2023 Global Automotive Consumer Study

Key Findings: BELGIUM

January 2023

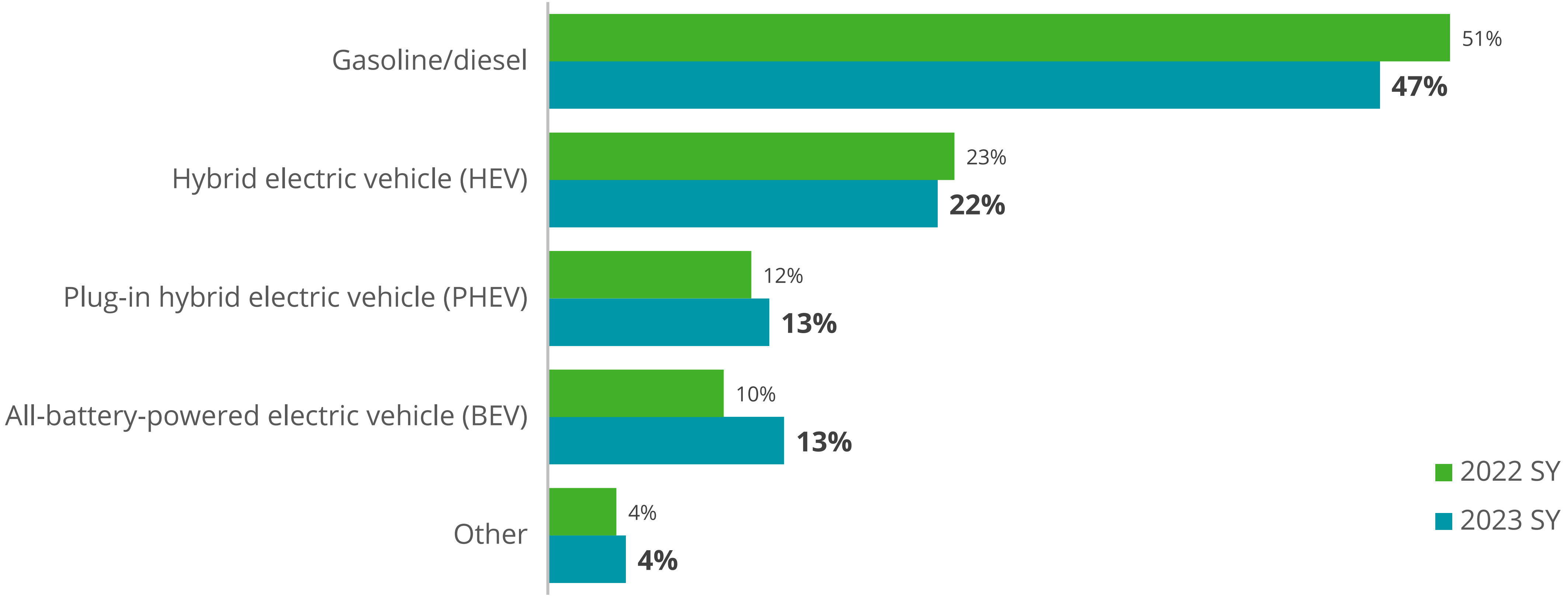
Contents

1

Vehicle electrification

The needle is moving toward an electric mobility future, but are we moving fast enough to achieve the ambitious goals that have been set for carbon emissions reduction?

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; don't know responses weren't considered.

Q40. What type of engine would you prefer in your next vehicle?

Sample size: n= 769 [2022]; 699 [2023]

The primary draw for EVs continues to centre on the consumer perception that fuel costs will be significantly lower, outweighing any concern for climate change.

Top 5 reasons for choosing an EV for next vehicle

#1
Lower fuel costs

#2
Less maintenance

#3
Extra taxes on ICE vehicles

#4
Government incentives

#5
Better driving experience

Q41. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).

Sample size: n= 337

A large majority of both ICE and EV intenders are expecting to pay less than €50K for their next vehicle, signaling a potential affordability risk given the macro inflationary environment.

