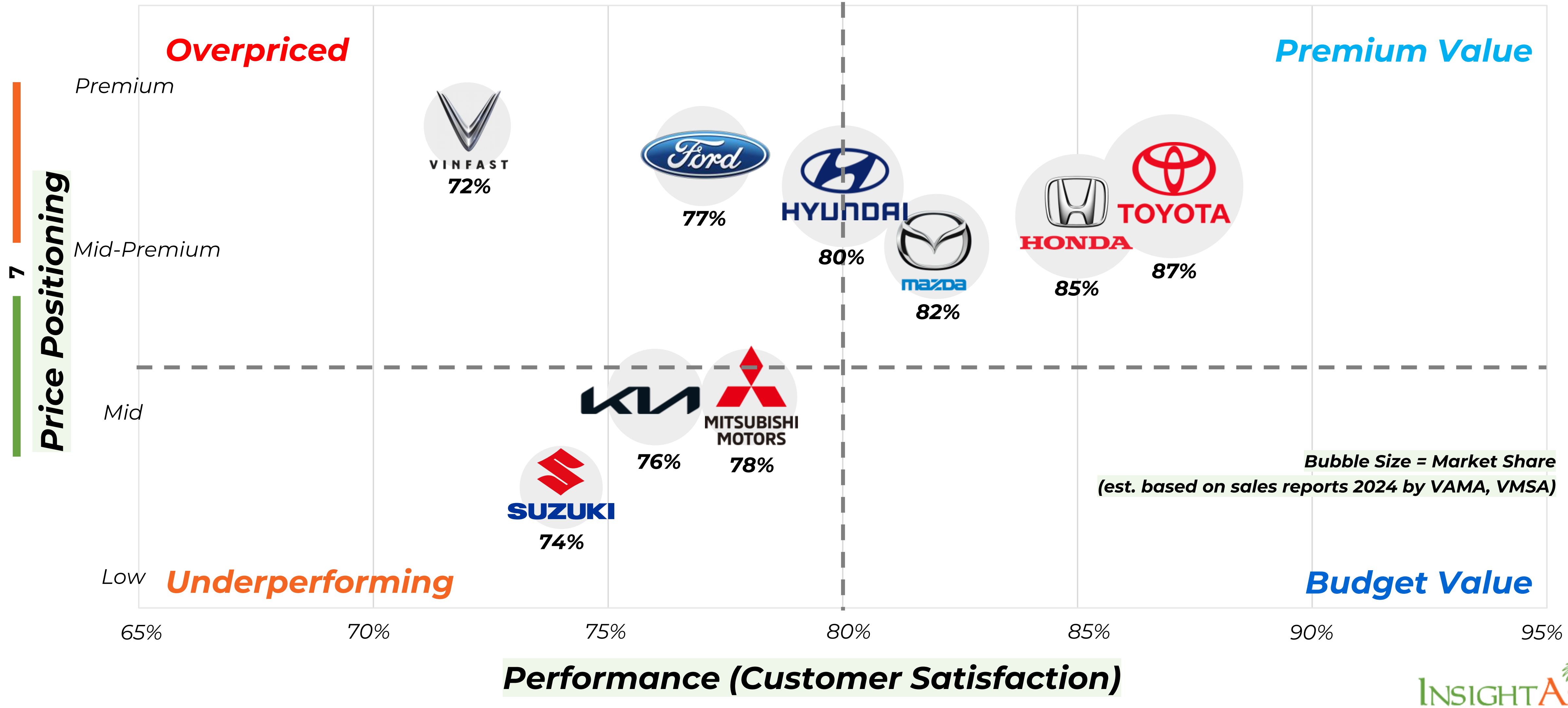
Overall Satisfaction Benchmarks

“How satisfied are you with your overall experience with [BRAND]?" (n=762)



Price-Performance Matrix

"How satisfied are you with your overall experience with [BRAND]?" (n=762)
"How would you rate the value you receive for the price paid for your vehicle?" (n=762)



Critical Performance Metrics

87%
Toyota's Overall Satisfaction (Highest)

92%
Of Buyers Research Online Before Visiting Dealerships

78%
Plan to Use Non-Authorized Service Post-Warranty

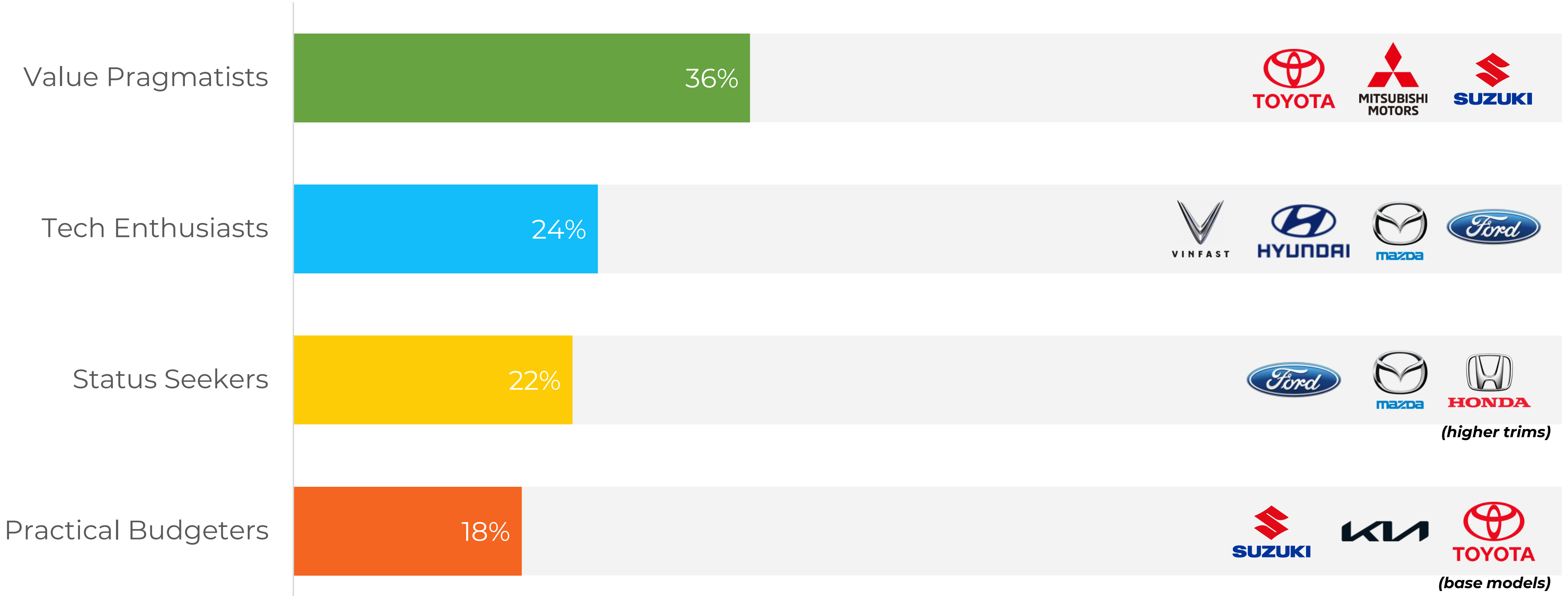
27%
Gap in Price Negotiation Satisfaction vs. Importance

