

## Press release

---

**Date:** 26 February 2026

---

**Contact:** Name: 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)

---

**Subject:** Automotive consumer study

---

### Income gap offers an answer to slow BEV adoption in Belgium Deloitte study finds that preference for electric vehicles remains low for private individuals in Belgium, largely driven by lower income consumers who find higher costs and a limited second-hand market obstacles to adoption.

#### Key highlights:

- Battery electric vehicle (BEV) adoption in Belgium remains stagnant with 12% preferring it for their next vehicle compared to 11% in 2025.
- Adoption is uneven across different demographics in Belgium with 59% of lower income households expressing a preference for internal combustion engine (ICE) vehicles for their next purchase, while only 6% are considering a BEV.
- Belgian consumers show the strongest interest in the second-hand market (37%) and appear less inclined to stay loyal to a brand - indicating a strong price-sensitivity.
- Consumers in Belgium place the highest value on connected features that enhance safety and security despite concerns about data-sharing remaining high.
- Compared to neighboring countries, Belgians are the most reserved about software-defined vehicles but are interested in Over The Air (OTA) capabilities that have the potential to extend vehicle lifecycle.

#### Brussels, 26 February 2026

Deloitte has released its latest edition of the Global Automotive Consumer Study, a survey of over 28,000 private consumers worldwide, including 1,004 Belgian respondents. The study provides insights into consumer preferences for battery electric vehicles (BEVs), shifting purchase intentions, and shifting attitudes towards in-vehicle software and capabilities. While the findings indicate that Belgian consumers are not budging in their preference for petrol and diesel vehicles, a closer look at the data shows that this preference is largely being driven by low-income consumers (those with an annual income of below €27,000).

#### Three fifths of low-income consumers prefer ICE for their next vehicle

Across all demographics, 45% of consumers prefer a petrol or diesel vehicle next, compared to 31% for hybrid vehicles and 12% for BEVs, demonstrating that there is consumer demand spread across different vehicle technologies. For price-conscious Belgians, the price premium on electric vehicles remains the biggest concern (43%) holding them back from the decision to purchase one, while lower fuel costs remain the biggest motivator (37%) to purchase. Despite the growing availability of BEVs and the potential they have to

help consumers save money on fuel costs in the long term; they nevertheless remain out of reach for a large portion of the population.

Low-income consumers overwhelmingly express a preference for an internal combustion engine (ICE) for their next vehicle (59%) with only 37% of high-income consumers (those earning €48,100 and over) sharing that same preference. In contrast, one fifth of high-income consumers are considering a BEV for their next vehicle while a meagre 6% of low-income consumers report the same intention. Middle-income consumers (those earning between €27,000 and €48,099) fall somewhere in the middle, with 44% preferring an ICE for their next vehicle, and one tenth considering a BEV. Among Belgians of all incomes, product quality and price were the top two factors influencing their next vehicle purchase, with over half (51%) indicating that those factors mattered most to them, followed by vehicle performance (27%).

"Belgian consumers are as price-driven as ever," **says Aled Walker, Automotive Leader at Deloitte Belgium.** "Consumers continue to demand vehicles across all powertrain options, from the traditional internal combustion engine through to hybrid and electric vehicle technologies. While BEV adoption remained stagnant, consumers report that the potential cost savings on fuel would be the biggest driver to purchase a BEV while the price premium remains the biggest hurdle to purchasing. A closer look at the data reveals that there is a significant gap between the attitudes of the highest and lowest income consumers, with only 6% of low-income consumers considering a BEV compared to one fifth of high-income households. In other words, the potential benefits of electrification such as lower long-term costs and access to new sustainable technologies are being concentrated among higher income groups. If this imbalance remains unaddressed, there is a risk that the transition to zero-emission mobility will start to reinforce a broader social divide in Belgium."

## Belgians prefer shopping on the secondhand market, but BEV availability is limited

The price-sensitivity of Belgians is further reinforced by the growing interest in the second-hand car market as well as the lack of loyalty to a single brand. Consumers aged 18 – 34 (55%), low-income consumers (52%), and women (44%) in particular are more likely to opt for a used vehicle than for a new one. However, BEVs have not yet entered the used car market in large volumes.

