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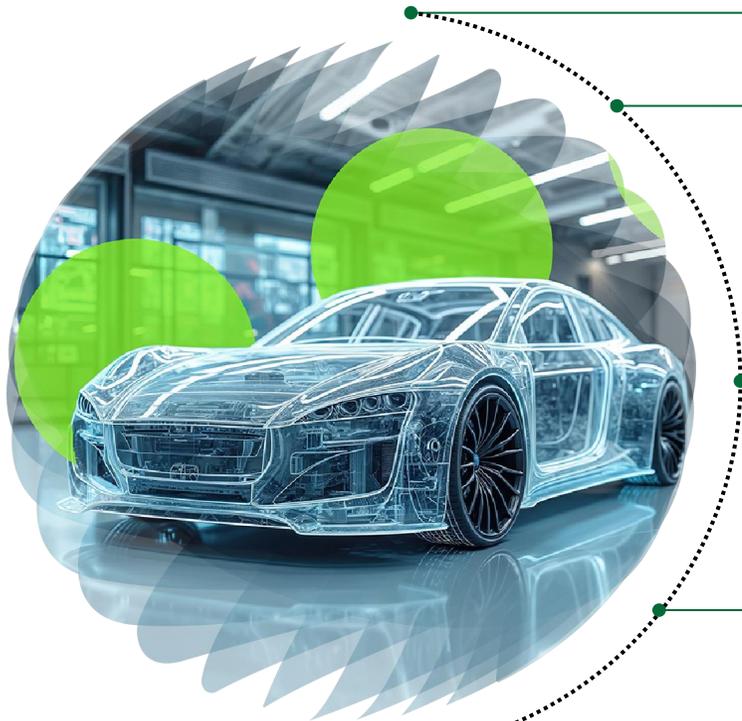


2026 Global Automotive Consumer Study

Key findings: Belgium

February 2026

Key findings: Private consumers in Belgium



- 1 Battery electric vehicle (BEV) adoption remains stagnant but is uneven across the different demographics.**

Lower fuel costs remain a key motivator for consumers in Belgium considering electrified options, yet concerns around driving range, charging time, public charging availability, and battery performance continue to shape adoption. Most EV intenders prefer to charge at home while cost remains an important factor in public charging decisions. At the same time, uncertainty around who should manage end-of-life batteries signals broader ecosystem gaps that should be addressed as electrification scales.
- 2 Belgian consumers show strong interest in the second-hand market and seem less inclined to stay loyal to a brand, underscoring their strong price-sensitiveness.**

Consumers expect OEMs to compete on product quality and price, with vehicle performance and brand familiarity also playing an important role in their decision-making process. Most Belgian consumers still rely on a single channel of information with dealer visits being the most used, while getting a good deal and transparent pricing continue to play a central role in purchase decisions. Cash and loans remain the preferred payment methods, but interesting niches are appearing.
- 3 Connected features that enhance safety and security rank as the most valued, while concerns about data sharing remain high.**

Vehicle health and maintenance, safety and security enhancements, and driver assistance features draw the strongest willingness to pay, whereas data from synced devices, in-cabin cameras, and connected services raise the most concern, highlighting the need for greater trust and transparency in connected services.
- 4 While they have reservations about software-defined vehicles (SDVs), Belgian consumers are interested in over-the-air (OTA) capabilities and their impact on extending the vehicle lifecycle.**

Belgian consumers are not yet willing to use AI-enabled customisation that adapts settings automatically and show little interest in using their vehicles as platforms for integrated services. However, they are willing to pay for OTA-update capability, particularly when it can eliminate the needs for workshop visit. 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.
- 5 Service quality, trust, and transparency are the priority when choosing and evaluating vehicle service providers.**

Authorised dealers remain the most common service destination. Quality of work and trust are the primary reasons for choosing a provider, while clear explanations of pricing and the work performed define the service experience.

Contents



0 About the study



1 Vehicle electrification



2 Future vehicle intentions



3 Software defined vehicles



4 Vehicle servicing

About the study

Survey timing

October to November 2025.

Sample

The survey polled a sample of 1,004 private consumers in Belgium.

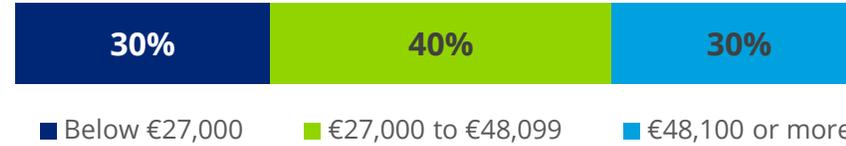
Methodology

The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire via email.

Respondents were asked a series of 70+ survey questions covering key consumer attitudes and behaviours.

Benchmarked against more than 28,500 respondents from 27 countries around the world.

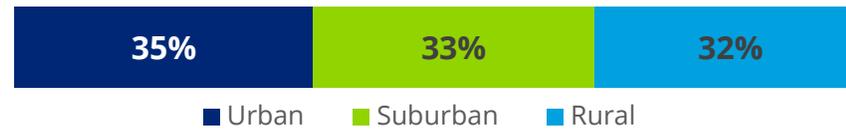
Household income



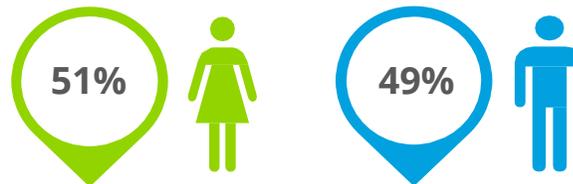
Age group



Location



Gender

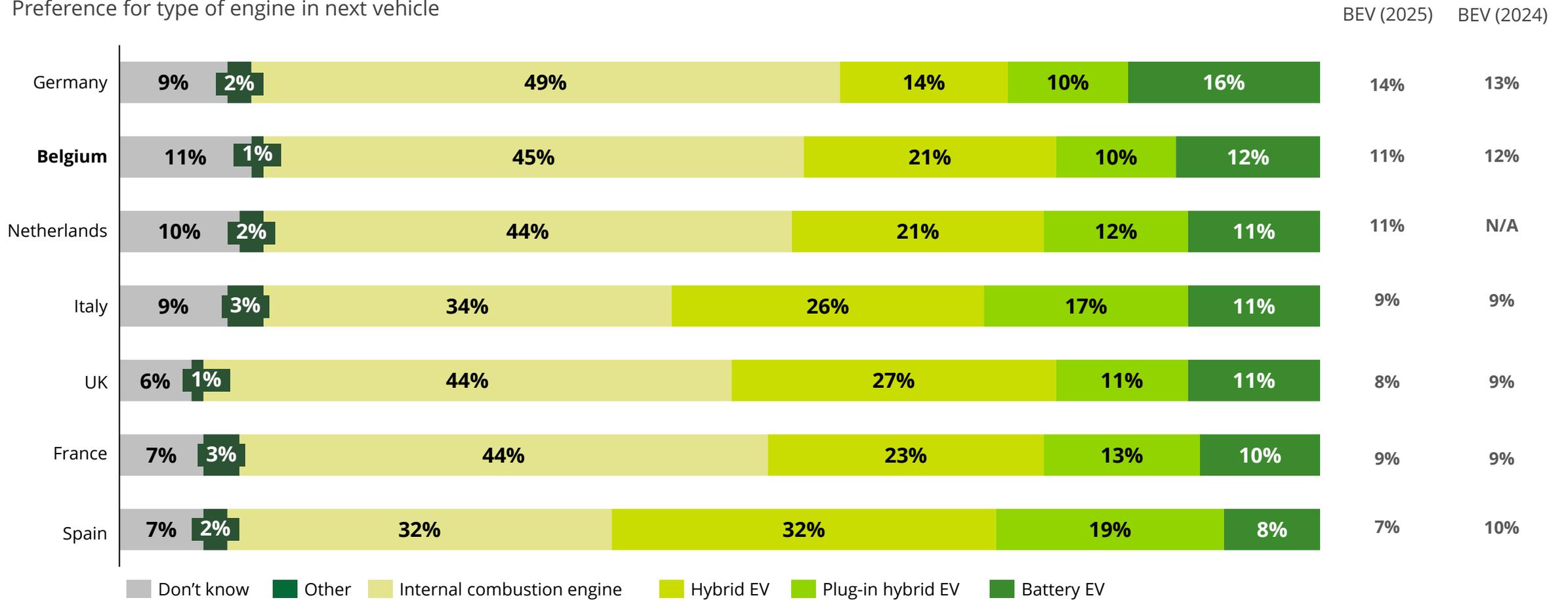


1 Vehicle electrification



Europeans still prefer traditional internal combustion engines

Preference for type of engine in next vehicle



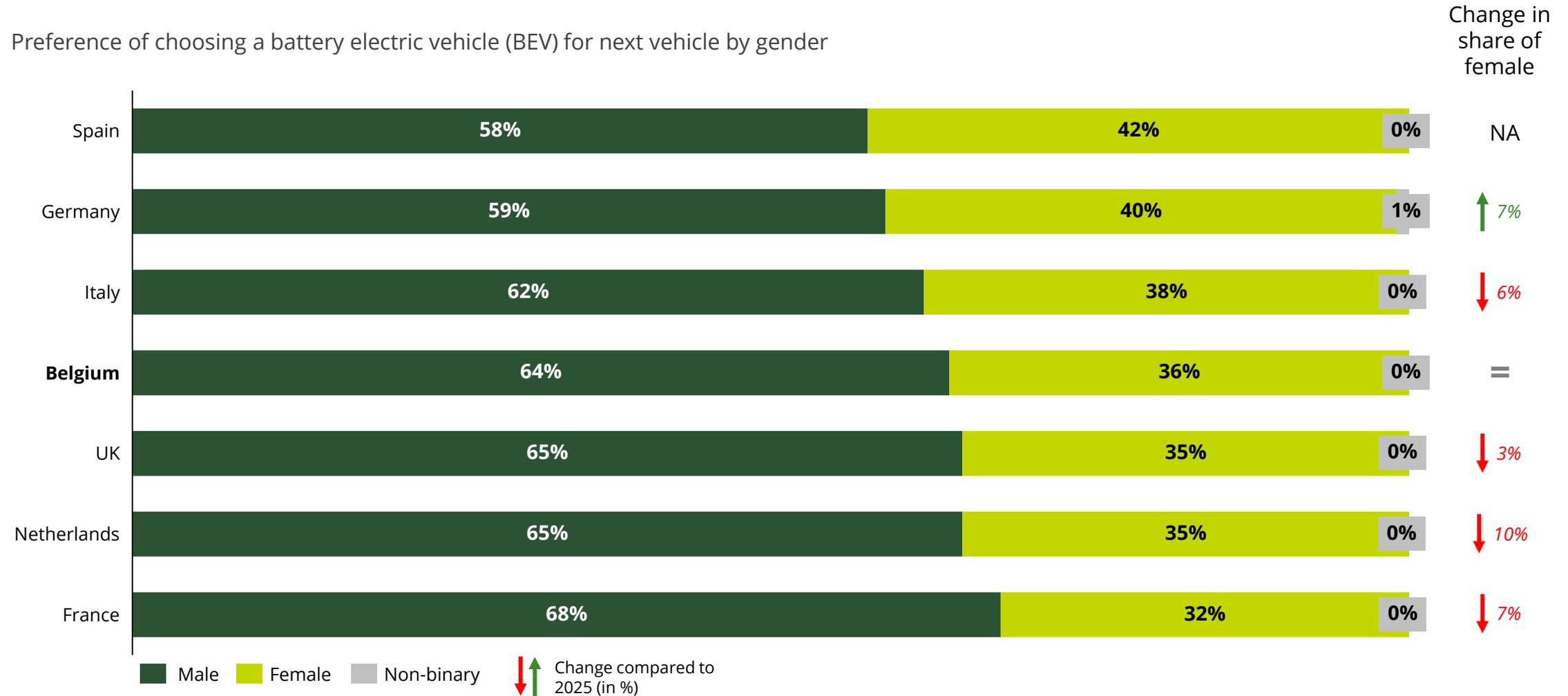
Note: "Other" includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells

Q41. What type of engine would you prefer in your next vehicle?

Sample size: n = 1,280 [2026, DE]; 878 [2026, BE]; 910 [2026, NL]; 909 [2026, IT]; 1,363 [2026, UK]; 832 [2026, FR]; 864 [2026, ES]

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2 in 3 Belgians who prefer a BEV are male



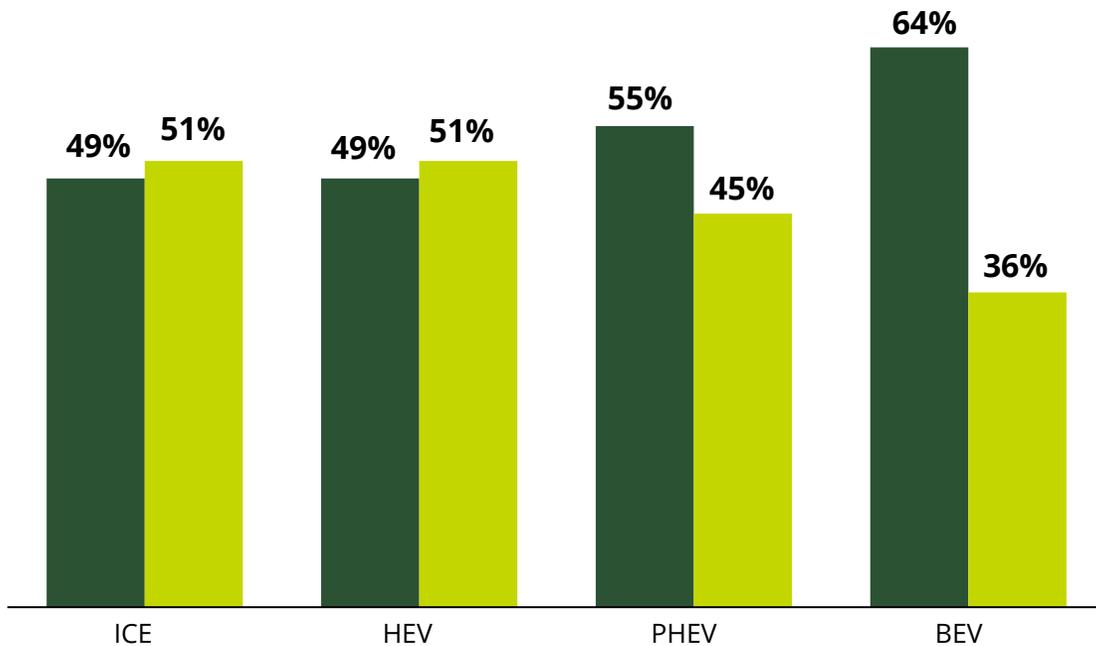
Q2. Please indicate the gender with which you identify; Q41. What type of engine would you prefer in your next vehicle?