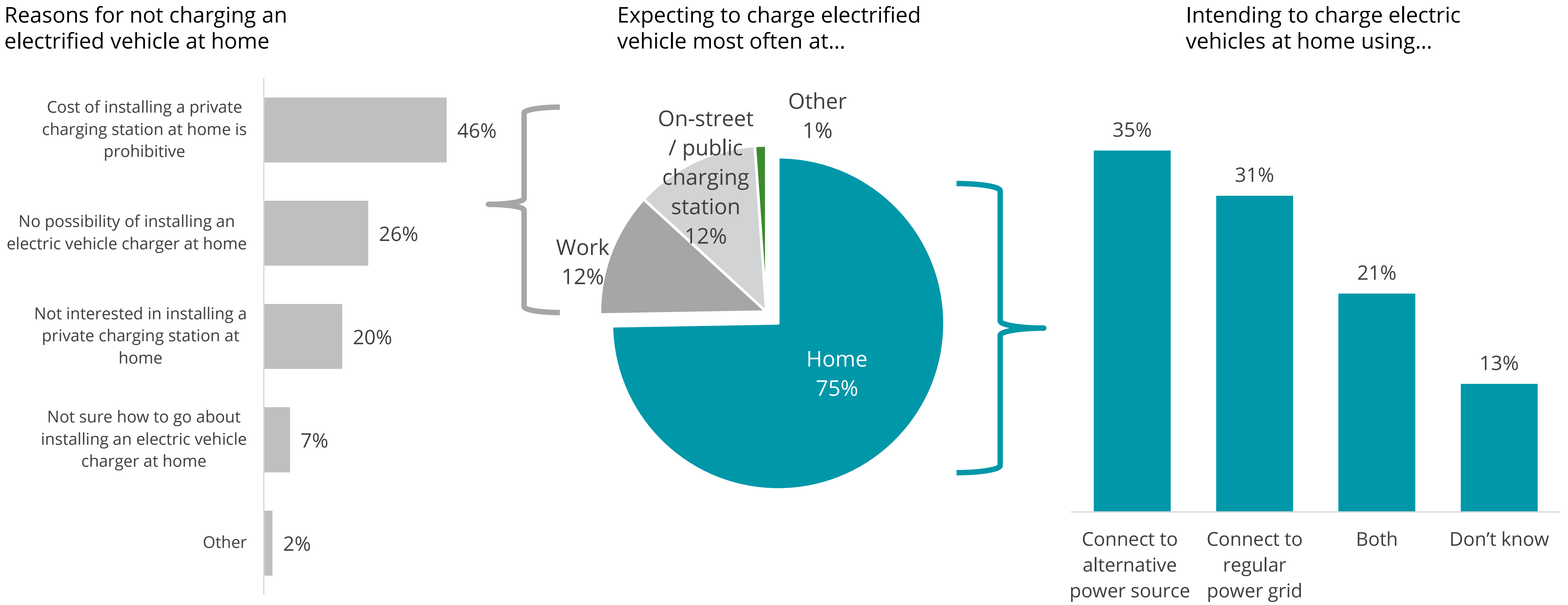
Preferred price ranges for next vehicles

	Overall	ICE Intender	EV Intender
Less than €10,000	11%	15%	6%
€10,000 to less than €15,000	17%	20%	13%
€15,000 to less than €30,000	39%	38%	42%
€30,000 to less than €50,000	18%	15%	23%
€50,000 to less than €75,000	4%	4%	6%
€75,000 or more	1%	2%	1%
Don't know/not sure	10%	6%	9%
	85%	89%	84%

Q39. 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: [Overall] n= 853; [ICE intender] n= 331, [EV intender] n=337

Most EV intender respondents plan to charge their vehicle at home by connecting to a regular power grid. Those not intending to charge at home cite high installation costs, opening the door for finance providers to offer solutions.



Q43: Where do you expect to charge your electrified vehicle most often?; Q44: How do you intend to charge your electrified vehicle at home?; Q45: What is the main reason you do not intend to charge your electrified vehicle at home?