20%
Gap in Price Transparency vs. Importance in Service

48%
Would Consider EV for Next Purchase

Customer Segment & Brand Alignment

Customer Segment Analysis & Brand Alignment



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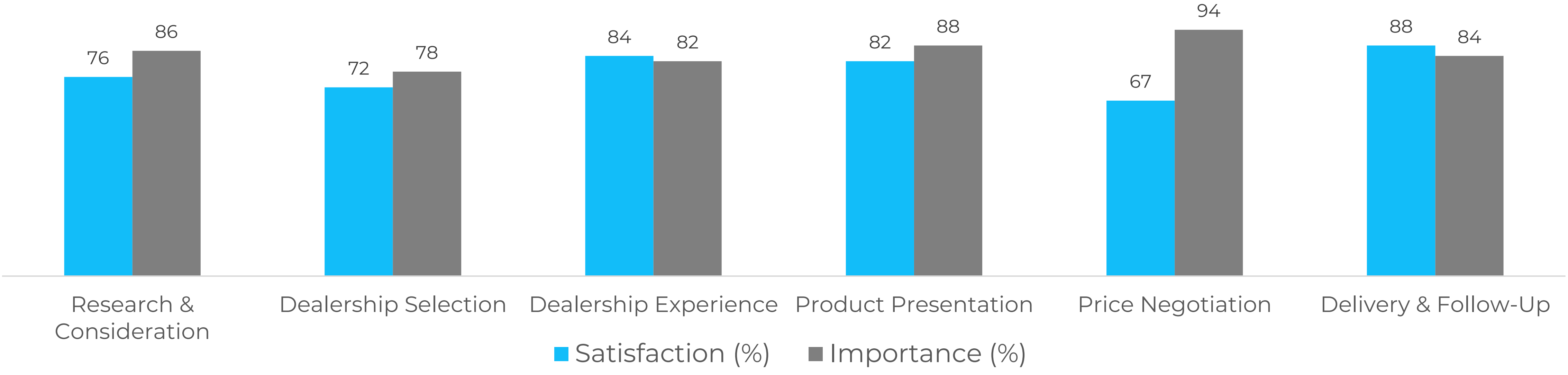
SECTION 1: SALES EXPERIENCE

Purchase Journey Stages: Satisfaction vs. Importance

"How satisfied were you with each stage of your vehicle purchase journey?" (n=762)
"How important is each stage in your overall vehicle purchase satisfaction?" (n=762)



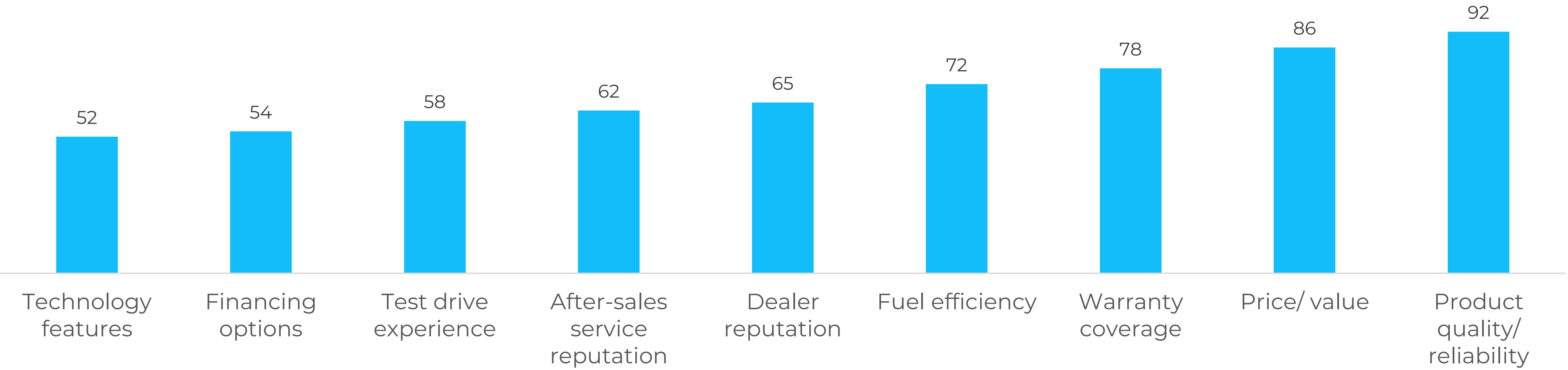
Key Insights

- The **largest gap** between importance and satisfaction occurs in the **Price Negotiation stage** (27%), representing the greatest opportunity for improvement.
- Dealership Experience and Delivery & Follow-up showed the highest satisfaction levels, indicating industry standards.

"The most frustrating aspect was getting different information from different staff members. The online sales representative quoted one price, the showroom consultant another, and the final paperwork had yet another figure. This inconsistency eroded my trust in the dealer." **(Mazda CX-5 Owner, 38, Can Tho)**

Key Purchase Drivers

"How important were the following factors in your vehicle purchase decision?" (n=762)



Segment Variation

- **Tech Enthusiasts**: Technology features (82%) and test drive experience (68%) rated much higher.
- **Value Pragmatists**: Price/ value (94%) and after-sales service reputation (72%) more important.
- **Status Seekers**: Lower emphasis on fuel efficiency (62%) compared to overall average.
- **Practical Budgeters**: Highest importance on financing options (74%) and warranty (88%).

Sales Experience Performance by Brand

"How would you rate [BRAND] on the following aspects of the sales experience?" (n=varies by brand)