Sample size: n = 104 [2026, BE]; 205 [2026, DE]; 155 [2026, UK]; 85 [2026, FR]; 97 [2026, NL]; 98 [2026, IT]; 66 [2026, ES]

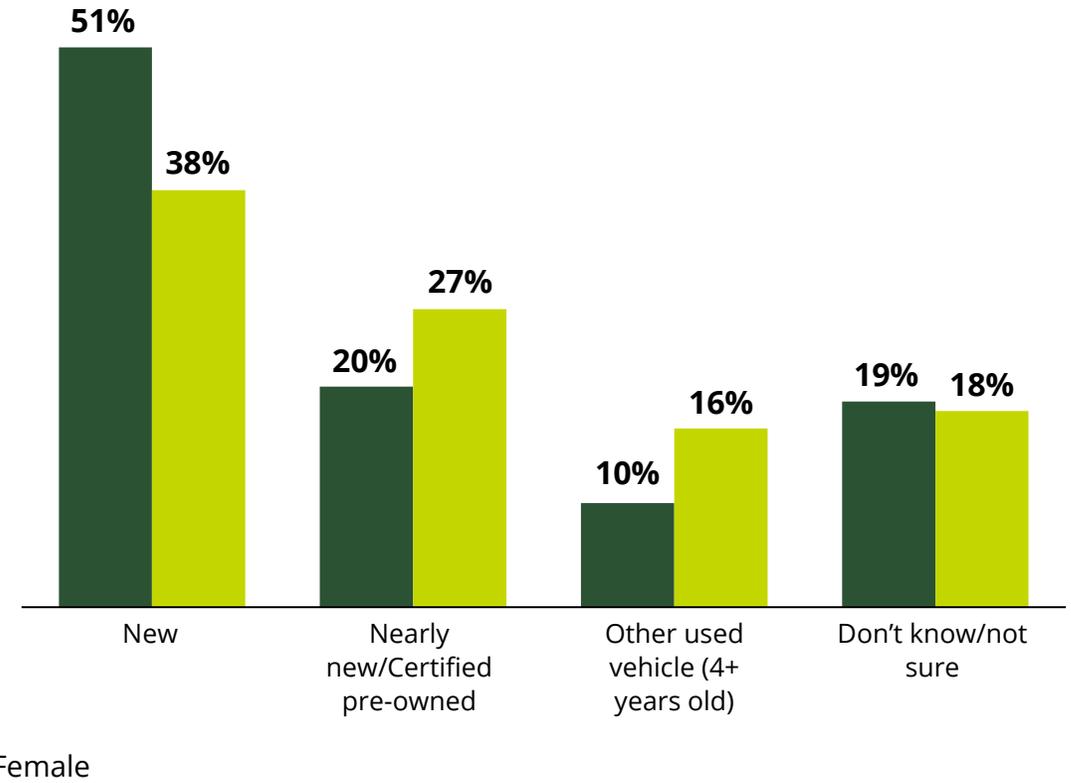
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Male and female consumers are as likely to choose non-BEV powertrains, but female consumers are more inclined to utilise the second-hand market for their next vehicle

Preference for next vehicle powertrain



Preference for next vehicle status



Male Female

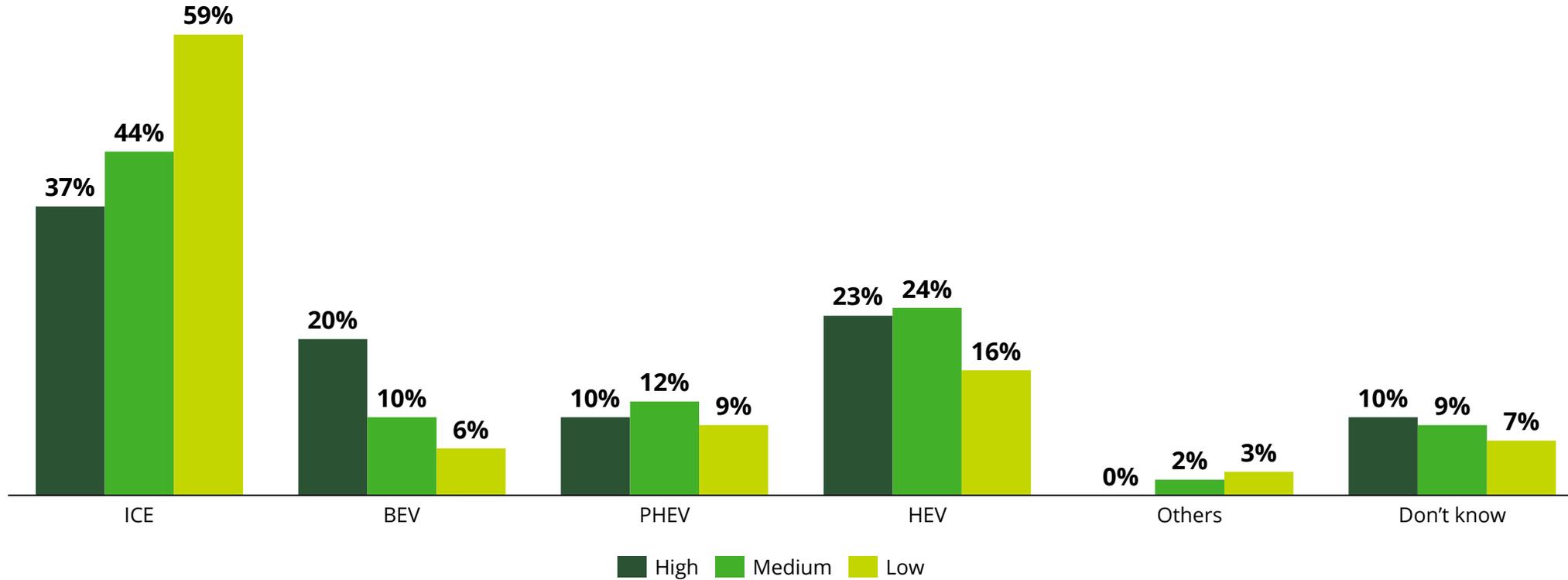
Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.
Q41. What type of engine would you prefer in your next vehicle?; Q24. Will your next vehicle be new or used?

Sample size: Q41. n = 878 [2026, BE]; Q24. n = 883 [2026, BE]

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Lower-income groups are at risk of being left behind in the BEV transition

Preference for type of engine based on income group



Note: "Other" includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; Percentages may not total 100% due to multiple responses, rounding, or excluded values.

Q41. What type of engine would you prefer in your next vehicle?; Q73. What is your approximate net total annual household income (i.e., after taxes)?

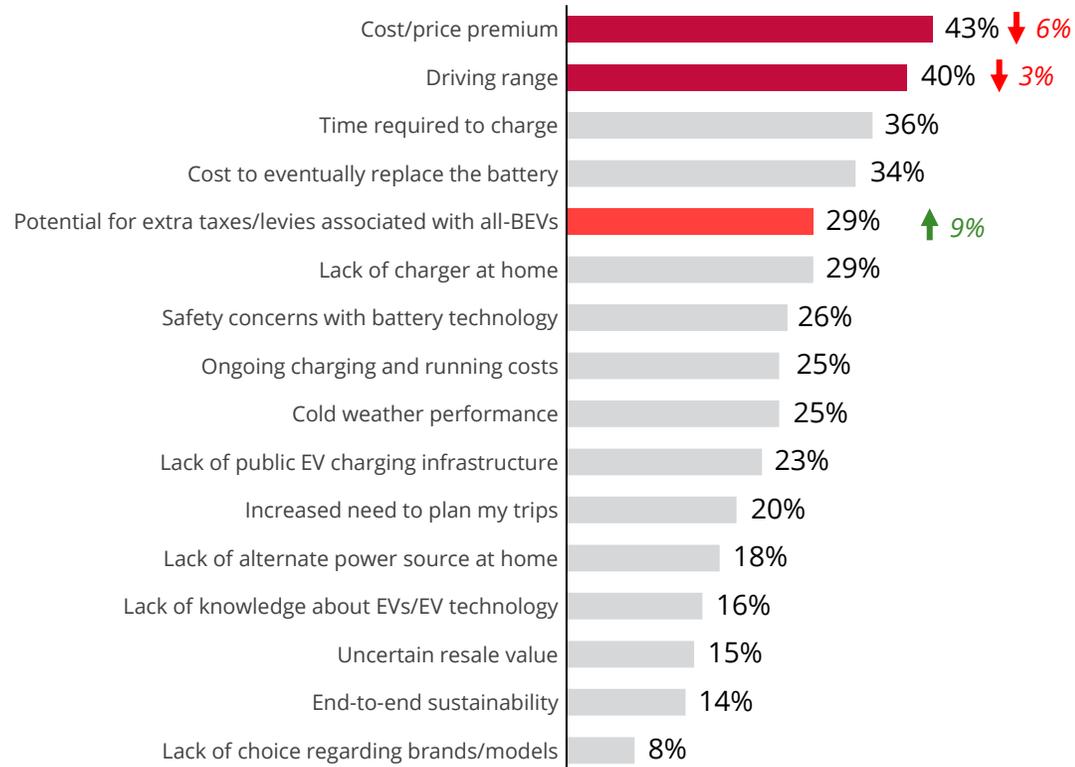
Sample size: n = 762 [2026, BE]

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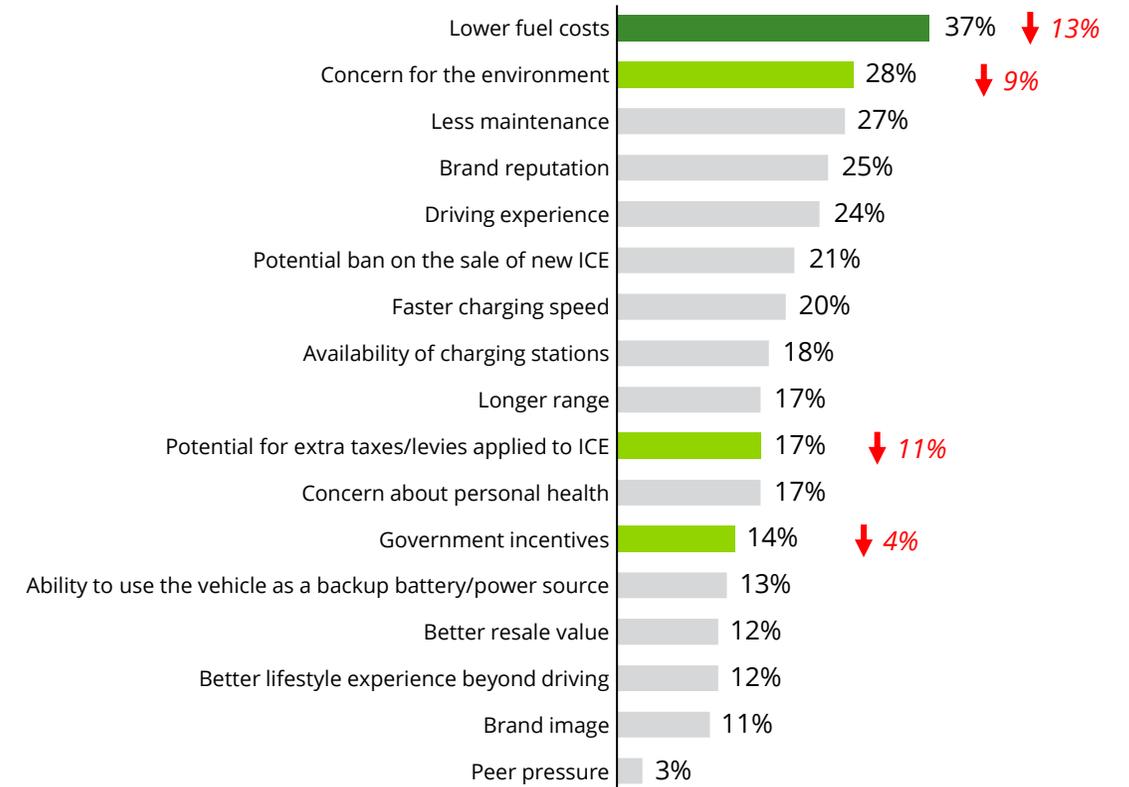
Cost and range remain key concerns, while government taxes and incentives are increasingly viewed as barriers and environmental motivations are fading



Greatest concerns regarding all battery-powered electric vehicles



Greatest drivers regarding all battery-powered electric vehicles



↓ ↑ Change compared to 2025 (in %)

■ Biggest concern/driver

■ Significant changes compared to 2025

Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

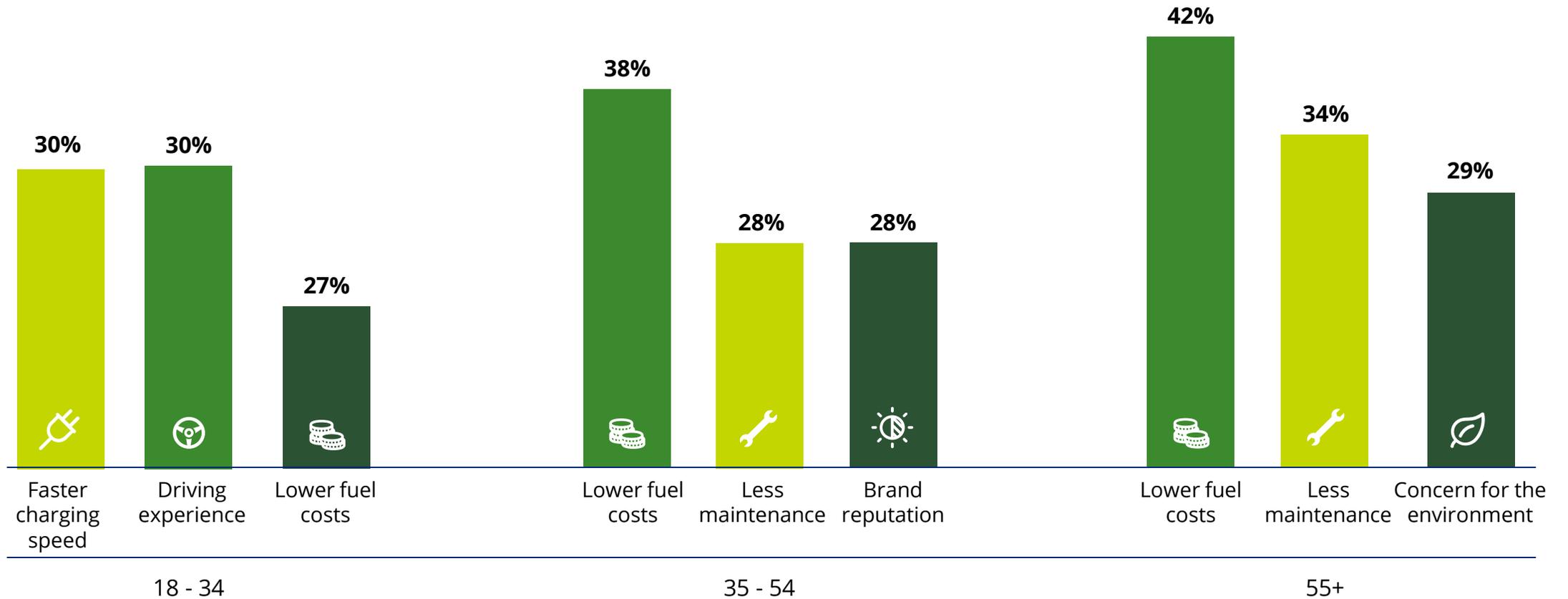
Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? (Please select all that apply.); Q48: What are your biggest concerns regarding all battery-powered electric vehicles? (Please select all that apply.)