Sample size: n= 182 [43]; 136 [44]; 46 [45]

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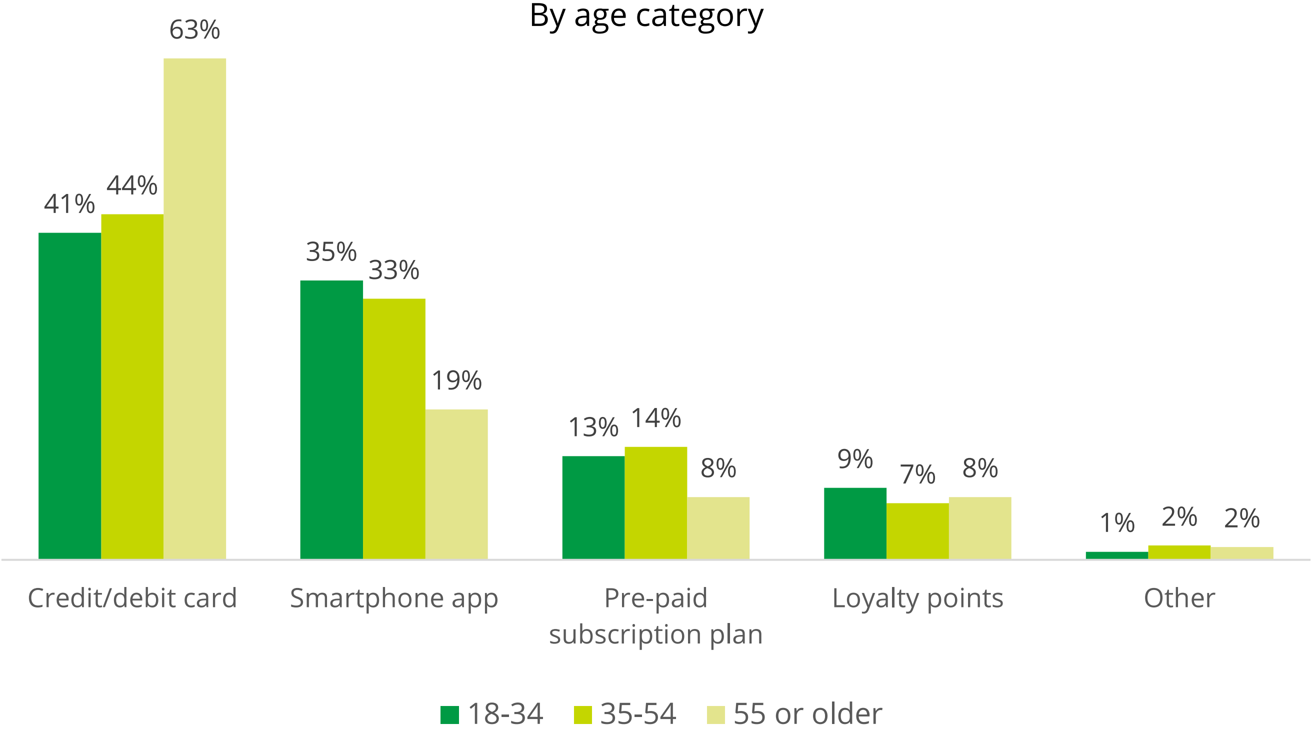
Across all age groups, surveyed consumers would prefer to pay for public EV charging via credit/debit card payments, signaling the need for standardizing the public charging experience to maximize utility and convenience.

Most preferred way to pay for public EV charging

Overall

Credit/debit card	50%
Smartphone app	28%
Pre-paid subscription plan	12%
Loyalty points	8%
Other	1%

