

## Press release

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Contact: Isabel Box  
Title: Senior Marketing & Communications Manager  
Tel: +32 (0)2 302 25 51  
Mobile: +32 (0)485 31 79 63  
Email: [ibox@deloitte.com](mailto:ibox@deloitte.com)

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### Belgians still prefer vehicles with an internal combustion engine

*Deloitte study indicates Belgians are not yet won over by electric vehicles and one in three questions the need to personally own a vehicle.*

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Deloitte today introduces the latest edition of its Global Automotive Consumer Study, a survey conducted among more than 25,000 consumers in more than 25 countries, of which 1,000 Belgians, on a variety of critical issues impacting the automotive sector. The study reveals that despite the rising number of electric vehicles, private consumers in Belgium continue to prefer the familiar internal combustion engine. The main barriers for consumers are still the high purchase price and concerns about driving range. In addition, the report shows that more than one-third of consumers are questioning whether they need to own a vehicle at all due to their use of shared transportation modes

#### Only 12% of consumers prefer a Battery Electric Vehicle for Their Next Car

The transition towards zero emission vehicles remains a significant challenge for the Belgian car parc. Although the number of electric vehicles continues to rise, it is driven primarily by the corporate market, whereas the study indicates that the internal combustion engine remains favoured among private consumers. Last year, 39% of respondents expressed a preference for a gasoline or diesel vehicle as their next car; this year, it has actually risen to 41%, a slight increase of 2%. Only 12% would choose a Battery Electric Vehicle (BEV). Hybrid vehicles (17%) are doing better, while plug-in hybrids (10%) are somewhat less popular.

*"While the corporate vehicle market is moving towards an electric mobility future, private consumers are not yet convinced. The high up-front purchase price of BEVs is the biggest barrier for private individuals in Belgium, more so than in any other country in Europe. 70% of consumers planning to buy a gasoline/diesel car expect to pay less than 30k EUR, while only 48% of those buying a BEV can say the same. Today there are still only a limited number of models available in this price range, the majority of which are manufactured by a non-EU brand, with consumers awaiting the launch of a broader range of BEVs in the next year" says Aled Walker, Automotive Leader, Deloitte Belgium.*

*"BEVs need to become more affordable in order to convince the consumer to switch, for example through increased incentives or flexible private financing and subscription offerings. Only 24% of Belgian consumers cite government incentives, subsidies and stimulus programs as a key factor in their decision to acquire a BEV, lower than every European market apart from the UK (21%). By comparison, this is 32% in France and 30% in Germany. Furthermore, nearly half of Belgian consumers plan to finance their next vehicle with either a loan or lease contract, with lots of interest in longer durations to keep monthly payments in check", Aled Walker continues.*

#### Belgians Want at Least 400km Driving Range and the Ability to Charge at Home

The number of public charging stations is growing each year, and with it, the willingness of people to use them. Nevertheless, it is striking that those considering an EV mainly plan to charge it at home, as much as 65%. A smaller group of 16% expects to charge mainly at work and 18% at public charging stations.

Belgian consumers are quite pragmatic when it comes to finding a public charging station. 43% are happy with any public charging location as long as they can find a charger when they need it, while 15% prefer on-street parking, which is higher than any other European market.

When asked about the most important aspect of the charging experience, a majority of 31% agree that especially a high charging speed is important. Additionally, the location must be easy to find (18%) and the charging stations easy to use (14%). Somewhat surprisingly, available amenities (toilets, coffee, food, etc.) rank last (2%).

Among non-EV drivers, after the high purchase price, range anxiety plays a significant role. Half of the respondents say that range is their biggest concern when switching to an EV. Only 1 in 4 would consider a BEV with a driving range below 400kms as a viable option for their next vehicle .

Sustainability is also becoming increasingly important for Belgian automotive consumers, 44% state that concern for the environment is a key factor in the choice of their next vehicle, while three in four are concerned about the end-to-end environmental impact of an electric vehicle battery. This highlights the continued need for clearly defined sustainability strategies across the automotive value chain.

### **One in Three Belgians Doubt the Necessity of Owning a Car**

A third of Belgian consumers question if it still makes sense to own a car given the rise of shared mobility options, although this is yet to translate into a significant change in buying behaviour in the market. More than half of the consumers acknowledge that although switching to various mobility solutions in Belgium can be challenging, it is acceptable if it leads to a shorter travel time.

The trend of reconsidering car ownership is further strengthened by the fact that nearly one in five consumers (18%), especially young people, show an interest in subscribing to a car-subscription service. Cost control (42%), ease of use (42%), and flexibility (32%) are the main driving forces. On the other hand, vehicle availability (45%), missing the sense of ownership (35%), and fear of higher costs (34%) are the main concerns consumers have regarding car-sharing subscription services.

*"It is clear that the traditional model of car ownership is increasingly being questioned. More than one-third of consumers are considering whether they need to own a vehicle going forward based on their use of shared transportation modes. One in four consumers under 34 years old could be interested in giving up vehicle ownership altogether in exchange for a vehicle subscription. The willingness to reconsider car ownership reflects a deeper change in consumer attitudes, which now place more value on flexibility. It is up to the industry to not only keep pace with this evolution but also to facilitate it with tailor-made mobility services that meet these new consumer needs," said Aled Walker.*

Global Automotive Consumer Study: [www.deloitte.com/be/automotive-consumer](http://www.deloitte.com/be/automotive-consumer)

### **About the Global Automotive Consumer Study**

Deloitte's Global Automotive Consumer Study is an annual survey, conducted in October 2023, with more than 25 000 consumers in more than 25 countries, including 1 000 Belgians. The study provides key insights into consumer behavior on mobility and its impact on the global automotive sector. Visit: [www.deloitte.com/be/automotive-consumer](http://www.deloitte.com/be/automotive-consumer)

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