

## Press release

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### Interest in ICE vehicles rises as Belgians hesitate on EV adoption

*Deloitte study finds nearly half of Belgian private consumers prefer petrol or diesel cars over battery electric vehicles (BEVs), citing high upfront costs and charging concerns—a four percentage point increase from last year.*

#### Key highlights:

- 45% of Belgian consumers still prefer petrol or diesel vehicles, up from 41% last year, while only 11% would opt for a battery-electric vehicle (BEV). Consumer interest in BEV remained flat in last three years despite more models coming to the market and increased charging infrastructure.
- High upfront costs (49%) and charging concerns (43% range anxiety, 40% charging time) remain the biggest barriers to EV adoption.
- Less than 20% of respondents intend to purchase a vehicle within the next year, while nearly half of consumers plan to wait between one and five years
- Nearly half of Belgian consumers consider Apple CarPlay and Android Auto integration essential for next vehicle
- One in three young and urban consumers are open to Mobility-as-a-Service (MaaS) as a flexible alternative to private car ownership.

**Brussels, 11 February 2025** – Deloitte has released its latest edition of the *Global Automotive Consumer Study*, a survey of over 30,000 private consumers worldwide, including 1,000 Belgian respondents. The study provides insights into consumer preferences for battery electric vehicles (BEVs), shifting purchase intentions, and the growing role of alternative mobility solutions. The findings indicate that Belgian consumers are delaying car purchases and continue to prefer petrol and diesel vehicles over BEVs. Meanwhile, younger and urban consumers are increasingly open to flexible, shared mobility solutions, but cost remains a major factor in decision-making.

#### 45% of Belgian consumers still prefer ICE for their next car - a four percentage point increase from last year

Despite the growing availability of electric vehicles, **45% of Belgian consumers still prefer a gasoline or diesel engine for their next car**, an increase from 41% last year and 39% in 2023. In contrast, only 11% would choose a BEV. However, compared to other European countries, this figure is relatively high—France (9%), Spain (7%), and the UK (8%) all report lower BEV preference rates. Only Germany (14%) ranks higher among private consumers. The high upfront cost remains the biggest barrier, cited by 49% of respondents, followed by range anxiety (43%) and concerns over charging time (40%).

**Charging accessibility** also plays a significant role, with 65% of consumers preferring to charge at home, 17% at work, and 17% relying on street parking. In comparison, 80% of UK consumers charge at home, followed by 71% in Germany, while Belgium aligns closely with France and the Netherlands.

*"The high upfront cost remains the biggest hurdle for Belgian consumers when considering a switch to EVs," says Aled Walker, Automotive Leader at Deloitte Belgium. "Nearly half of respondents cite affordability as their primary concern, and for many, the financial gap between traditional internal combustion engine vehicles and EVs is still perceived as too large. Additionally, charging accessibility remains a key barrier, particularly for urban residents and lower-income households who do not have access to private home charging. While 65% of consumers prefer to charge at home, those without a driveway or garage—around 35%—must rely on public charging infrastructure, but this can often be significantly more expensive to charge. Addressing these financial and infrastructure challenges will be essential for driving EV adoption forward in Belgium."*

## Lower fuel costs drive EV interest – women less likely to consider BEV

While **50% of respondents that are interested in BEVs are drawn to electric vehicles for lower fuel costs**, environmental concerns are becoming less of a deciding factor, with only 37% citing sustainability as a key reason for switching. Younger generations remain the most environmentally conscious, but for most consumers, financial considerations take precedence. Additionally, 28% of respondents find EVs attractive for their smooth driving experience and lower maintenance costs, while another 28% worry about potential new taxes or levies on internal combustion engine (ICE) vehicles.

The study also highlights a notable gender gap in EV adoption. **Women and low-income households are significantly less likely to consider BEVs**, primarily due to a preference for second-hand vehicles, limited home charging access, and a lack of knowledge about EV technology. On average, 11% of Belgian consumers would choose a BEV for their next car, but this figure rises to 14% among men while dropping to just 8% among women—underscoring a clear divide in adoption rates.

When asked about the **most important factors in an EV charging experience**, 36% of respondents prioritize fast charging times, followed by ease of use (17%) and location accessibility (10%). Notably, women are the only group to rank personal security among their top three concerns. This also reflects in their charging location preferences, with 24% of female respondents favoring traditional gas stations with EV chargers over dedicated EV charging hubs.

## Nearly half of Belgian consumers consider Apple CarPlay and Android Auto integration essential for next vehicle

The study also highlights the increasing role of **connectivity and artificial intelligence (AI)** in modern vehicles, with consumers expecting seamless integration with their digital ecosystems. Despite efforts by automakers to promote proprietary connected services, nearly half of Belgian consumers (48%) consider Apple CarPlay and Android Auto integration essential when selecting their next vehicle. This preference suggests that consumers prioritize familiar, user-friendly solutions over manufacturer-specific systems.

Beyond infotainment, **AI-driven safety and vehicle management features are gaining traction** among Belgian consumers. The study reveals a growing willingness to pay extra for features that enhance security and convenience. More than half of respondents express interest in paying extra for emergency assistance (54%), automatic detection of vehicles and pedestrians (53%), and anti-theft tracking systems (52%). However, despite this enthusiasm for AI-powered driving aids, trust in data management remains a significant barrier. While 31% of consumers trust vehicle dealers to handle their data, 20% do not trust any entity to manage their vehicle's information securely.

## Car buyers are postponing their next purchase – ICE remains top choice

The Belgian private new car market continues to face delays, with many consumers postponing their next vehicle acquisition by one to five years. According to the study, **less than 20% of respondents intend to purchase a vehicle within the next year, while nearly half of consumers plan to wait between one and five years**. This trend indicates that Belgium's private car market has yet to recover fully, especially when compared to neighbouring countries like France, Germany, and the UK, where over 20% of consumers plan to buy a new car within six months to a year.

The second-hand market is crucial, especially for younger buyers, women, and lower-income households, who prefer certified pre-owned (CPO) or older used cars for affordability. Battery-electric vehicles (BEVs) remain marginal in the used market, with demand for ICE vehicles significantly higher, reinforcing cost as a key barrier to electrification.

*“Given the economic context and uncertainty about new technologies, the used car market is becoming increasingly important, with 1 in 5 Belgian consumers who drives a new car today planning to buy a used car next”, says Aled Walker, Automotive Leader at Deloitte Belgium. “However, EVs remain a very small percentage of the used car market, with only 5% preferring a BEV next, compared to 20% of those shopping for a new car. Today, many consumers remain concerned about battery replacement costs and uncertain resale value. The availability of affordable and reliable BEVs in the second-hand market could be a key enabler towards making zero emission mobility accessible to all.”*

Despite changing mobility trends, private vehicle ownership remains central to Belgian consumers, with 68% using their car at least weekly. While 52% of respondents are not yet ready to give up car ownership, one in three young consumers (18-34) and urban residents express interest in Mobility as a Service (MaaS) as an alternative.

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

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