By age category

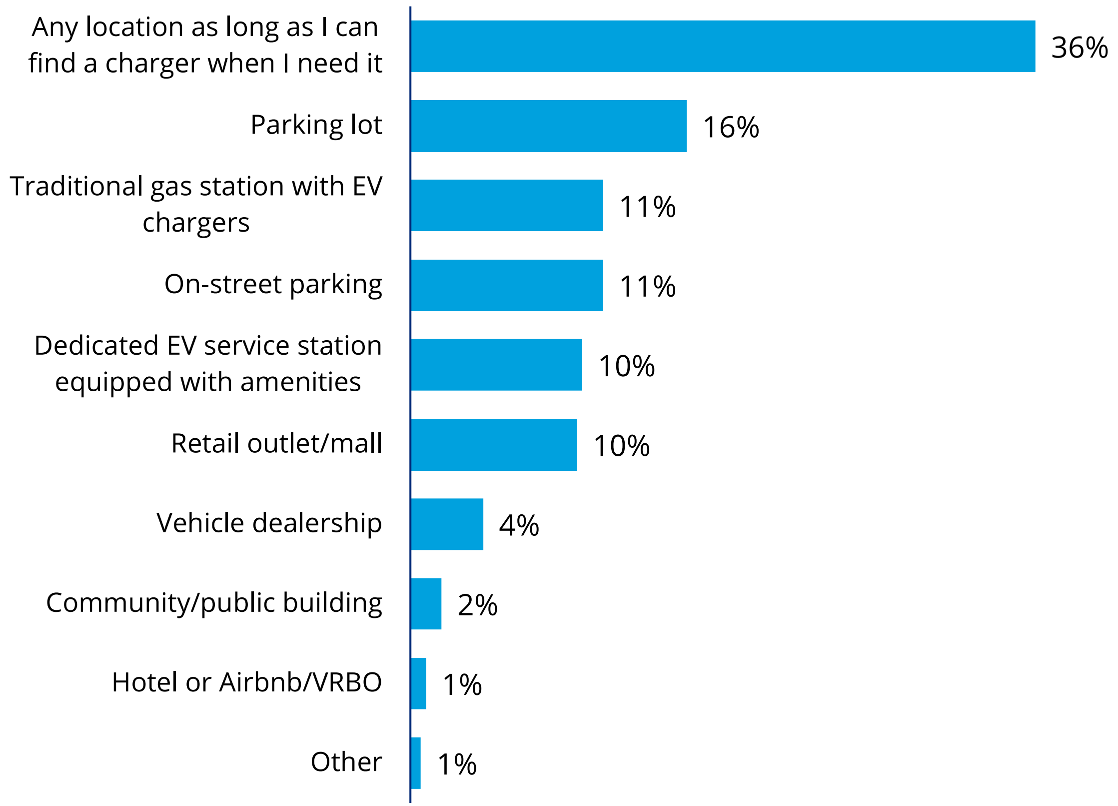


Q49: How would you most prefer to pay for public EV charging?

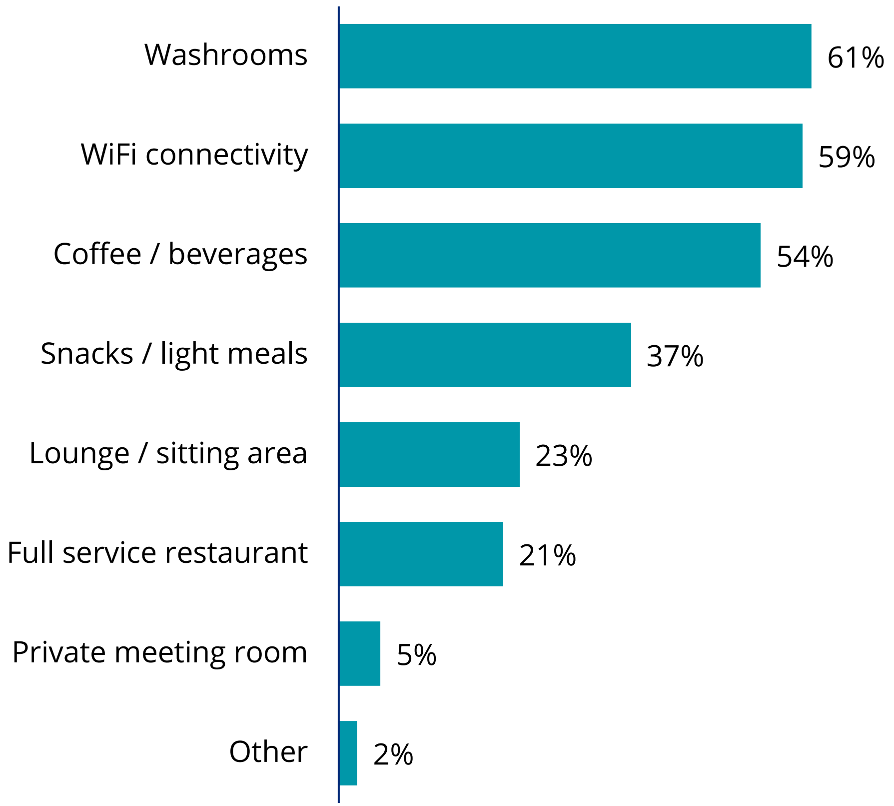
Sample size: n= 337 [Overall]; 99 [18-34], 112 [35-54], 126 [55+]

Surveyed consumers prioritize convenience when it comes to finding a charging location – preferred amenities include restrooms, Wi-Fi connectivity, and quick beverages.