Sample size: Q42. n = 374 [2026, BE]; Q48. n = 878 [2026, BE]

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Cost is still a key driver of EV adoption, but priorities vary across age groups

Top three most important decision factors for choosing an EV



Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values

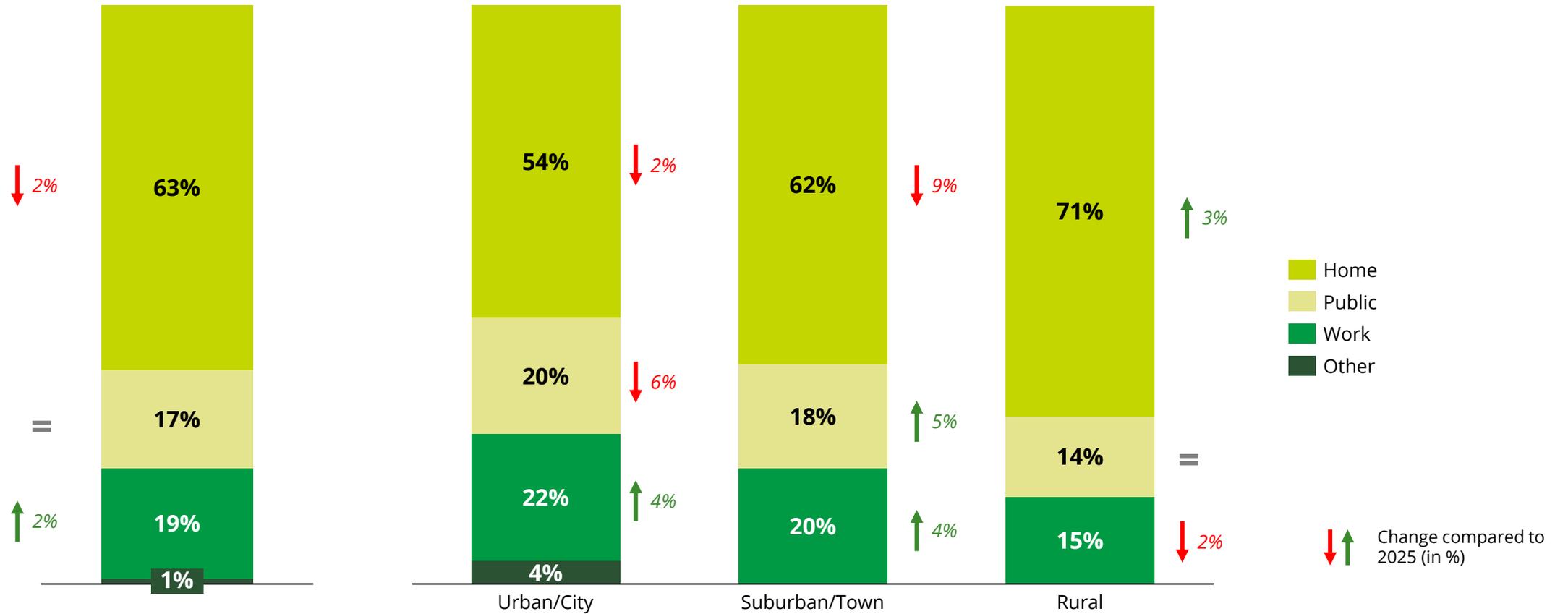
Q42. Which of the following factors have had the greatest impact on your decision to acquire an EV? (Please select all that apply.)

Sample size: n = 374 [2026, BE]

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Home charging remains the preferred private option, declining in (sub)urban areas but rising in rural homes

Where consumers expect to charge their EV most often



Q43. Where do you expect to charge your EV most often?

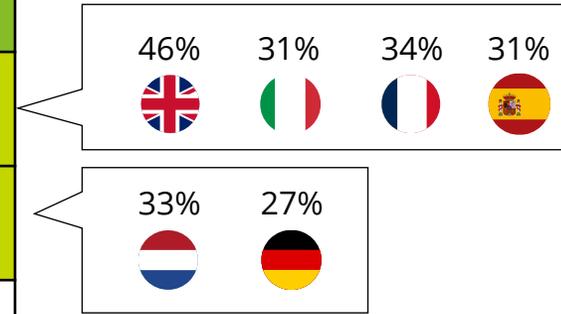
Sample size: Q43. n = 192 [2026, BE]

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Public charging behaviour differs greatly based on where Belgians live, but on average they prefer dedicated EV charging stations or EV chargers located at a traditional gas station

Preference for public EV charging location

Public places	Urban	Suburban	Rural	
Dedicated EV charging station	22%	24%	17%	21%
Traditional gas station with EV chargers	19%	20%	25%	21%
Retail outlet/mall	17%	17%	24%	19%
On-street parking	26%	17%	5%	15%
Parking lot	7%	11%	19%	13%
Community/public building	6%	6%	5%	5%
Vehicle dealership	2%	5%	3%	3%



 Top two preferred locations

Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.
Q45. Where would you most want to charge your EV when you are away from home?

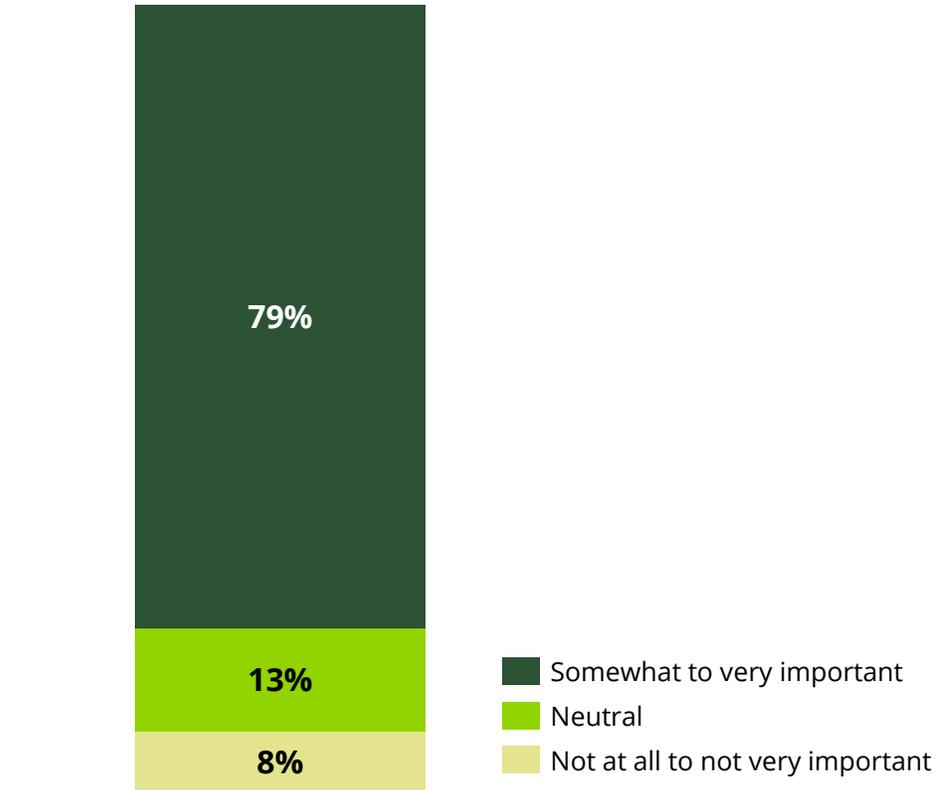
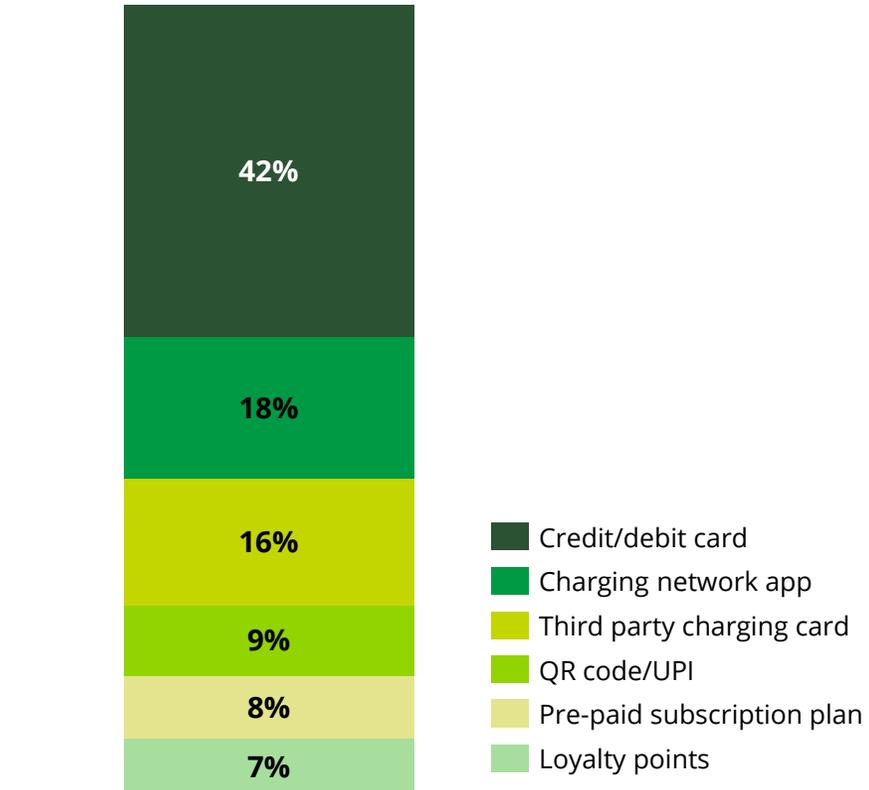
Sample size: n= 183 [2026, BE]; 327 [2026, DE]; 307 [2026, UK]; 188 [2026, FR]; 205 [2026, NL]; 248 [2026, IT]; 222 [2026, ES]

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For public charging, credit and debit cards are the preferred payment methods; 4 in 5 find cost important when choosing charging locations

How consumers prefer to pay for public charging

Importance of charging cost when choosing a public charging location



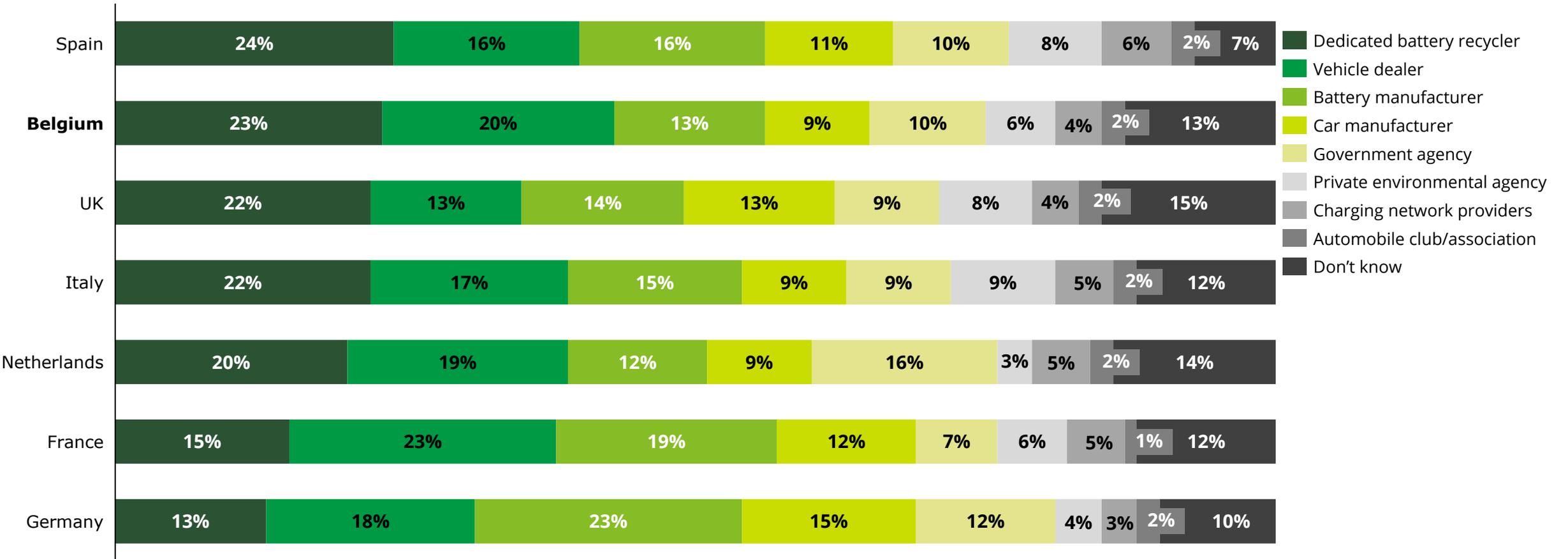
Q46. How important is charging cost when it comes to choosing a public location to charge your vehicle?; Q47. How would you most prefer to pay for public EV charging?

Sample size: Q46. n = 192 [2026, BE]; Q47. n = 254 [2026, BE]

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Belgians believe that dedicated battery recyclers should be responsible for the afterlife of batteries, with vehicle dealers and battery manufacturers also being popular choices

Consumer preference for entity responsible for collecting, storing, and recycling EV batteries after their useful lives



Q49. Who do you think should be responsible for collecting, storing, and recycling electric vehicle batteries after their useful lives?

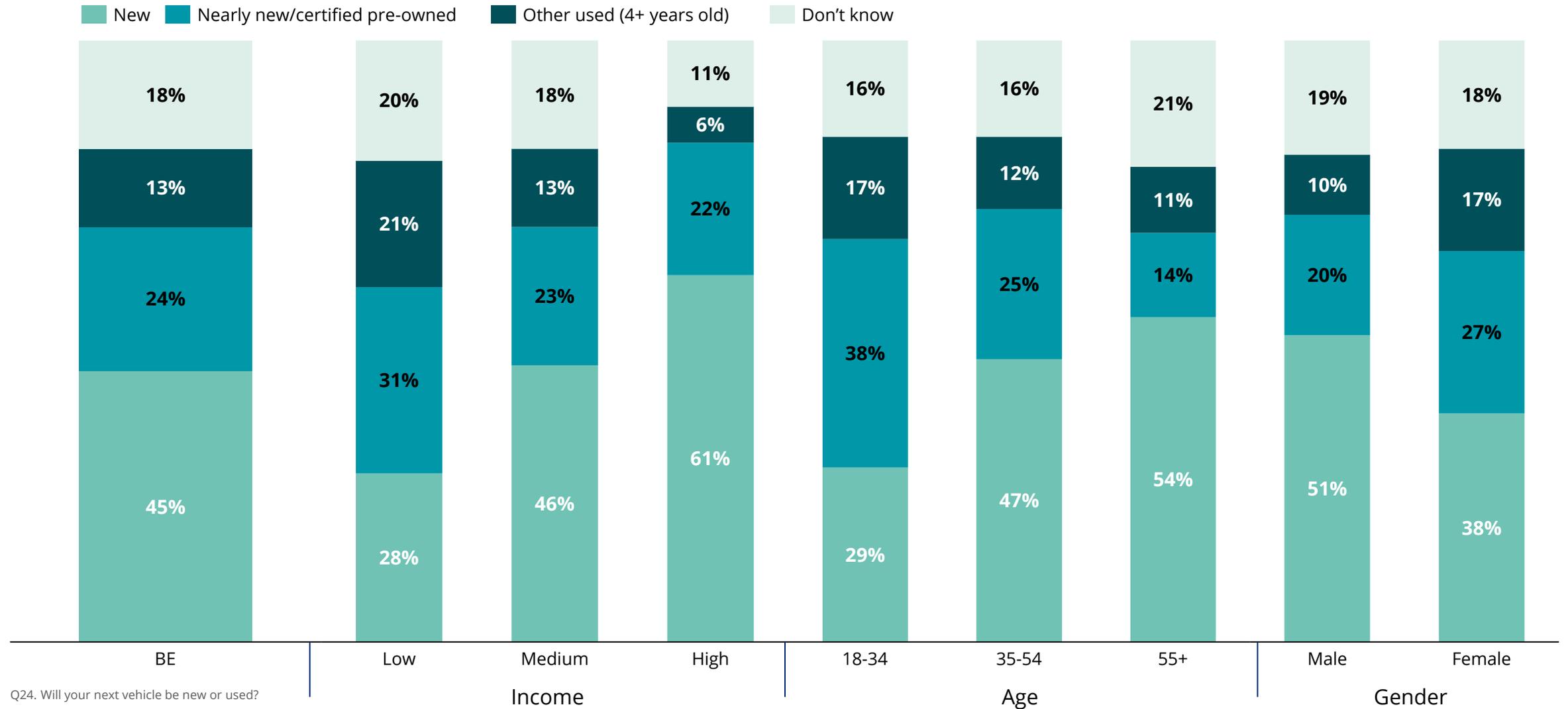
Sample size: n= 864 [2025, ES]; 878 [2025, BE]; 1,363 [2025, UK]; 909 [2025, IT]; 910 [2025, NL]; 832 [2025, FR]; 1,280 [2025, DE];