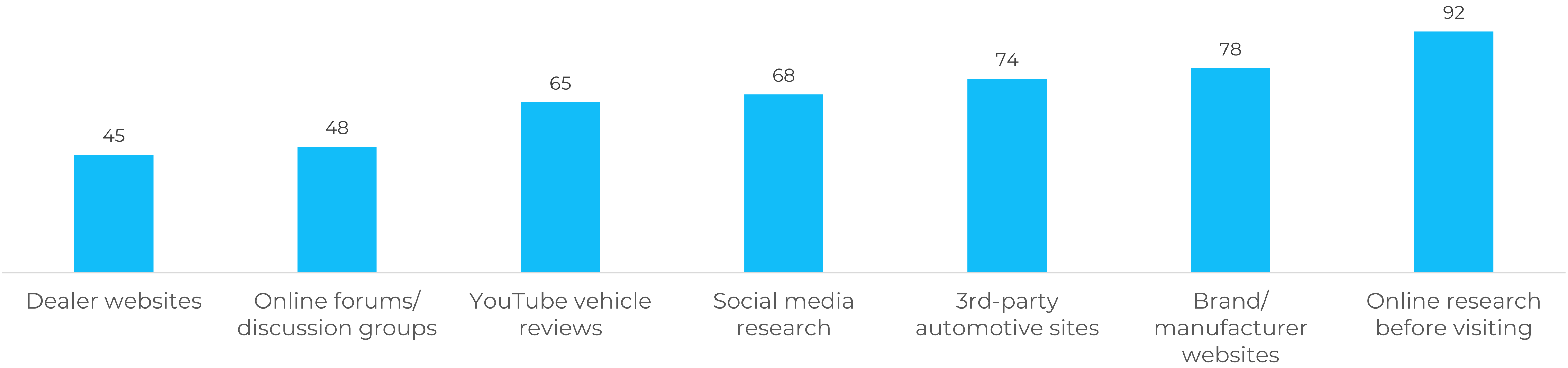
Brand	Staff Knowledge	Negotiation Transparency	Facility Quality	Process Efficiency	Digital Integration
TOYOTA	88%	72%	92%	84%	74%
HONDA	86%	74%	90%	82%	76%
MITSUBISHI MOTORS	82%	68%	85%	78%	80%
mazda	84%	70%	88%	80%	78%
Ford	80%	66%	83%	74%	72%
HYUNDAI	78%	64%	82%	76%	76%
KIA	76%	70%	80%	72%	70%
SUZUKI	74%	72%	76%	74%	68%
VINFAST	76%	82%	94%	84%	92%

Key Brand Performance Insights

- **VinFast** leads in facility quality (94%) and digital integration (92%), benefiting from their newer facilities and digital-first approach.
- **Toyota** excels in staff knowledge (88%) and facility quality (92%), while **Honda** delivers the most balanced performance across all metrics.
- **Ford** and **Hyundai** show room for improvement in negotiation transparency despite their more premium product positioning.

Digital Touchpoint Usage in Purchase Journey

"Which of the following sources did you use when researching your vehicle purchase?" (n=762)



Research Journey Insight

- The digital-first research journey is now firmly established, with 92% of buyers conducting online research before visiting a dealership. Manufacturer websites play a critical role, but third-party sites and social media are increasingly influential in shaping consumer perceptions

"I spent almost two months researching online before I even stepped into a dealership. I had already narrowed down to three models based on reviews, specifications, and YouTube videos comparing features." **(Honda CR-V Owner, 37, Ho Chi Minh City)**

Digital-to-Physical Customer Journey

1

1. Online Research

Initial research phase across manufacturer and third-party sites

92%

2

2. Brand Shortlisting

Narrowing options based on preferences and reviews

88%

3

3. Configuration

Exploring features, options and pricing

75%

4

4. Dealership Contact

Initiating contact with dealers for test drives

58%

5

5. Purchase

Final negotiation and transaction

22%

78%
Customers who report digital research directly influenced their brand perception

65%
Use YouTube vehicle reviews as part of research process

74%
Access third-party automotive review sites

16%
Higher conversion for brands with integrated digital-to-showroom experiences

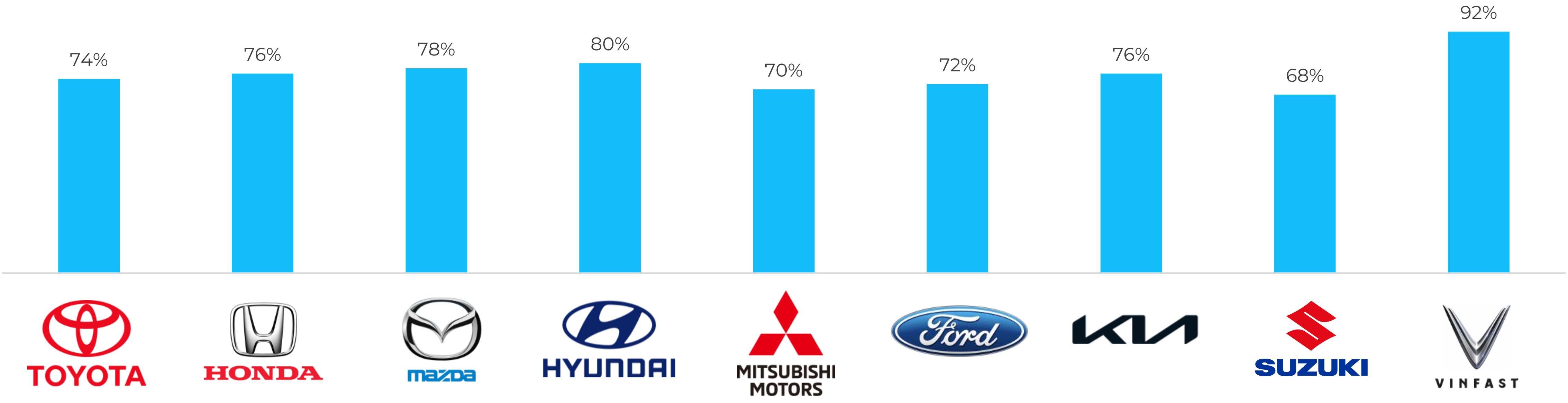
32%
Customers using online booking for dealer appointments

86%
Satisfaction rate for digital appointment scheduling vs. 72% for phone

Digital Experience Performance by Brand

"How would you rate [BRAND] on digital integration?" (n=varies by brand)

Note: *Digital integration assessment includes website functionality, mobile app experience, online configuration tools, and digital-to-physical handoff process.*



VINFAST	Exceptional online configuration experience Weak online-to-offline integration
HYUNDAI	Strong virtual showroom experience Inconsistent dealer digital capabilities
HONDA	Seamless service booking integration Limited online configuration options
TOYOTA	Strong mobile application experience Traditional dealer-centric approach

SECTION 2: SERVICE EXPERIENCE

Service Touchpoints: Satisfaction vs. Importance

"How satisfied are you with the following aspects of your service experience?" (n=762)
"How important are the following aspects in your overall service satisfaction?" (n=762)