Public locations that the consumers would prefer to charge their EV when they are away from their home



Type of amenities that the consumers want to have access to while their vehicle is charging at a public location



Note: Sum of the percentages in the right-side chart exceed 100% as respondents can select multiple options

Q46: Which of the following public locations makes the most sense to charge your EV when you are away from home?; Q48: What type of amenities would you want to have access to while your vehicle is charging at a public location?

Sample size: n= 337 [Q46]; 337 [Q48]

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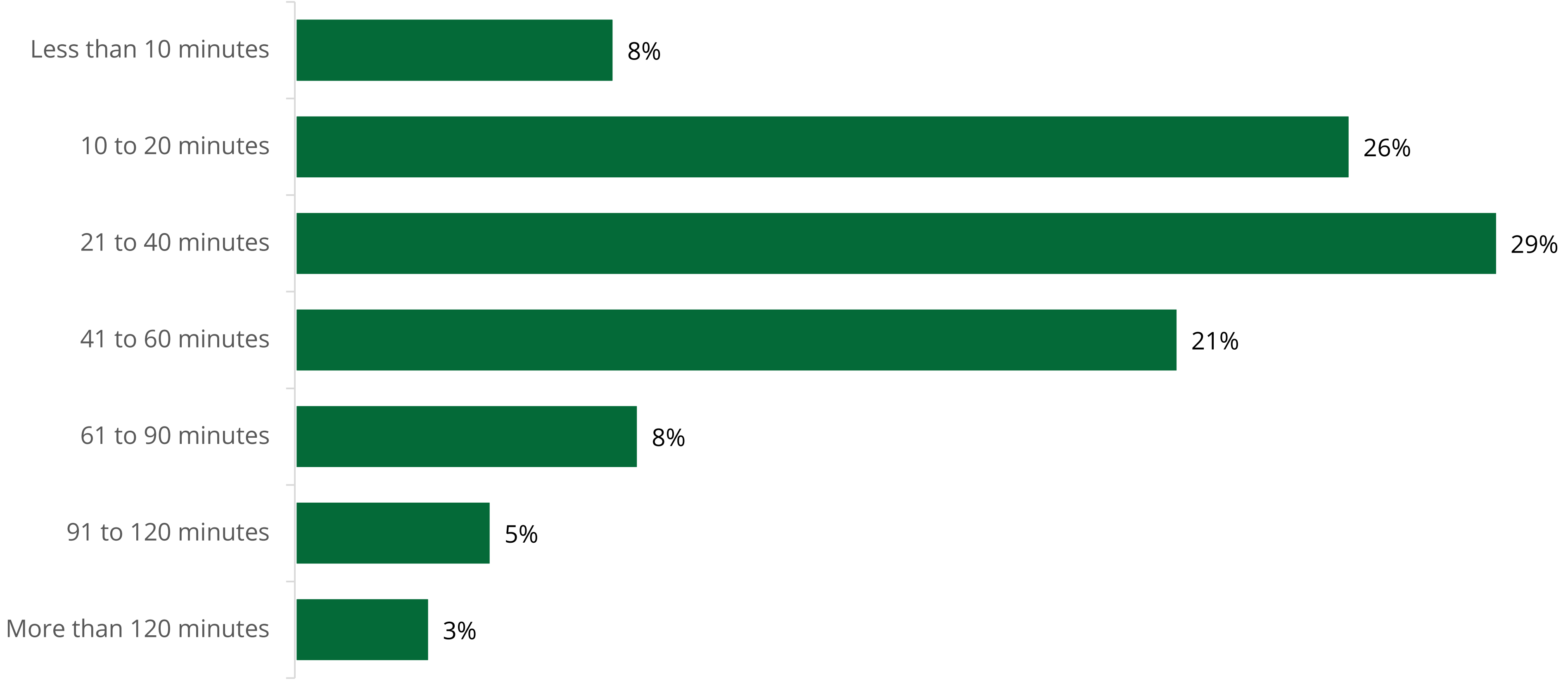
More than half of surveyed consumers (55%) would wait between 10 and 40 minutes for their vehicle to charge from empty to 80% at a public charging station, challenging conventional wisdom that matching the fossil fuel experience is “table stakes”.