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2 Future vehicle intentions



Younger and lower-income consumers are more likely to turn to the second-hand market with the “nearly new/certified pre-owned” segment being preferred



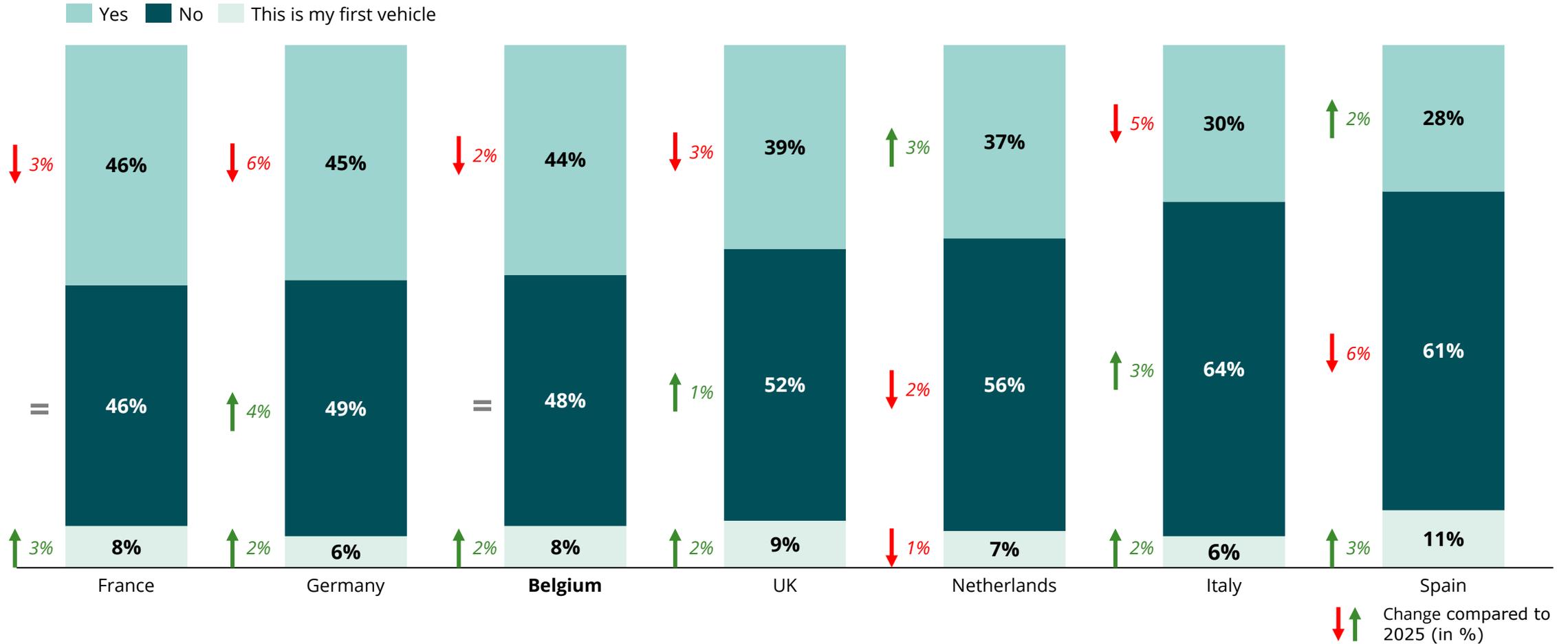
Q24. Will your next vehicle be new or used?

Sample size: n = 883 [2026, BE]

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About half of Belgian consumers have switched brand as compared to their previous vehicle

Percentage of consumers whose prior vehicle was from the same brand as current vehicle



Q9. Was your prior vehicle from the same brand?

Sample size: n= 585 [2026, FR]; 1,119 [2026, DE]; 695 [2026, BE]; 1,144 [2026, UK]; 780 [2026, NL]; 627 [2026, IT]; 798 [2026, ES]

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Product quality and price are the leading drivers of brand choice, while factors such as advertising, brand affiliations, and easy financing remain less influential

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice							
Product quality	51%	50%	60%	53%	49%	51%	53%
Price	51%	54%	52%	52%	52%	49%	37%
Vehicle performance (e.g., fuel efficiency, battery range)	29%	34%	54%	32%	34%	38%	40%
Brand familiarity	26%	39%	35%	38%	21%	27%	29%
Vehicle features/technology	25%	30%	37%	29%	25%	33%	35%
Quality of overall ownership experience	24%	38%	37%	19%	28%	21%	22%
Previous service experience	21%	20%	19%	18%	19%	14%	16%
Vehicle service and maintenance network	18%	20%	26%	22%	14%	20%	17%
Previous sales experience	16%	26%	12%	14%	19%	11%	10%
Brand image	16%	14%	20%	21%	12%	16%	19%
Availability of battery electric vehicles/hybrid options	12%	14%	20%	14%	12%	17%	16%
Easy financing options	8%	12%	17%	13%	5%	12%	12%
Brand advertising	6%	3%	7%	8%	4%	7%	7%
Brand affiliations (e.g., sponsorships, partners)	5%	5%	6%	4%	4%	5%	6%

 Most commonly cited

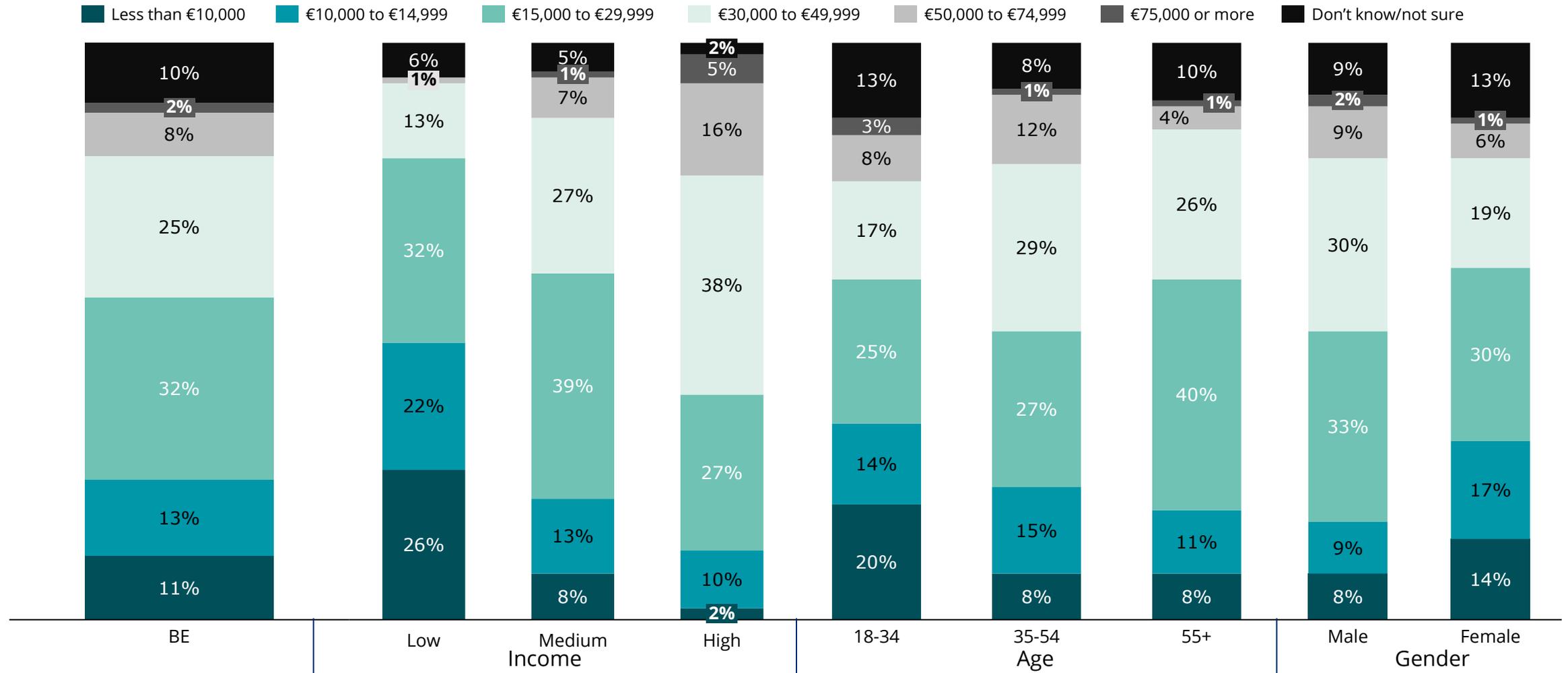
Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

Q29. What are the most important factors driving the choice of brand for your next vehicle? Please select all that apply.

Sample size: n = 1,280 [2026, DE]; 878 [2026, BE]; 910 [2026, NL]; 909 [2026, IT]; 1,363 [2026, UK]; 832 [2026, FR]; 864 [2026, ES]

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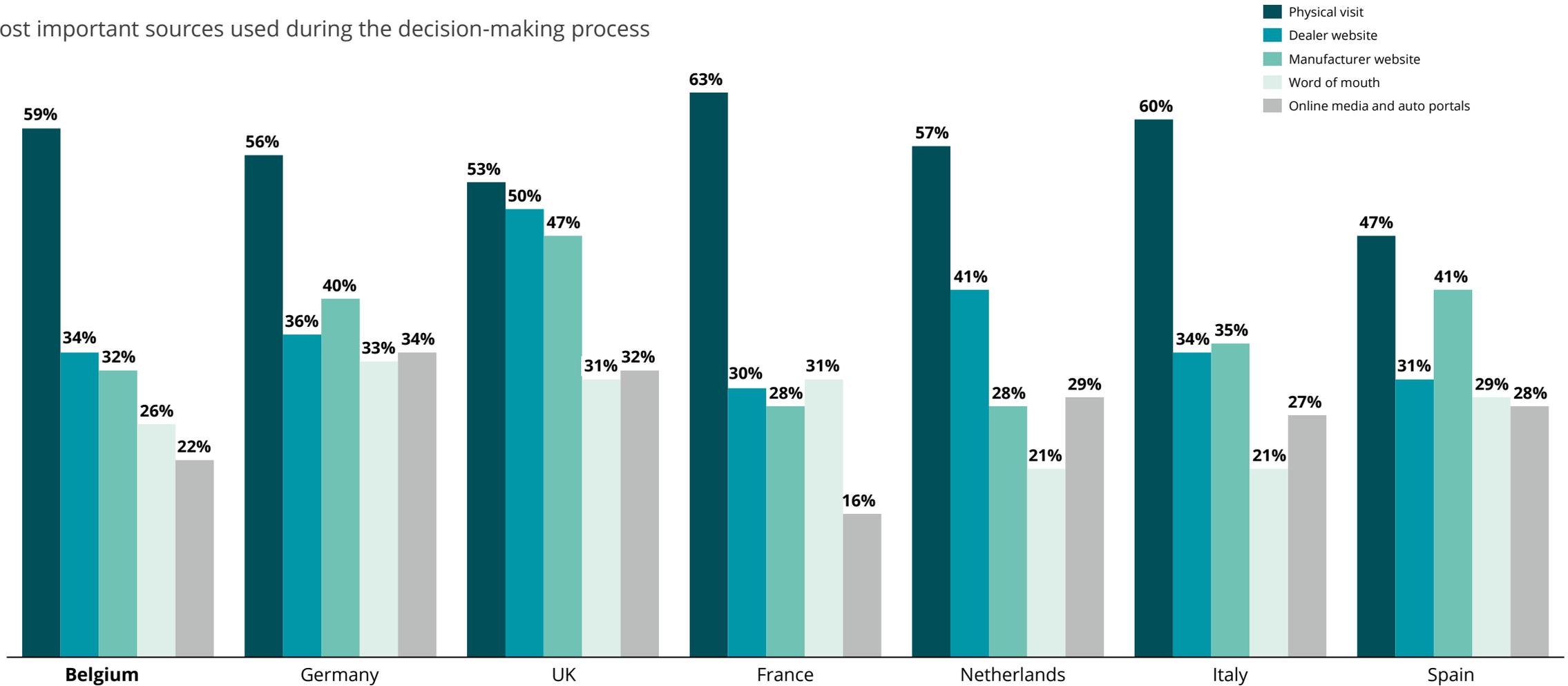
More than half expect to pay €15,000-€49,999, but younger generations are looking for cheaper options



Q31. In which of the following price ranges will you be shopping for your next vehicle? (Please indicate what you would expect to pay after any discounts and/or incentives that might be available).
 Sample size: n = 878 [2026, BE]

A physical visit remains the most important for information gathering

Most important sources used during the decision-making process



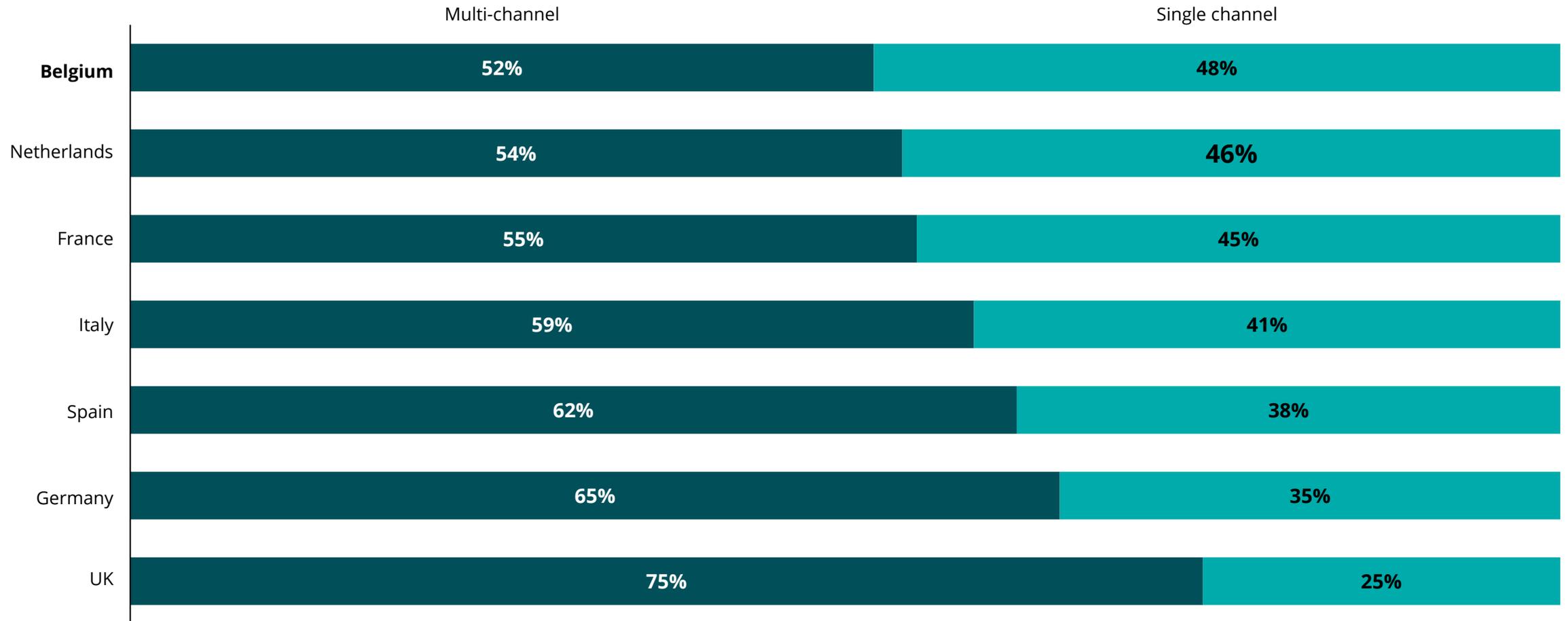
Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.
Q30. Which of the following sources would you use to gather information about your next vehicle? (Please select all that apply.)