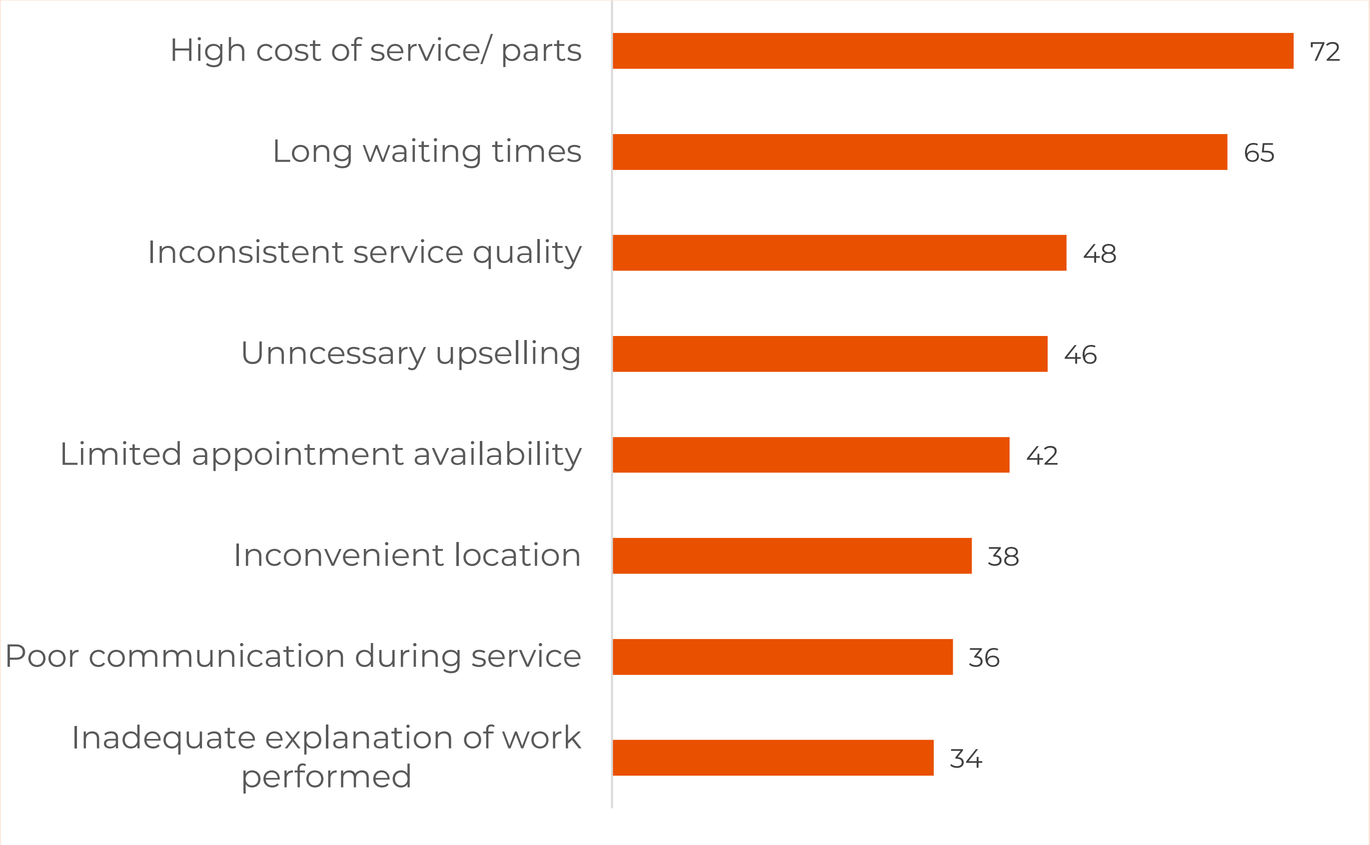
Key Insights

- The **largest gaps** occur in **Work Quality** (16%) and **Price Transparency** (20%), representing critical areas for improvement. These two aspects are also rated as most important by customers, amplifying their impact on overall satisfaction

"Mitsubishi's technicians always provide pictures of worn parts they've replaced. This transparency gives me confidence that the work was necessary and completed properly." **(Mitsubishi Xpander Owner, 42, Da Nang)**

Service Experience Pain Points

"Which of the following issues, if any, have you experienced with your vehicle service?" (n=762)



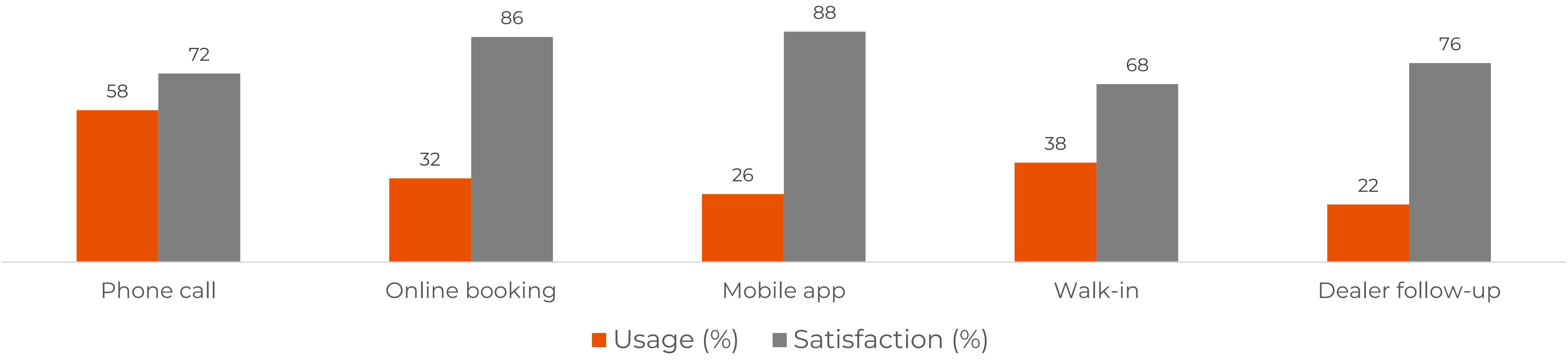
Service Pain Point Analysis

- **Cost-related** concerns (72%) and **time inefficiency** (65%) dominate customer pain points.
- Notably, **unnecessary upselling** (46%) emerged as a significant trust barrier that impacts customer loyalty beyond the immediate service experience.

"The constant upselling during service visits is my biggest frustration with Kia. Every visit, regardless of the condition of my car, they recommend additional services that seem unnecessary. It makes me question their trustworthiness" **(Kia Seltos Owner, 38, Hai Phong)**

Service Appointment Methods & Satisfaction

"How do you typically schedule your service appointments, and how would you rate your satisfaction with each method?" (n=762)



Service Scheduling Insight

- While traditional phone scheduling remains the most common method (58%), **digital approaches** (online booking and mobile apps) **deliver significantly higher satisfaction** (86-88% vs. 72%). This highlights a clear opportunity for brands to shift customers toward digital scheduling methods.