Expected wait time to charge an EV at public charging stations from empty to 80%



Q47: How long would you expect it to take to charge your EV from empty to 80% at a public charging location?

Sample size: n= 337

Consumers surveyed who plan to purchase a used BEV are more concerned about the residual value of the vehicle given questions around long-term battery condition/health.

Percentage of consumers who are concerned about the resale/residual value of an all battery-powered electric vehicle (BEV)

	Overall	New vehicle intender	Used vehicle intender
Not concerned	34%	32%	35%
Neutral	39%	44%	30%
Concerned	27%	24%	35%

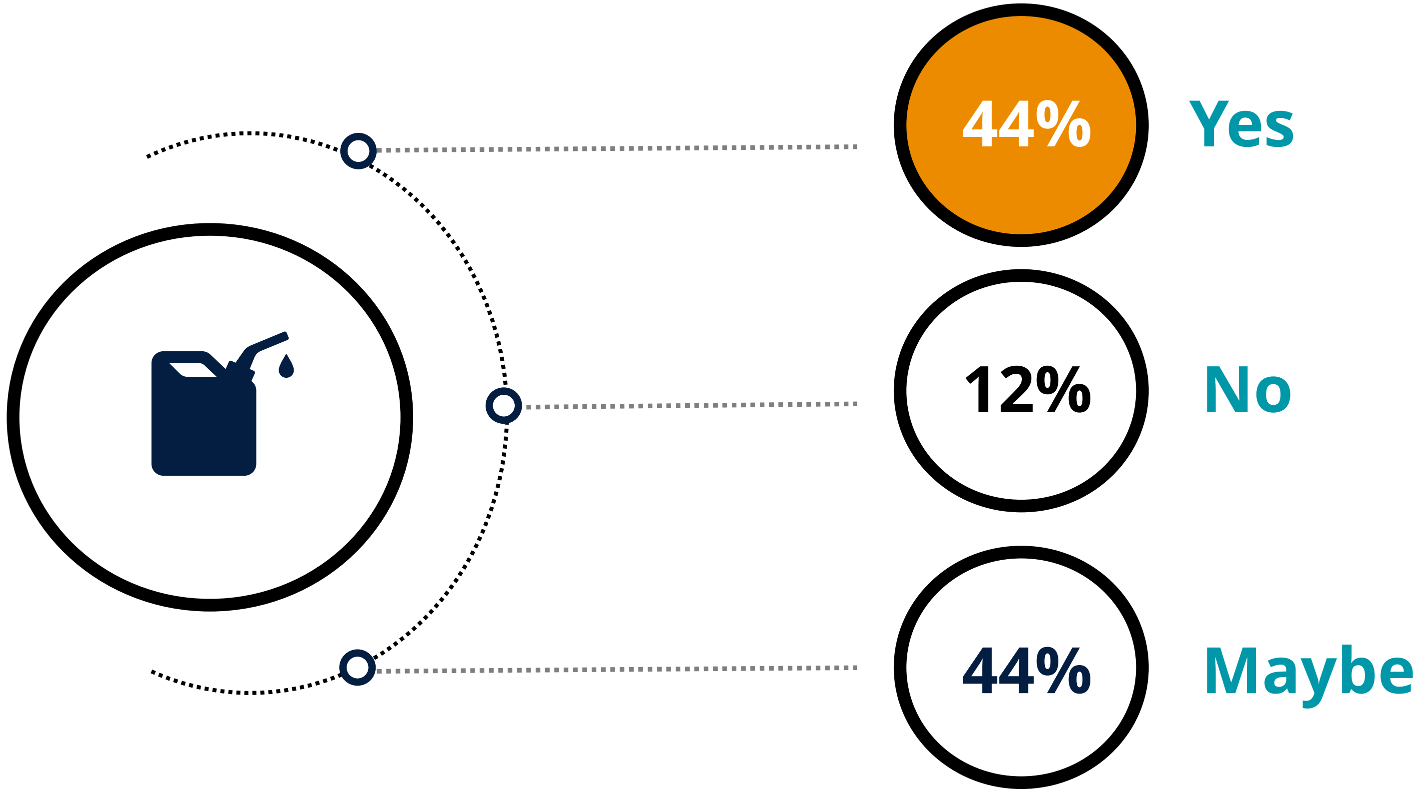
Note: Used includes nearly new/certified pre-owned and other used vehicles; Overall %s include responses of those consumers who plan to buy a new vehicle, used vehicle, and of those who are not sure whether they plan to buy a new or a used vehicle