Sample size: n = 1,280 [2026, DE]; 878 [2026, BE]; 910 [2026, NL]; 909 [2026, IT]; 1,363 [2026, UK]; 832 [2026, FR]; 864 [2026, ES]

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Belgian consumers are still heavily reliant on a single channel of information

Most important sources used during the decision-making process



Q30. Which of the following sources would you use to gather information about your next vehicle? (Please select all that apply.)

Sample size: n = 1,280 [2026, DE]; 878 [2026, BE]; 910 [2026, NL]; 909 [2026, IT]; 1,363 [2026, UK]; 832 [2026, FR]; 864 [2026, ES]

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Value for money and transparent pricing are important to Belgians

Top three most important aspects of next vehicle purchase experience

Aspects of vehicle purchase experience							
Getting a good deal	54%	62%	64%	41%	64%	40%	37%
Transparent pricing	49%	33%	44%	41%	52%	59%	56%
Getting all questions answered	34%	30%	28%	40%	30%	29%	36%
Physical interaction with the vehicle	33%	34%	45%	33%	38%	28%	33%
Building trust in the salesperson	29%	23%	14%	29%	26%	30%	23%

 Top 3 most important aspects

Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

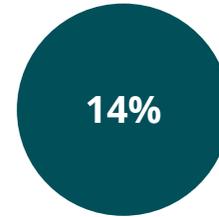
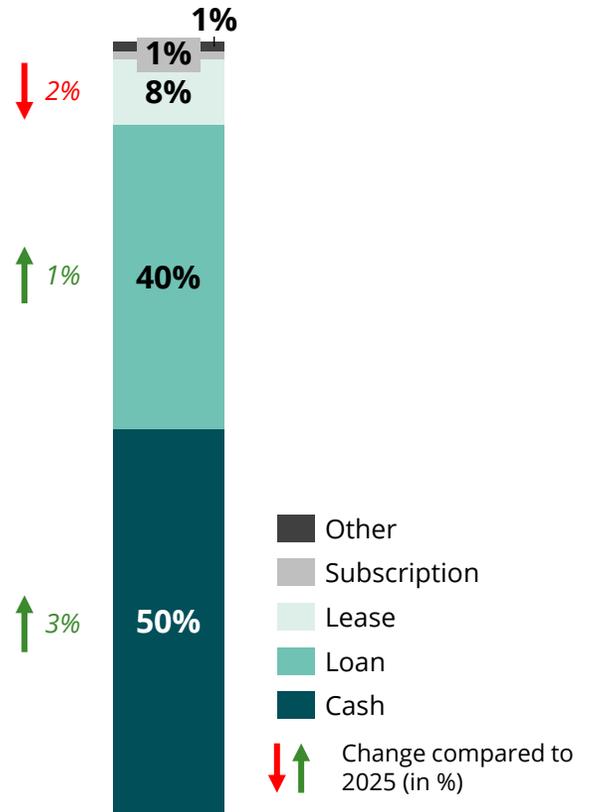
Q51. What are the top three most important aspects of your next vehicle purchase experience? (Please select top three.)

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]

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The preference for cash and loans persists, but there are interesting niches

Preferred method of payment for next vehicle purchase



of **younger drivers** prefer a **lease** or **subscription** (more than any other demographic)



of those looking for a **used car** prefer a **lease** or **subscription** (double that who are interested in new cars)



of those looking for a **BEV** prefer a **lease** or **subscription**

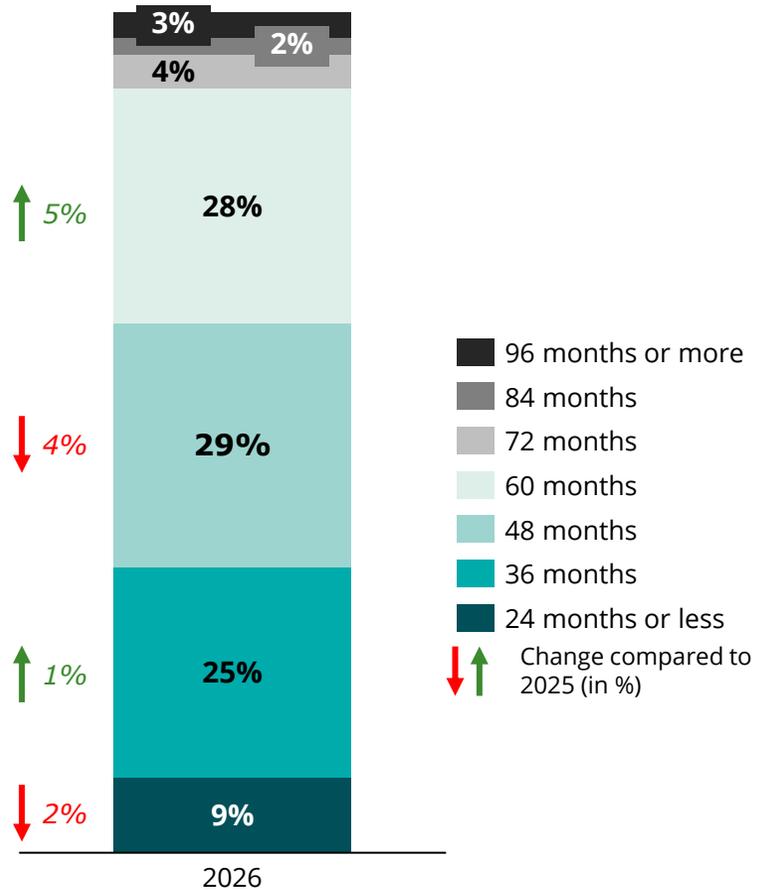
Q33. How do you intend to acquire your next vehicle?

Sample size: n = 838 [2026, BE]

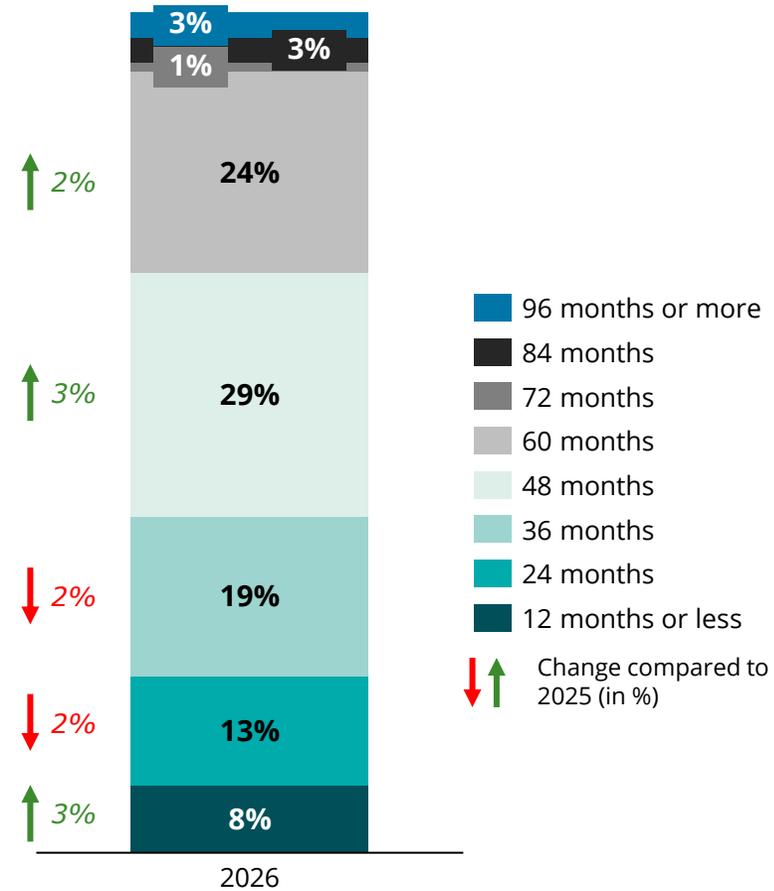
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Preferred loan and lease duration have increased

Preferred loan duration (in months)



Preferred lease duration (in months)



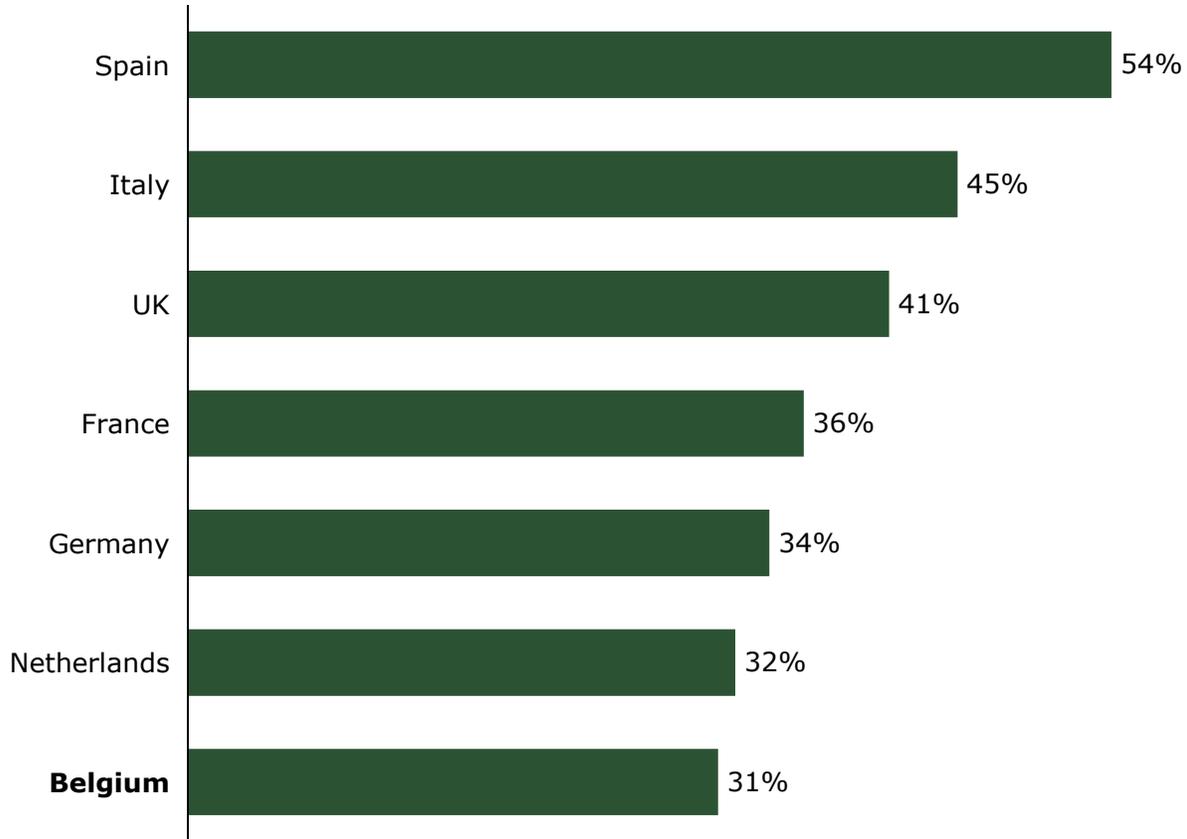
Q34. What is your preferred loan duration (in months)?; Q35. What is your preferred lease duration (in months)?

Sample size: Q34. n = 331 [2026, BE]; Q35. n = 70 [2026, BE]

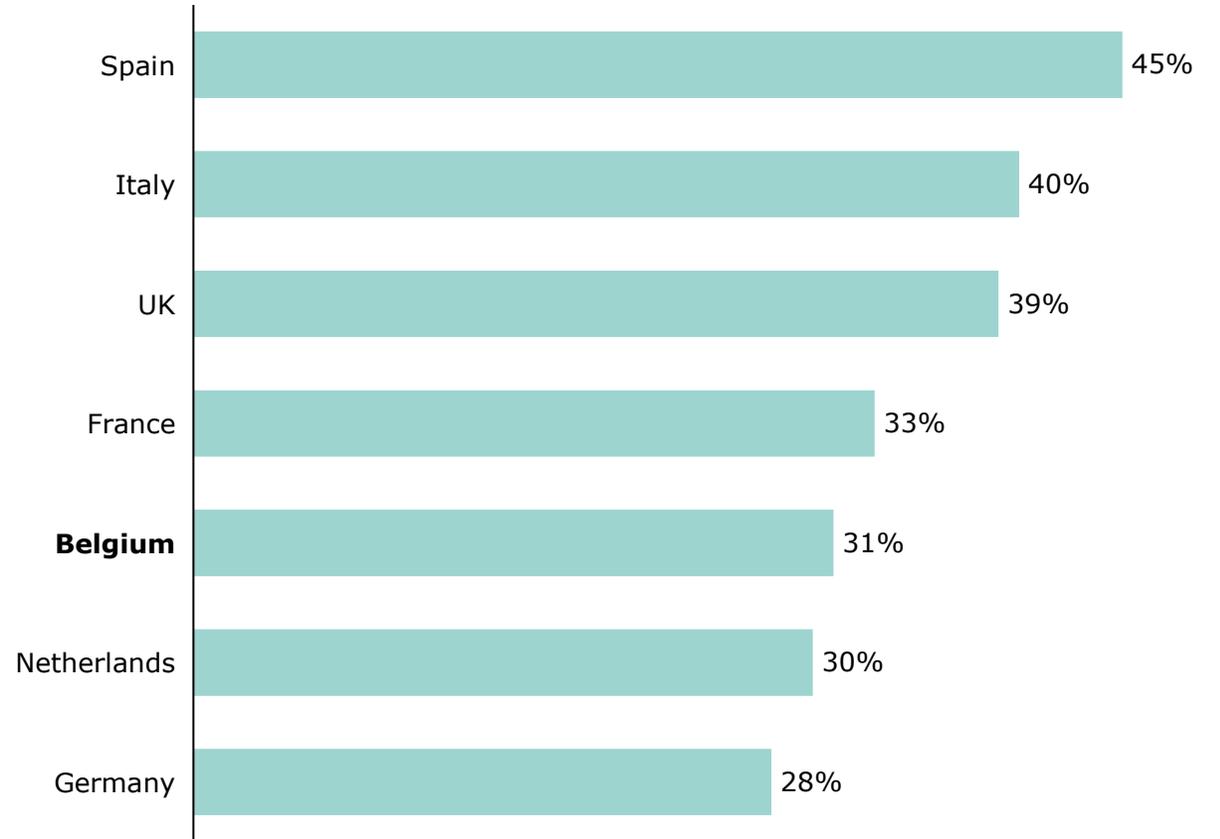
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Fewer Belgians are interested in direct-to-consumer models than their European peers

Percentage of surveyed consumers who would be interested in acquiring a **vehicle directly from the manufacturer** (% somewhat/very interested)



Percentage of surveyed consumers who would be interested in purchasing **insurance directly from the manufacturer** (% somewhat/very interested)



Q39. The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q40. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)?