"Toyota's mobile app for booking service is extremely convenient. I can see available time slots, select the services I need, and even get reminders. It's much better than calling and being put on hold." **(Toyota Corolla Cross Owner, 36, Hanoi)**

Service Experience Performance by Brand

"How would you rate [BRAND] on the following aspects of the service experience?" (n=varies by brand)

Brand	Technical Expertise	Price Transparency	Convenience	Digital Integration	Overall Service Value
TOYOTA	90%	81%	84%	76%	88%
HONDA	88%	79%	82%	78%	84%
MITSUBISHI MOTORS	84%	75%	76%	70%	80%
mazda	82%	76%	78%	78%	81%
Ford	82%	71%	74%	72%	79%
HYUNDAI	78%	73%	76%	80%	78%
KIA	76%	71%	74%	76%	75%
SUZUKI	74%	77%	72%	68%	73%
VINFAST	70%	68%	75%	92%	64%

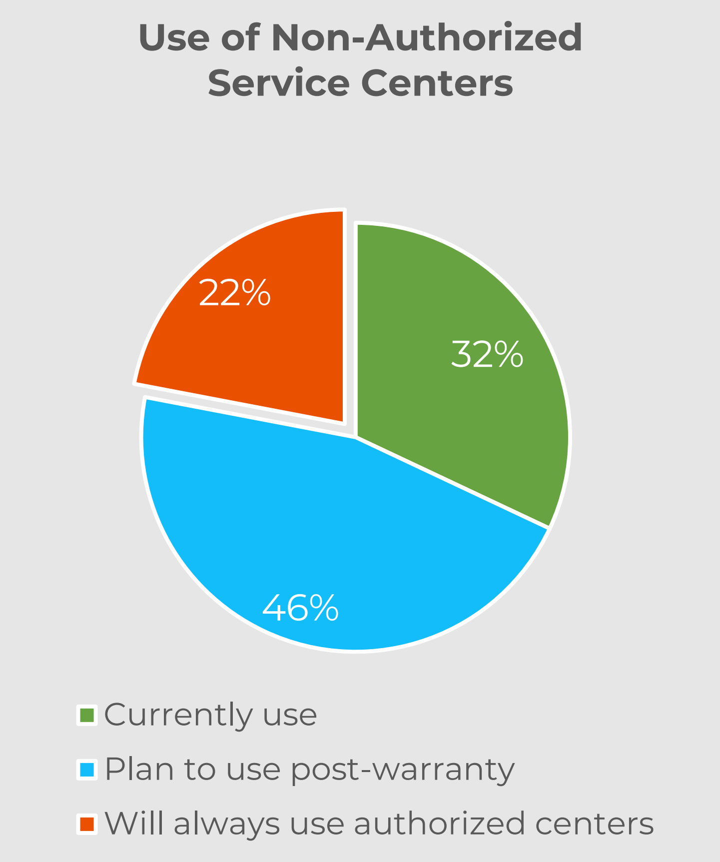
Service Excellence Examples:

"Toyota's service process is remarkably consistent. No matter which service center I visit, the experience and quality are the same. Their technicians are extremely well-trained and thorough." **(Toyota Fortuner Owner, 48, Hanoi)**

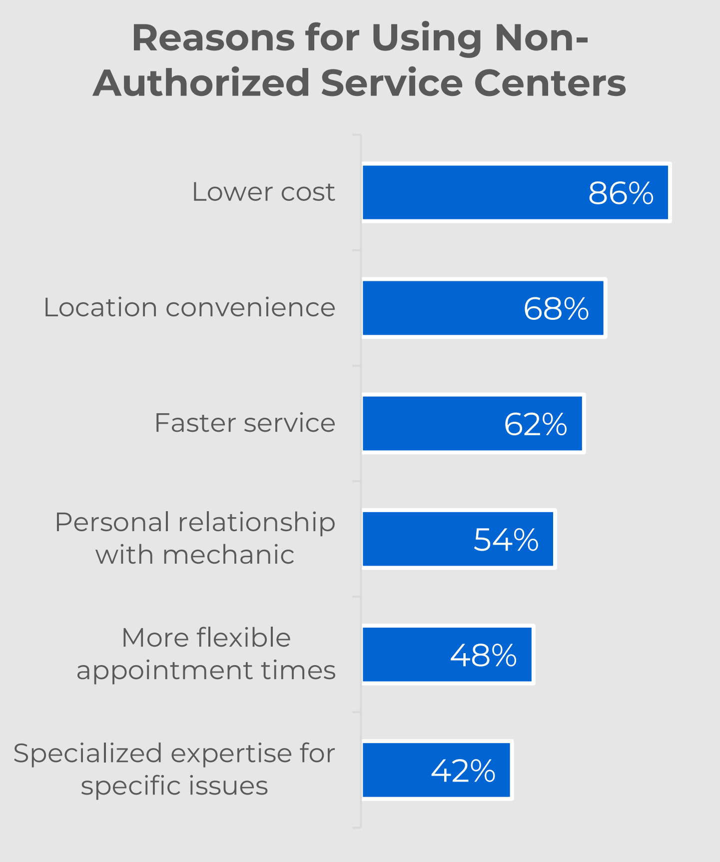
"Mitsubishi's service center has a viewing window where you can actually watch the technicians working on your vehicle. This transparency builds trust in the work being performed." **(Mitsubishi Xpander Owner, 42, Da Nang)**

Use of Non-Authorized Service Centers

"Do you use or plan to use non-authorized service centers for your vehicle maintenance?" (n=762)



"What are your primary reasons for using or considering non-authorized service centers?" (n=594, those who use or plan to use)



Post-Warranty Service Behavior

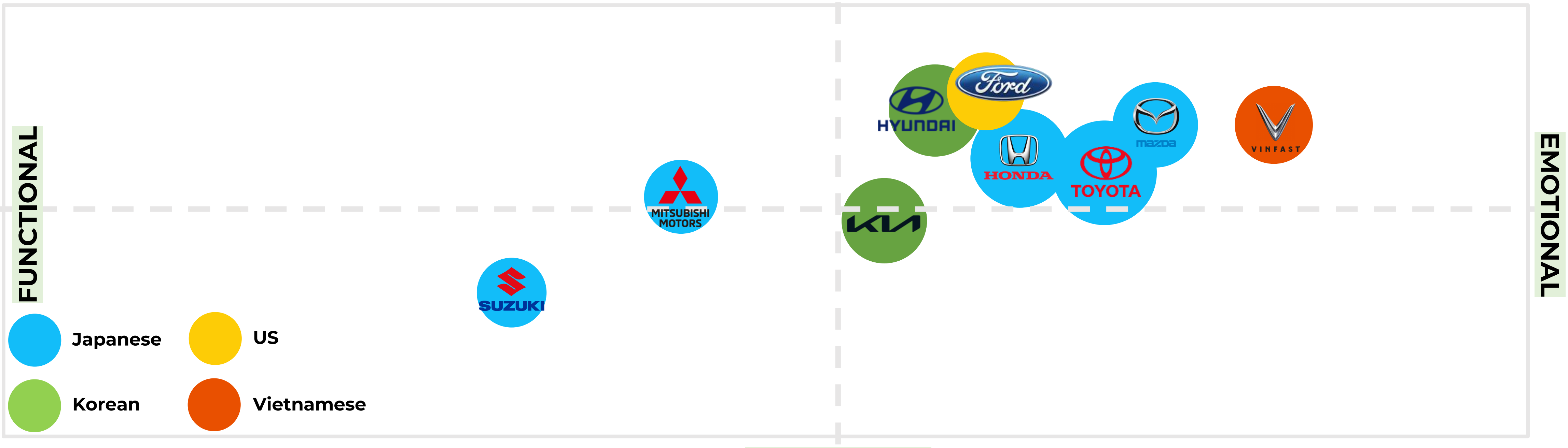
A **significant 78%** of vehicle owners either **already use** (32%) **or plan to use** (46%) **non-authorized service centers**, primarily after warranty expiration. This represents a major challenge for authorized dealers in maintaining service revenue throughout the vehicle lifecycle.