Q50: To what extent are you concerned about the resale/residual value of an all battery-powered electric vehicle?

Sample size: n= 94 [Overall]; 62 [New]; 23 [Used]

More than 4 in 10 respondents would rethink their decision to purchase an EV if an environmentally sustainable, synthetic combustion fuel was available.

Percentage of consumers who would rethink to purchase an EV if an environmentally sustainable, synthetic fuel alternative is available for traditional (ICE) engines

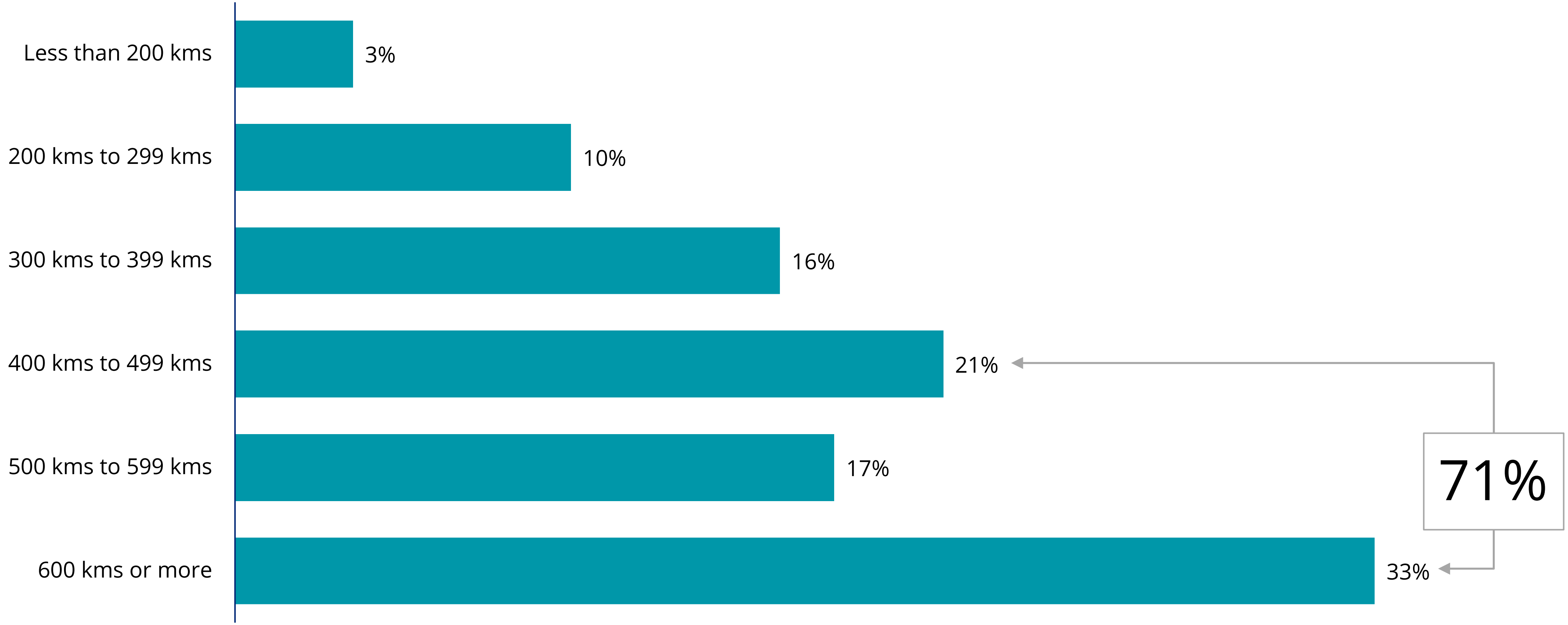


Q42: In a scenario where an environmentally sustainable, synthetic fuel alternative (i.e., carbon-neutral gas) that would work in traditional internal combustion engines was readily available, would you rethink your decision to purchase an EV?