Sample size: n = 1,280 [2026, DE]; 878 [2026, BE]; 910 [2026, NL]; 909 [2026, IT]; 1,363 [2026, UK]; 832 [2026, FR]; 864 [2026, ES]

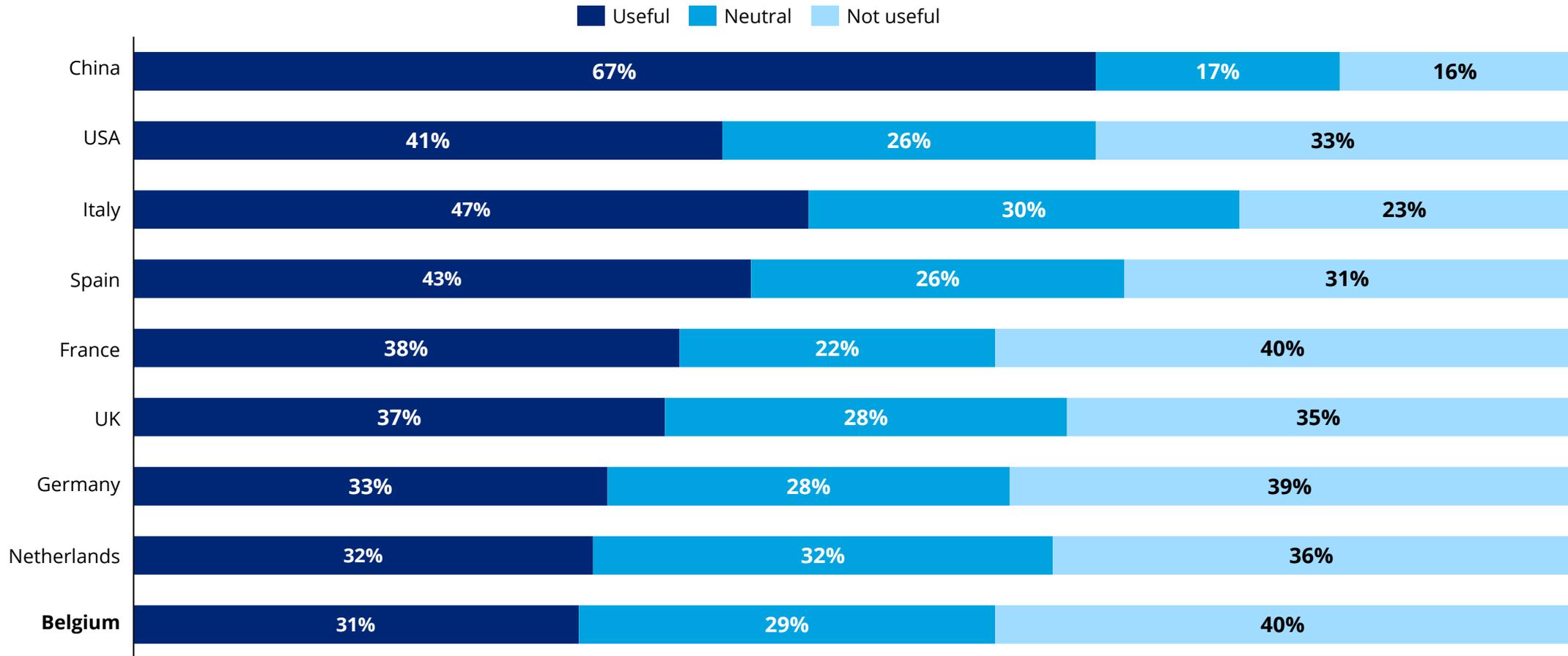
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3 Software defined vehicles



Belgian consumers are less interested in their next vehicle allowing customisation and feature expansion throughout the vehicle lifecycle than their peers

Perceived usefulness of software-defined vehicles



Note: Percentages may not total 100% due to rounding; "Not useful" is the sum of not at all useful, slightly useful, and somewhat useful while "useful" is the sum of useful, very useful, and extremely useful.

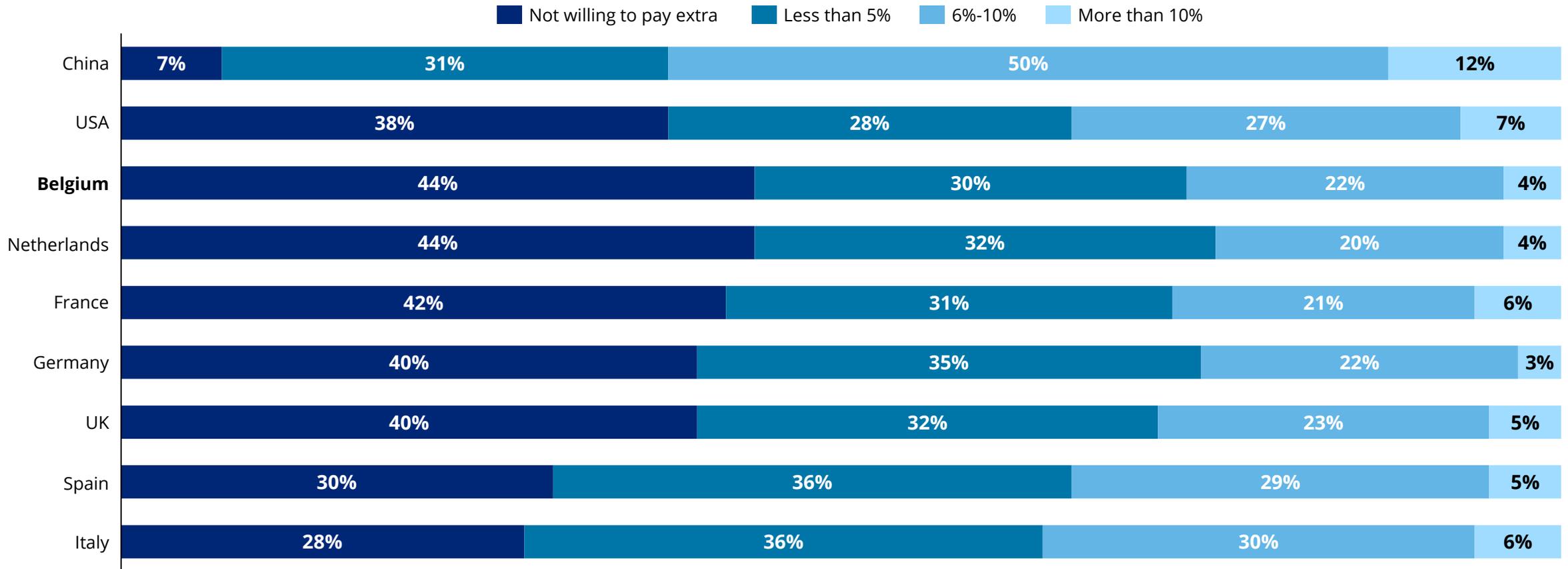
Q55. Software-defined vehicles allow customization and feature expansion not only before purchase, but throughout the vehicle's life cycle. How useful do you find the idea of your next vehicle being primarily software-defined?

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 859 [2026, CN]; 944 [2026, US]

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More than half of Belgians are willing to pay for over-the-air update capability if it eliminates the need for workshop visits, yet fewer than in other countries

Willingness to pay above vehicle list price for OTA-update capability



Note: Percentages may not total 100% due to rounding.

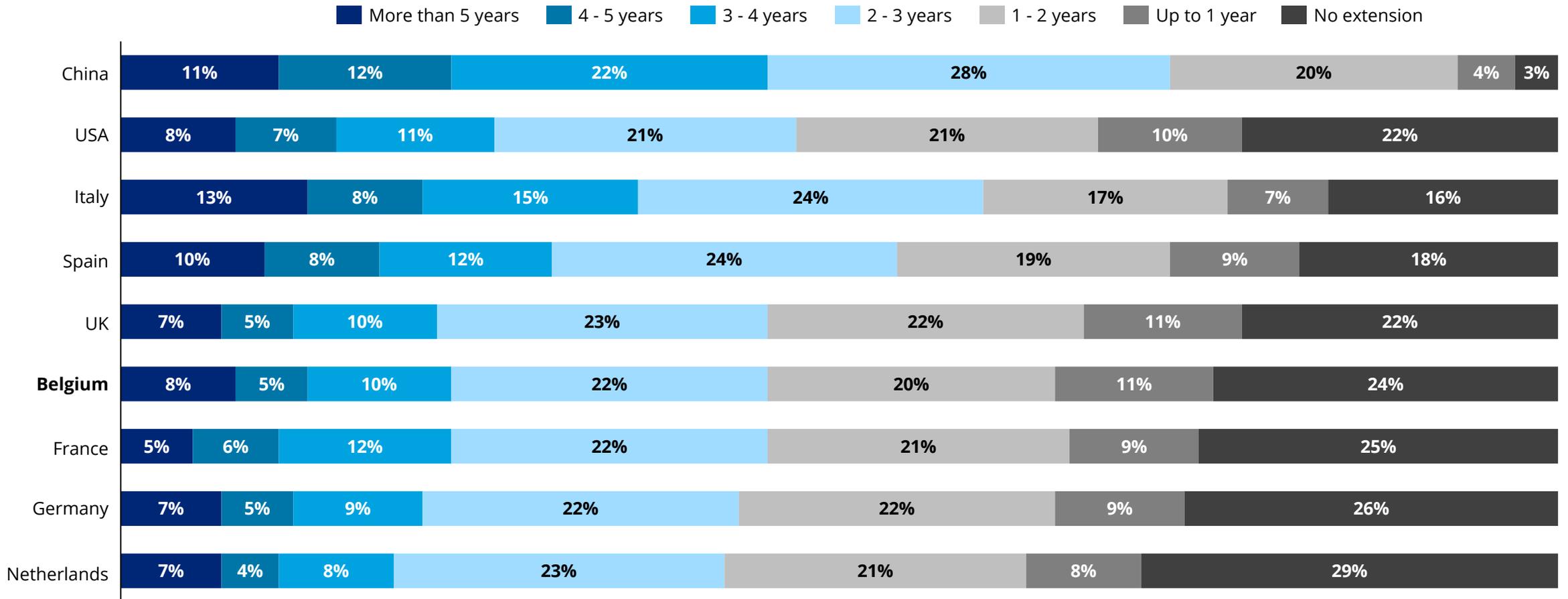
Q56. Over-the-air (OTA) software updates downloaded directly to a vehicle can eliminate the need for workshop visits. How much more would you be willing to pay for a vehicle that includes automated OTA updates versus a traditional vehicle requiring workshop visits? Please indicate the amount as a percentage above the vehicle's list price.

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 859 [2026, CN]; 944 [2026, US]

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Around 2/3 of European consumers believe that OTA enhancements and connected services can increase the lifecycle of their vehicle by more than 1 year

Number of additional years consumers would keep their vehicle with over-the-air enhancements



Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

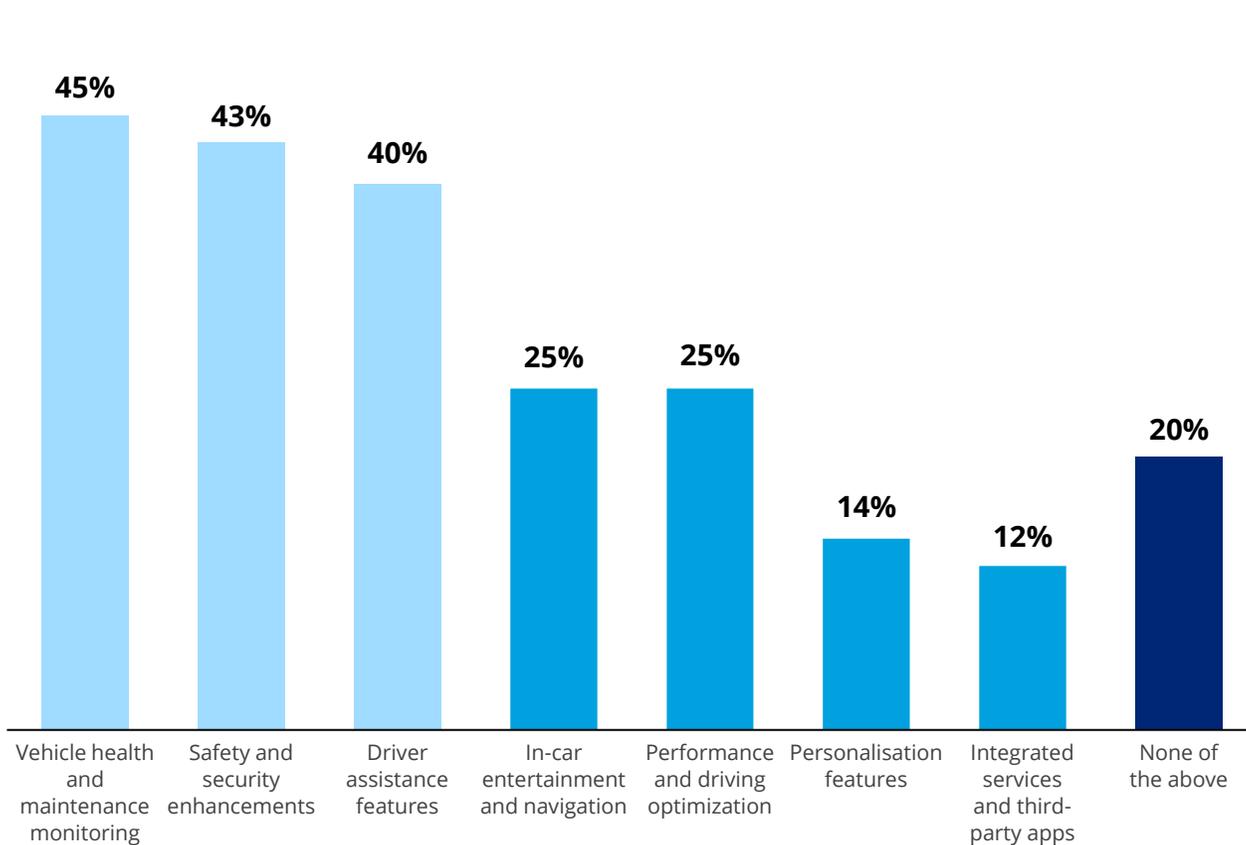
Q65. How much do you believe OTA updates and connected services can extend the total lifecycle of a vehicle across all owners?