Uncertainty around battery health and the potential replacement costs also make used BEVs a perceived risk for households with limited financial buffer. In this context, nearly new and certified preowned ICE vehicles remain the predictable and preferred option. There is also a marked disparity in the payment method used between the new and used car markets with 80 – 82% of used cars purchased with cash while 80.5% of new cars are bought with loans.

Meanwhile, Belgians tend not to be loyal to a particular brand of car, with 48% owning a car that is a different brand from their previous car. When ranking the factors that drive vehicle purchase decisions, only a little over a quarter said that brand familiarity (26%) was important while 16% reported that brand image is an important factor in their next vehicle purchase.

"The strong appetite for second-hand vehicles shows that affordability is the real bottleneck for many Belgian households," **adds Aled Walker, Automotive Leader at Deloitte Belgium.** "To ensure lower-income consumers can access zero-emission mobility, the second-hand BEV market would benefit from enhanced transparency and support regarding battery health, warranties, and pricing, building on existing efforts to strengthen market confidence."

## Belgian consumers least convinced of the perceived usefulness of software-defined vehicles

Out of all the European countries surveyed, Belgian consumers appeared to be the least interested in the idea of their next vehicle allowing customization and feature expansion through its lifecycle, with two fifths reporting that it is not useful (40%), while 31% said that it was useful. Consumer interest in using their vehicles as platforms for integrated services remains low in Europe as compared with countries such as China. Belgium and the Netherlands are least interested in these types of services, with only 19% in each market showing an interest.

When it comes to additional features, Belgian consumers are willing to pay for Over The Air (OTA) update capabilities when they can add features that improve vehicle health and maintenance monitoring (45%), safety and security (43%), and driver assistance features (40%). Less than a third of Belgian consumers indicated that they would be likely to use AI-enabled vehicle customization features (30%), lower than their peers in neighbouring countries. A large share would keep their vehicles longer if updates continued throughout ownership, positioning software as a key lever for enhancing loyalty and expanding software-based revenue opportunities.

For Belgian consumers, the biggest area of concern around the sharing of data with OEMs and insurance companies was the data from in-cabin cameras (46%), data synced from connected devices (45%), data related to use of connected services (45%) and biometric data from cockpit sensors (44%).

## Authorized dealers remain the preferred service destination

Belgians prioritize service quality, trust, and transparency when choosing and evaluating vehicle service providers which possibly explains why the majority of Belgians choose a dealer for vehicle service (68%). While a trusting relationship (21%) and quality of work (18%) were the most important driver when choosing this service provider, the most important aspect of the vehicle service experience was the cost (28%), transparency around pricing (14%) and the level of customer service (14%). At the end of the day, Belgian car owners value clear, fair, and well-explained servicing outcomes.

Link to the full report: [www.deloitte.com/be/automotive-study](http://www.deloitte.com/be/automotive-study)

---

### Deloitte in Belgium

With more than 5,400 employees in 11 offices in Belgium, Deloitte is the largest organisation in the field of audit, accounting, legal and tax advice, consulting, financial advisory services and risk advisory services.

Our services are aimed at the largest national and international companies as well as at SMEs, the public sector and non-profit organisations. Deloitte Belgium is an independent and autonomous organisation and a member firm of Deloitte Touche Tohmatsu Limited. For the financial year 2025, a turnover of €822.2 million was realised.

Deloitte Belgium BV is the Belgian affiliate of Deloitte NSE LLP, a member firm of Deloitte Touche Tohmatsu Limited that focuses on the highest quality in delivering professional services and advice. Its services are based on a global strategy covering more than 150 countries. To this end, the expertise of over 470,000 professionals is available in all continents. For the financial year 2025, the turnover was more than 70.5 billion US dollars.

Deloitte refers to a Deloitte member firm, one or more associated companies, or Deloitte Touche Tohmatsu Limited, which is a private limited liability company in the UK ("DTTL"). DTTL and its member firms are each legally separate and independent entities. DTTL (also known as "Deloitte Global") does not provide services to clients. Please visit <http://www.deloitte.com/about> for a more detailed description of the legal structure of DTTL and its member firms.