"I use the authorized dealer for warranty services and major repairs, but for routine maintenance like oil changes, I go to my local garage. It's half the price and they use the same quality parts." **(Honda City Owner, 44, Ho Chi Minh City)**

SECTION 3: OTHER FINDINGS

Brand Association Map

Brand positioning based on consumer perception mapping (n=762)



Key Insights

- **Ford** is perceived as more premium than Japanese brands, particularly with models like the Everest and Ranger that command price premiums yet maintain strong emotional appeal tied to adventure and capability.
- **Hyundai** has successfully repositioned upmarket over the past five years through innovation in design, technology, and quality, achieving premium perceptions that exceed traditional mainstream brands.

"Hyundai's brand evolution in Vietnam shows a deliberate and largely successful shift toward premium positioning. Their newer models feature advanced technology, premium materials, and sophisticated design language that consumers now associate more with upper-market brands."
(Market Analysis Insight)

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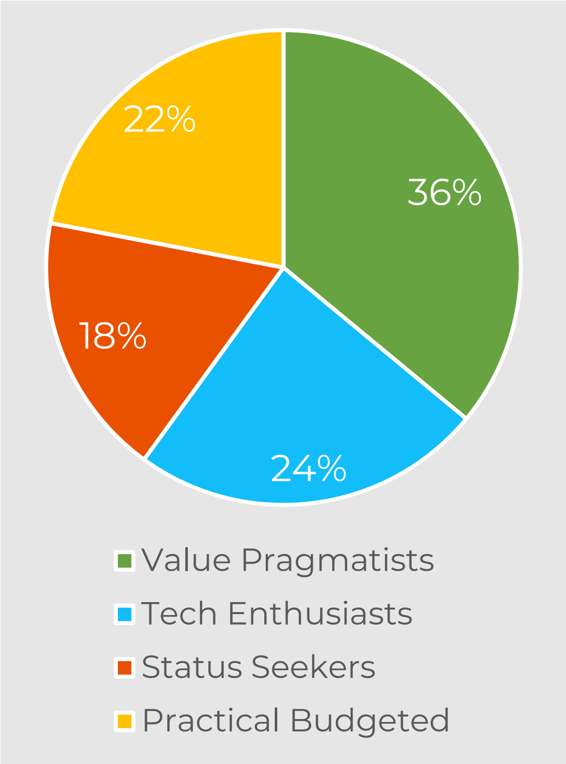
Customer Segmentation



Which of the following best describes your approach to vehicle ownership?" (n=762)

VALUE PRAGMATISTS (36%)

- **Demographics:** 35-55 years, middle-income.
- **Sales Priorities:** Price transparency, reliability.
- **Service Expectations:** Cost-effective maintenance.
- **Brands:** Toyota, Mitsubishi, Suzuki.

TECH ENTHUSIASTS (24%)

- **Demographics:** 25-40 years, higher income.
- **Sales Priorities:** Technology features, design.
- **Service Expectations:** Digital interfaces, updates.
- **Brands:** VinFast, Hyundai, Mazda, Ford.

STATUS SEEKERS (22%)

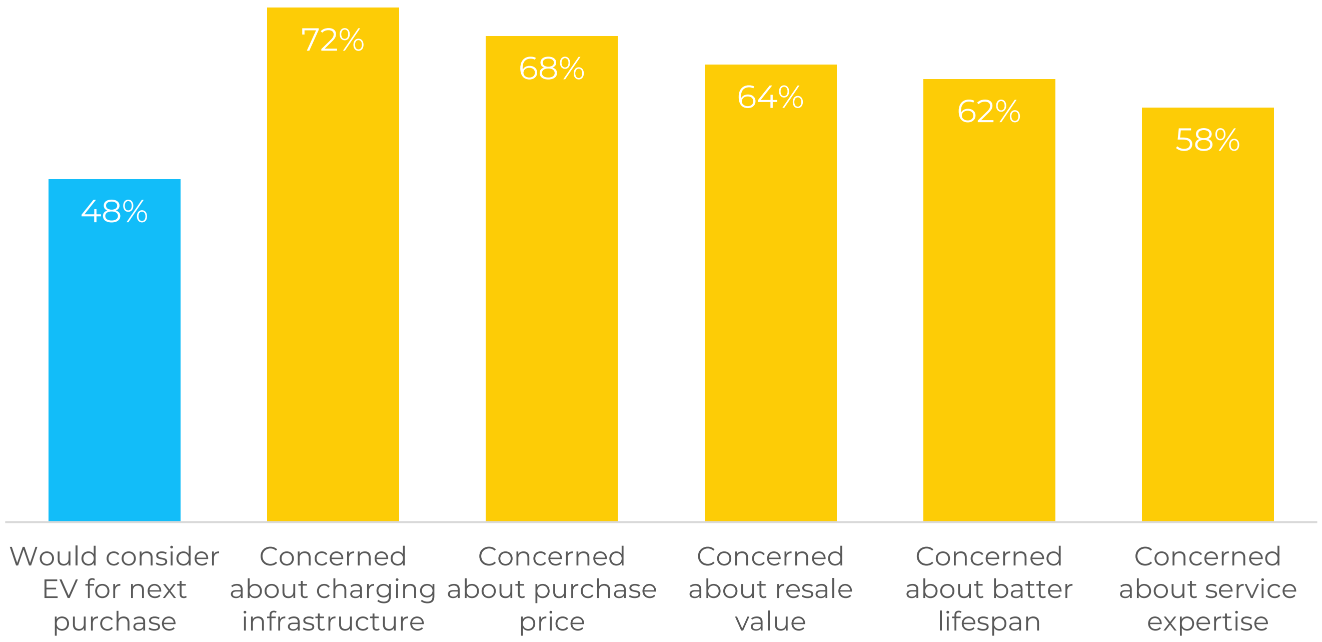
- **Demographics:** 30-45 years, upper-middle income.
- **Sales Priorities:** Brand prestige, premium features.
- **Service Expectations:** Premium treatment, loaner cars.
- **Brands:** Ford, Mazda, Honda (higher trims)

PRACTICAL BUDGETERS (18%)

- **Demographics:** Various ages, price-constrained.
- **Sales Priorities:** Purchase price, resale value.
- **Service Expectations:** Affordable parts, transparency.
- **Brands:** Suzuki, Kia, Toyota (base models)