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 617 [2026, CN]; 489 [2026, US]

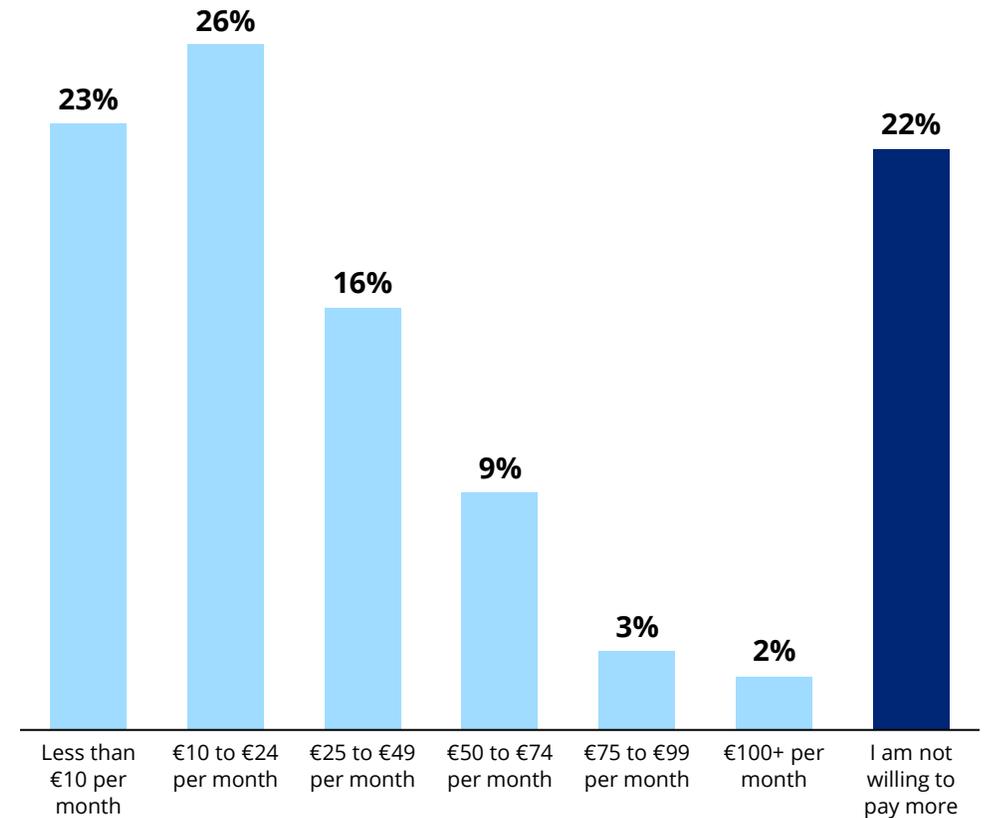
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Strongest interest in paying extra for vehicle health, safety, and assistance features

Most important features where consumers are willing to pay extra



How much they would be willing to pay extra per month (in total)



Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

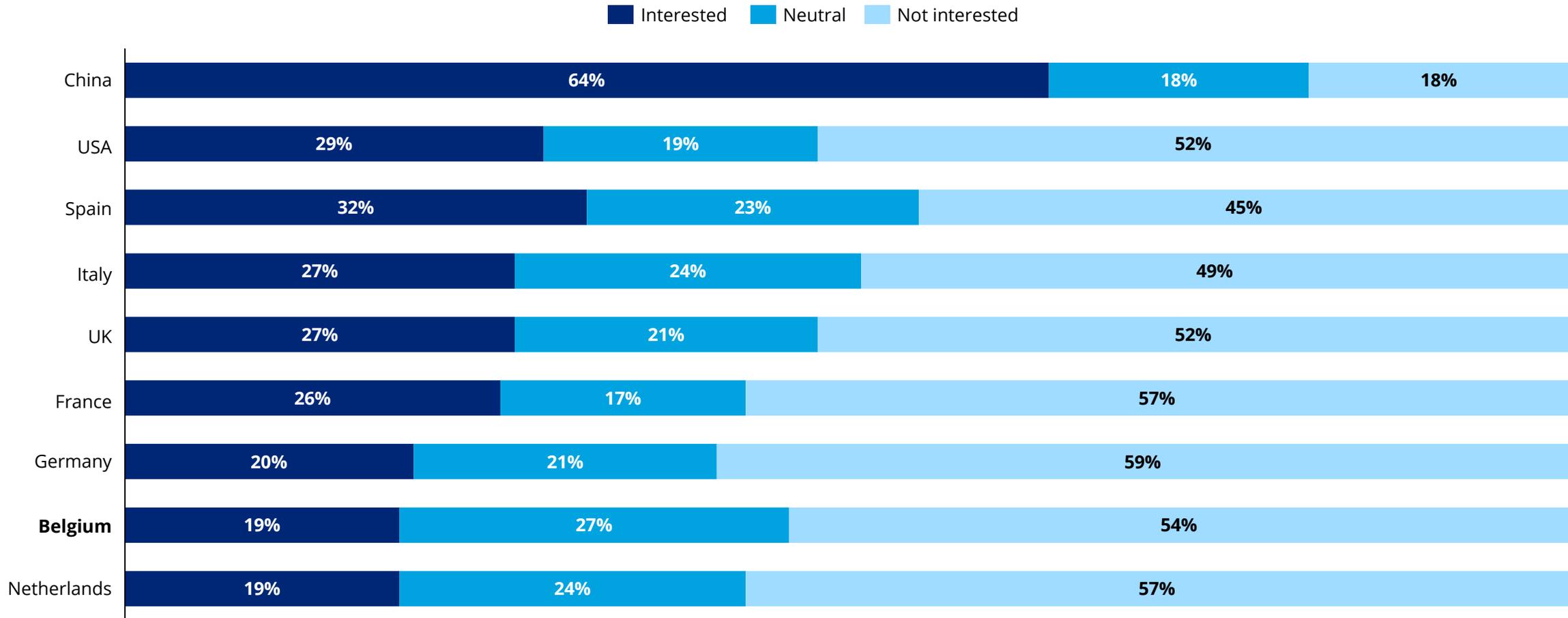
Q58. Which of the following software-defined features would you be willing to pay extra for in your next vehicle? (Please select all that apply.); Q59. How much would you be willing to pay for added software-defined vehicle features on a monthly basis?

Sample size: Q58. 878 [2026, BE]; Q59. 707 [2026, BE]

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Europeans remain largely uninterested in using their vehicles as platforms for integrated services

Consumer interest in using vehicles as platforms for integrated services



Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values; "Not interested" is the sum of not at all interested, slightly interested, and somewhat interested, while "Interested" is the sum of interested, very interested, and extremely interested.

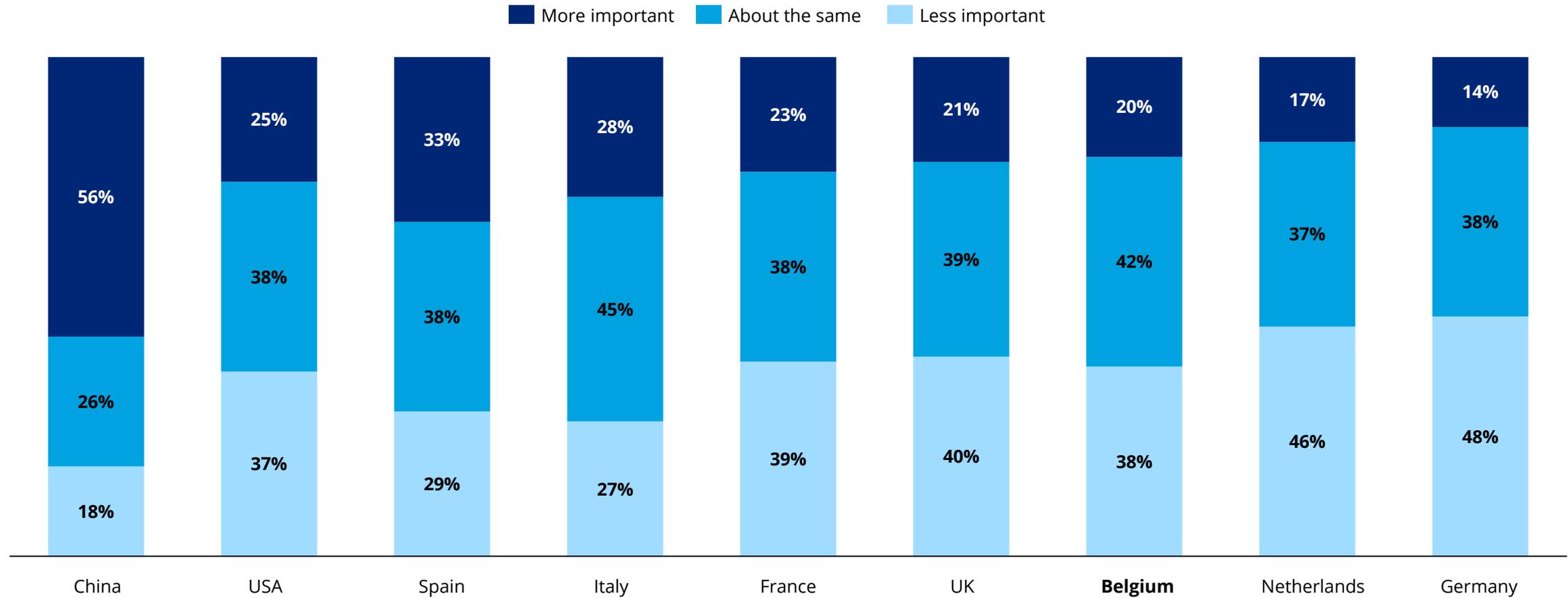
Q57. Software-defined vehicles can serve as platforms for services such as package delivery, grocery drop-off, valet parking, dynamic insurance pricing, or on-demand autonomous rides. How interested are you in using your vehicle to access such integrated services?

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 859 [2026, CN]; 944 [2026, US]

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Smartphone is the preferred ecosystem, but consumers have identified the importance of the complimentary in-vehicle ecosystem

Perceived importance of in-vehicle ecosystems compared with smartphones



Note: "Less important" is the sum of much less important, less important, and slightly less important, while "more important" is the sum of slightly more important, more important, and much more important.

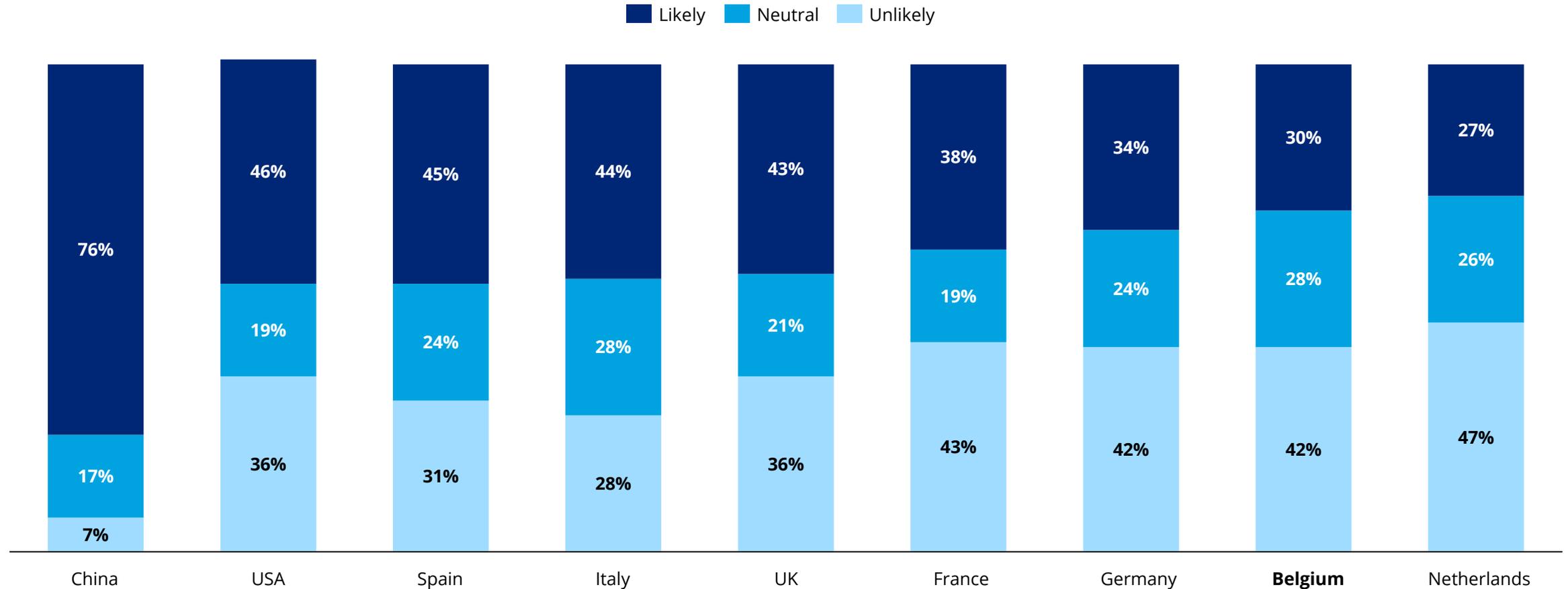
Q61. If an in-vehicle ecosystem offered features like advanced driving assistance, additional comfort functions, or integrated third-party services (e.g., insurance, repair shops), how would you compare its importance to that of your smartphone?

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 859 [2026, CN]; 944 [2026, US]

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Less than 1/3 of Belgians are likely to use AI-enabled vehicle customisation features, which is lower than their peers

Likelihood of using AI-enabled vehicle customisation features



Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values; "Unlikely" is the sum of very unlikely, unlikely, and slightly unlikely, while "Likely" is the sum of slightly likely, likely, and very likely.

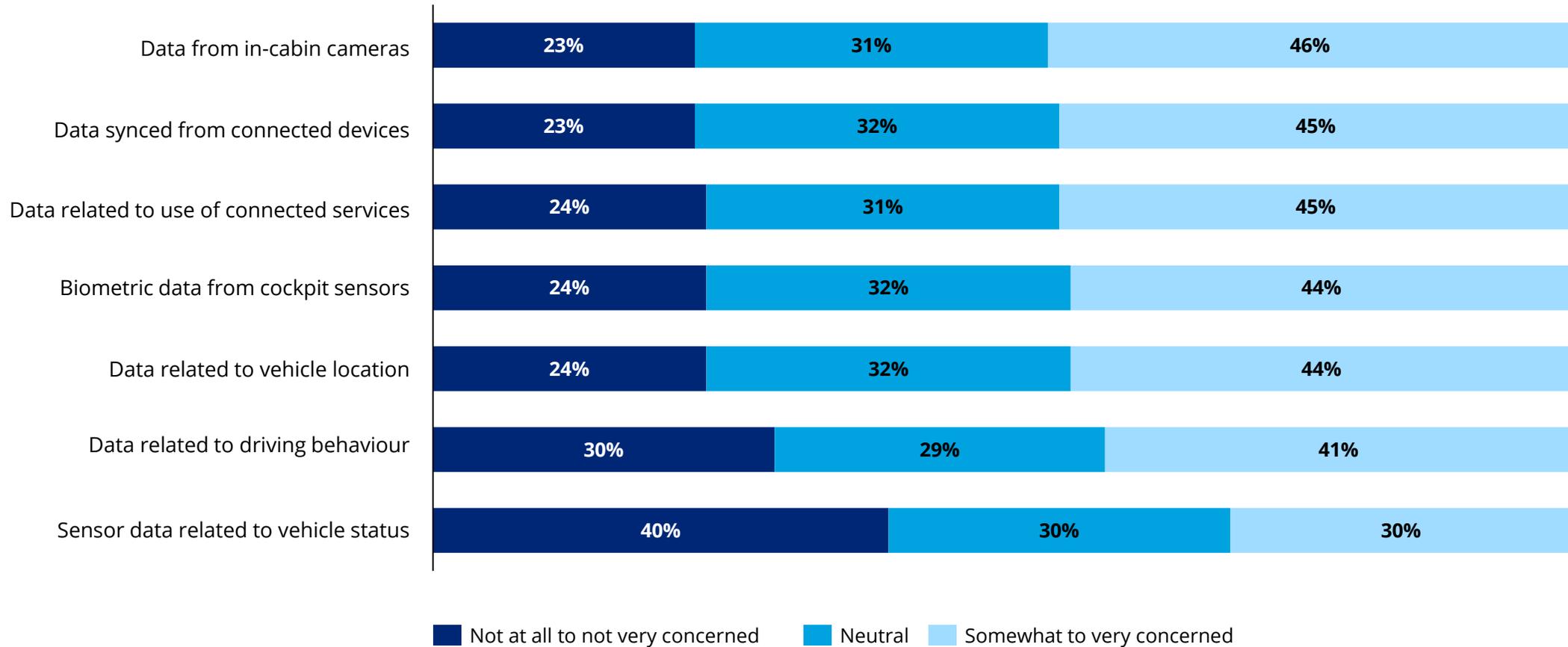
Q60. AI-enabled customization allows your vehicle to recognize and adapt to your preferences without manual input (e.g., adjusting climate settings, seat positions, cabin lighting). How likely would you be to use such AI-enabled features in your next vehicle?

Sample size: n = 878 [2026, BE]; 1,280 [2026, DE]; 1,363 [2026, UK]; 832 [2026, FR]; 910 [2026, NL]; 909 [2026, IT]; 864 [2026, ES]; 261 [2026, CN]; 944 [2026, US]

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Data-sharing is a concern, particularly as it relates to personal identifiable data

Areas of concern for consumers around the sharing of data with OEMs, insurance companies,...

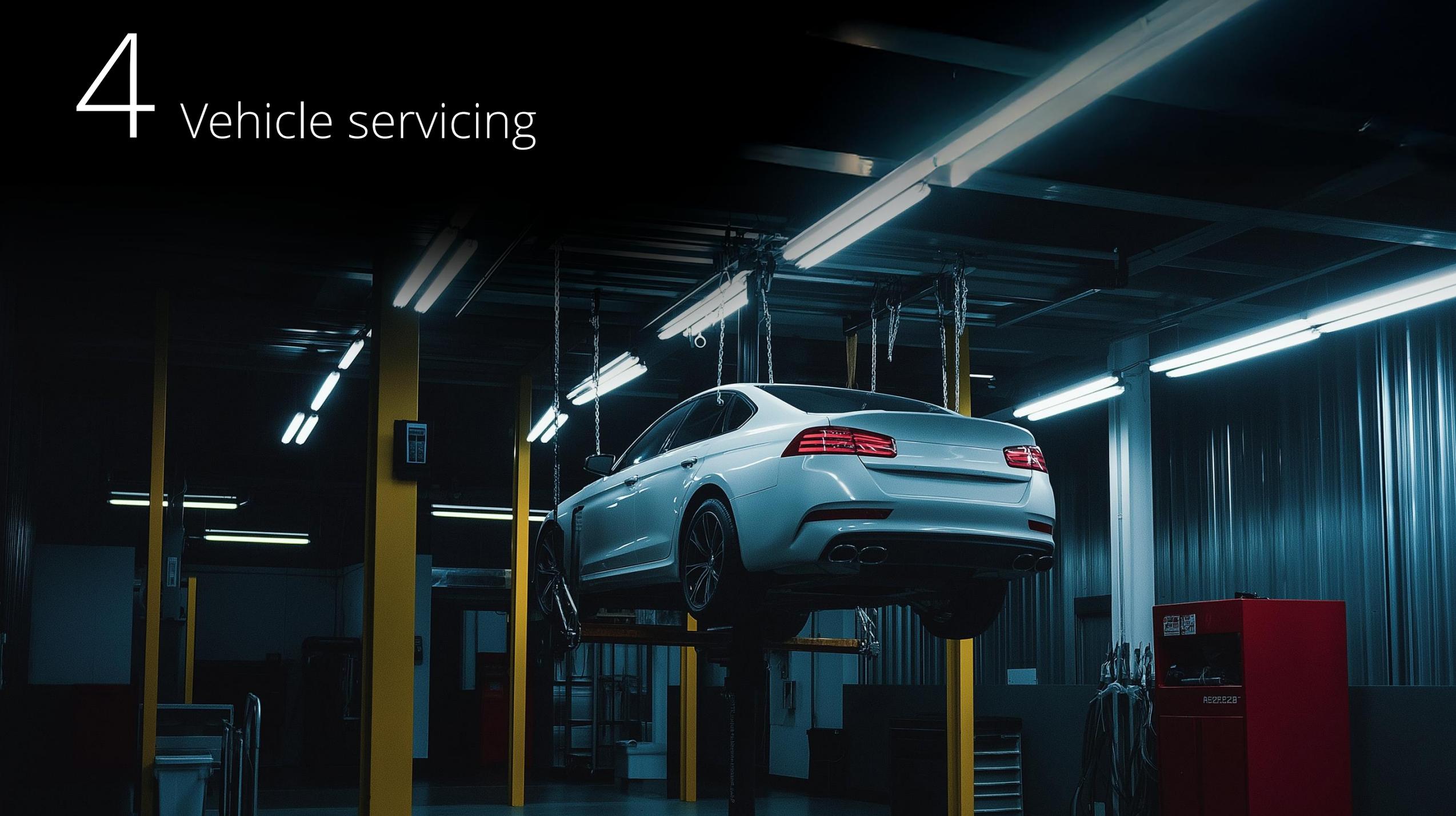


Q53. As vehicles become more and more connected to the internet, how concerned would you be if the following types of data were shared with your vehicle manufacturer, dealer, insurance company and/or other third parties?

Sample size: 878 [2026, BE]

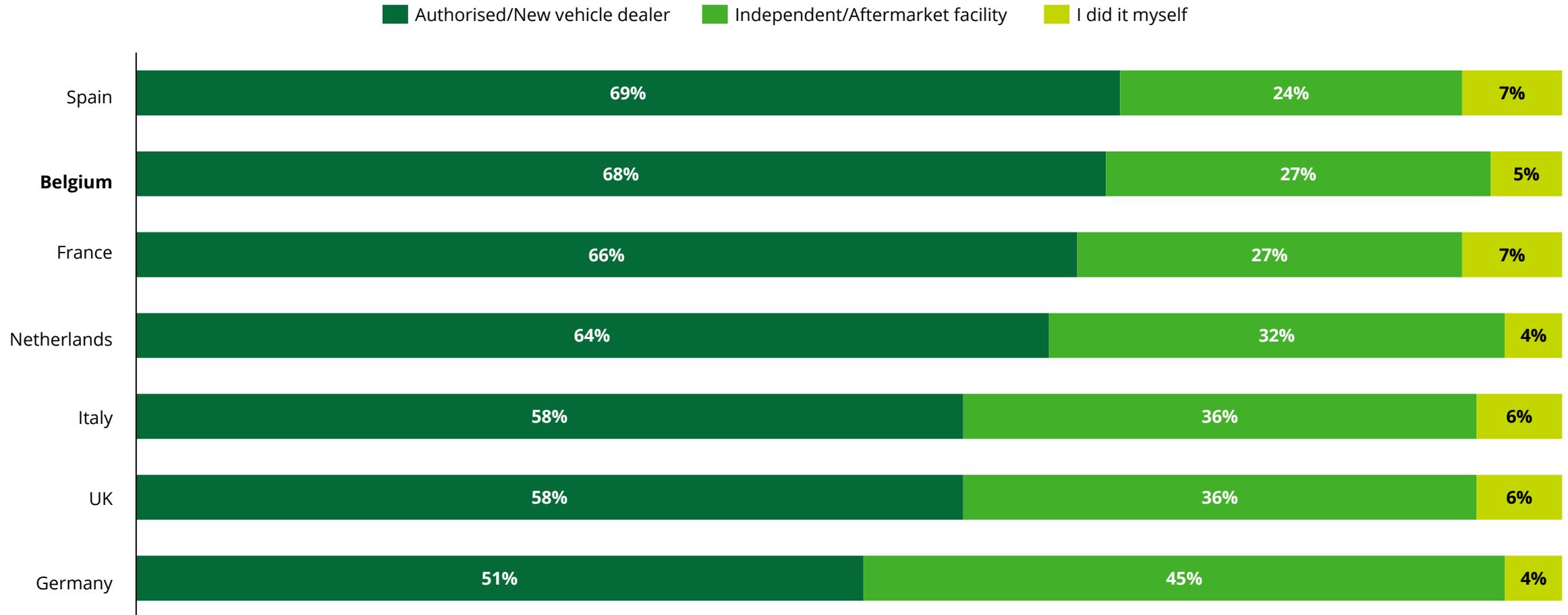
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4 Vehicle servicing



European consumers still strongly prefer authorised/new vehicle dealers to service their vehicles

Most recent vehicle service experience by type of facility



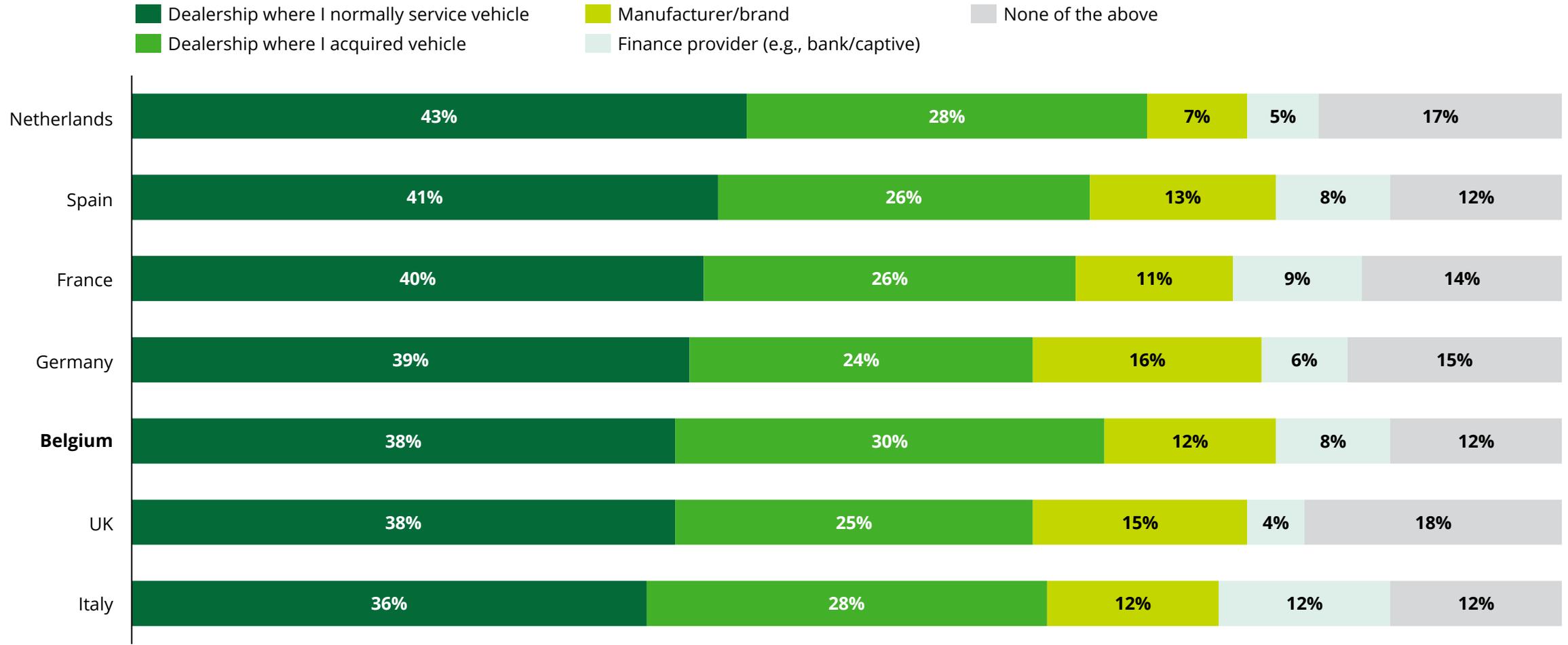
Q16. Where was your most recent vehicle service experience?

Sample size: n= 790 [2026, ES]; 675 [2026, BE]; 576 [2026, FR]; 767 [2026, NL]; 622 [2026, IT]; 1,129 [2026, UK]; 1,113 [2026, DE]

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Europeans place the highest trust in the dealership where they regularly service their vehicle, underscoring the influence of ongoing service interactions in shaping long-term customer relationships

Who do vehicle owners most trust?



Q22. With whom do you have the most trusted relationship?

Sample size: n= 780 [2026, NL]; 798 [2026, ES]; 585 [2026, FR]; 1,119 [2026, DE]; 695 [2026, BE]; 1,144 [2026, UK]; 627 [2026, IT]

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A trusting relationship with the vehicle service provider remains the main driver of consumer decisions

Most important reason for choosing a vehicle service provider

Reason to choose a service provider							
Trust	21%	23%	18%	21%	26%	22%	27%
Quality of work	18%	25%	17%	18%	20%	14%	20%
Warranty coverage	16%	9%	17%	14%	13%	17%	11%
Cost	14%	19%	12%	17%	14%	8%	10%
Customer experience	12%	8%	10%	10%	10%	9%	10%
Convenience (e.g., location, hours)	9%	5%	15%	9%	9%	10%	11%
Personal relationship with mechanic/technician	7%	7%	7%	7%	5%	16%	8%
Complexity of work required	2%	4%	2%	4%	2%	3%	2%

Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

Q17. What is the most important reason for your preferred choice of vehicle service provider?

Sample size: n= 640 [2026, BE]; 1,074 [2026, DE]; 1,065 [2026, UK]; 531 [2026, FR]; 718 [2026, NL]; 581 [2026, IT]; 736 [2026, ES]

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Cost/price ranks as the most important aspect of the vehicle service experience in Belgium, Germany and France, reflecting a consistent cross-border demand for value

Most important aspect of a vehicle service experience

Important aspect of vehicle service experience							
Cost/price	28%	30%	20%	29%	21%	19%	20%
Transparency of pricing and work performed	14%	21%	23%	17%	23%	26%	23%
Customer service/treatment	14%	13%	14%	9%	18%	10%	14%
Speed of service	9%	7%	8%	8%	4%	10%	7%
Explanation of service work performed	9%	8%	8%	9%	9%	8%	9%
Convenient location	7%	9%	12%	6%	6%	6%	5%
Availability of appointment	5%	3%	3%	4%	4%	7%	4%
Communication while the vehicle is being serviced	5%	4%	4%	5%	8%	4%	5%
Efficiency of check-in/check-out process	4%	1%	4%	5%	1%	4%	8%
Access to temporary/loaner vehicle	3%	2%	2%	5%	4%	3%	3%
Online booking tool	2%	1%	1%	3%	1%	3%	2%

Note: Percentages may not total 100% due to multiple responses, rounding, or excluded values.

Q21. What is the most important aspect of a vehicle service experience?

Sample size: n= 629 [2026, BE]; 1,074 [2026, DE]; 1,065 [2026, UK]; 529 [2026, FR]; 739 [2026, NL]; 583 [2026, IT]; 738 [2026, ES]

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