Emerging Trends & Future Outlook

Electric Vehicle (EV) Transition Attitudes



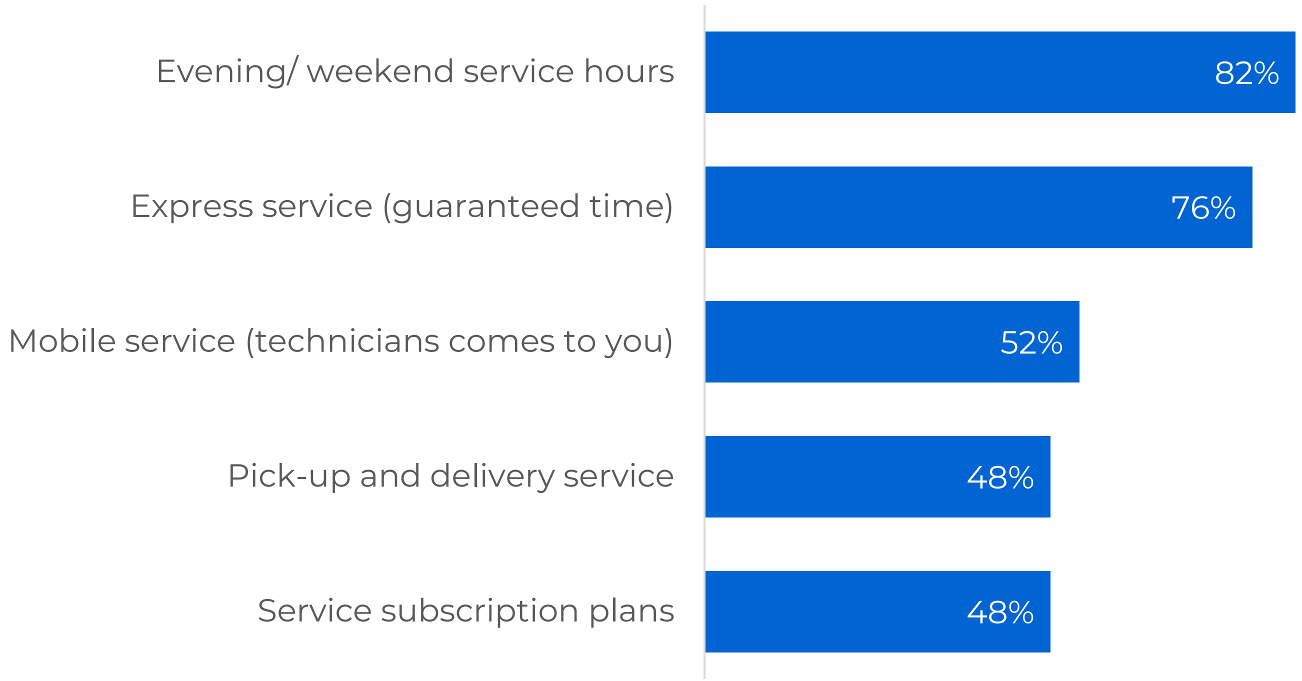
EV Transition Insight

- While interest in EVs is substantial (48% would consider for next purchase), significant barriers remain with charging infrastructure (72%) being the primary concern. This presents both a challenge and opportunity for dealers and manufacturers to address these concerns through education and charging solutions

"I'm interested in VinFast's EVs because of the environmental benefits and potentially lower running costs, but I worry about the charging infrastructure outside major cities, especially for longer trips." **(Current Toyota Owner, 38, Hanoi)**

Emerging Trends & Future Outlook

Interest in Alternative Service Models



Future Service Model Opportunities

- **Expanded service hours** (82%) and **express service guarantees** (76%) represent the highest-interest opportunities for dealers to differentiate their service offerings.
- **Mobile service options** (62%) also show strong potential, particularly among higher-income segments who value convenience over cost.
- By brand segment, **Toyota** and **Honda** customers showed highest interest in express service, **VinFast** customers were most interested in mobile service options, while **Hyundai** and **Ford** customers placed highest priority on extended service hours

Voice of Customers: Key Insights

Honda HR-V Owner, 35, Hanoi

"**Honda's** service management system is impressive. They know my full service history across different dealerships, and can pull up detailed records immediately. This consistency gives me confidence in the quality of service."

Hyundai Santa Fe Owner, 42, HCMC

"With **Hyundai**, their service quality varies significantly between dealers. I've had excellent experiences at their flagship centers but disappointing visits at smaller locations. This inconsistency is their biggest service weakness."

Ford Everest Owner, 46, Da Nang

"**Ford's** technical expertise with their more complex vehicles is excellent, but their transparency about costs could be better. Their initial estimates are often significantly lower than the final bill, which feels like a bait-and-switch tactic".

Toyota Innova Owner, 38, Can Tho

"**Toyota's** extended service hours on weekends have been game-changing for me. I no longer need to take time off work or make complicated arrangements just to get routine maintenance done."

Strategic Recommendations

Sales Experience Recommendations

- **Enhance Digital-to-Physical Integration**: Develop seamless transitions between online research and in-store experiences.
- **Improve Price Transparency**: Address the biggest pain point with clearer pricing structures.
- **Optimize Test Drive Experiences**: Extend test drive routes to include diverse driving conditions.
- **Personalize by Segment**: Develop tailored sales approaches for each customer segment.

Service Experience Recommendations

- **Prioritize Convenience Innovations**: Implement pickup/delivery options and mobile service capabilities.
- **Develop Transparency Initiatives**: Provide photo/video documentation of service work.
- **Enhance Digital Service Integration**: Create comprehensive digital service platforms.
- **Build Long-term Service Relationships**: Create tiered service loyalty programs

Strategic Recommendations

Brand-Specific Opportunities

TOYOTA HONDA
- Leverage service excellence reputation while modernizing digital touchpoints.

HYUNDAI mazda
- Build on product strength with more premium service experiences.

Ford
- Enhance transparency in service pricing while maintaining technical expertise.

VINFAST
- Accelerate service network development while maintaining digital leadership.

KIA SUZUKI
- Focus on service value perception and transparency.

MITSUBISHI MOTORS
- Expand technical expertise communication and service process visibility.

About Us

We Are

INSIGHTASIA

The Asia Market Research Specialist

Bringing a deep understanding of local needs, lifestyles, preferences & trends

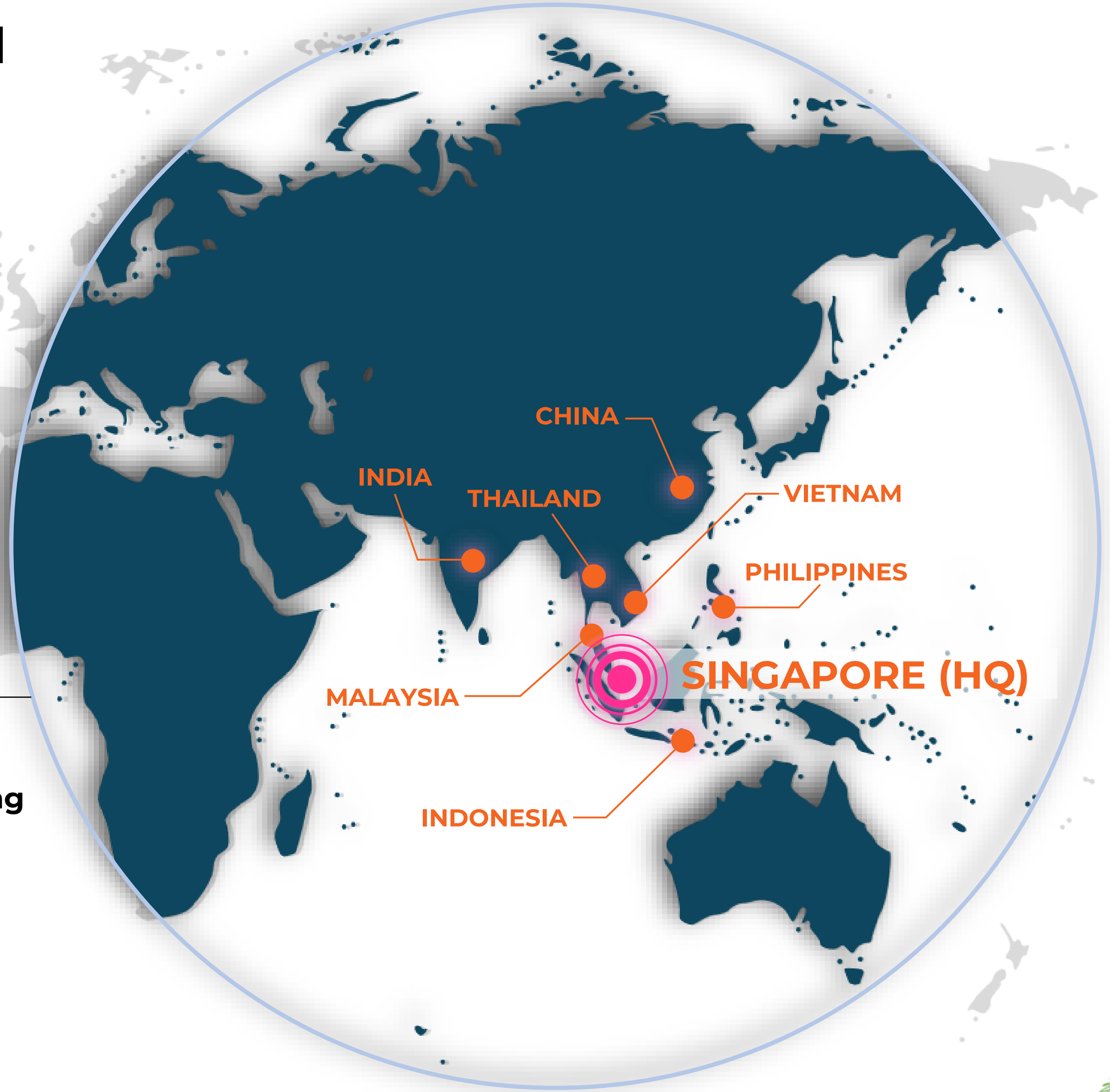
We are TRULY LOCAL

Founded in Asia, focused on Asia.

Our locally based research experts deliver a richer understanding of the Asian consumer context.

Delivered through our 6 full-service offices, specialist sensory office in India and field servicing office in China.

Rich local knowledge: 120+ on the ground researcher.



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We Are

SMALL enough to care & BIG enough to trust

We champion innovative research

Technical rigor and quality control, combined with research passion, creativity and smarter thinking

We bring real local knowledge

To provide ‘up to the minute’ understanding of the evolving competitive & consumer context

Our Clients Trust Us
Because We Understand

- Asia.
- Efficient and effective research design.
- The need for practical and actionable solutions.

We Are your

THINKING PARTNERS

Local & Regional Clients

Across Industries

...and more

(B2C) What we do

Survey: F2F/ Online

Focus Group

Home Usage Test

Central Location Test

Along shopping

Retail check/ audit

Ethnography

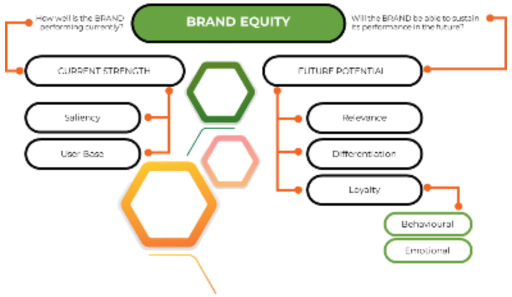
Mystery shopping

(B2B) What we do

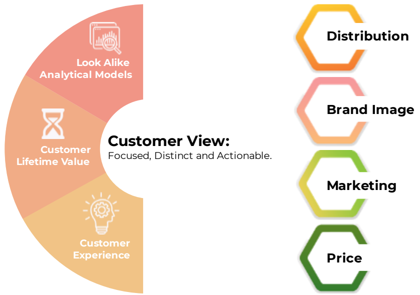
Survey: F2F/ Online

In-depth Interview

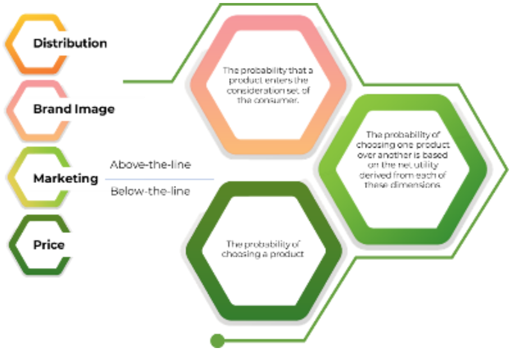
Competitor Analysis



Market Analysis



ROMI Analysis



Ideation Workshop

Mr. Pham Anh Tuan

Research Director, Country Manager || VIETNAM

Tuan is a seasoned senior marketing research with over 15 years of expertise, **specializing in B2B marketing research**. His focus is on market exploration and penetration studies within various sectors, both locally and regionally. With a **unique background in IT and market research**, Tuan leverages his technical skills to enhance data analysis and market insights, providing a comprehensive understanding of market dynamics.

Renowned for his **analytical skills** and **consultative approach**, Tuan has contributed significantly to the understanding of consumer trends and market dynamics.

Tuan's insights are occasionally featured in local newspapers i.e. Dan Tri, Tuoi Tre Online, and on Vietnam primary TV channels, where he shares his expert vision on the evolving markets.

2009 – 2016	2016 – 2021	2021 – 2023	2024 – Now
Manager, Epinion Vietnam	Research Director, Asia Plus (Q&Me) & Kadence Vietnam	Research Director, Macromill Vietnam	Country Manager InsightAsia Vietnam

Ready to
EXPLORE

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