Sample size: n= 337

7 in 10 non-BEV intenders would expect a fully charged BEV to have a driving range of at least 400 kms in order to consider one as a viable option for their next vehicle.

Consumer expectations on BEV's driving range

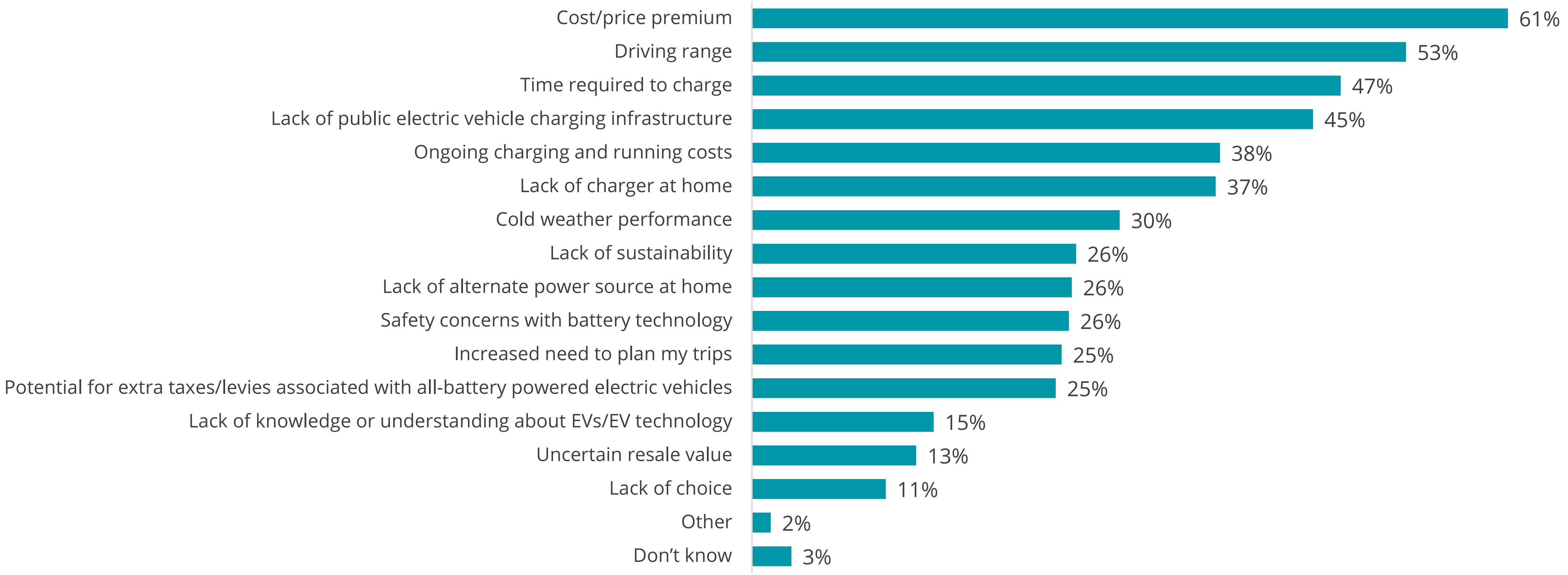


Q52: How much driving range would a fully charged all-battery electric vehicle need to have in order for you to consider acquiring one?

Sample size: n= 759

6 in 10 surveyed consumers cite cost as the biggest hurdle to BEV penetration, underlining the need to address elevated transaction prices. Also, 3 of the top 5 concerns directly related to charging - a key issue for mobility providers to solve going forward.

Greatest concern regarding all battery-powered electric vehicles



Note: Sum of the percentages exceed 100% as respondents can select multiple options

Q51: What are your biggest concerns regarding all battery-powered electric vehicles? Please select all that apply.

Sample size: n= 853

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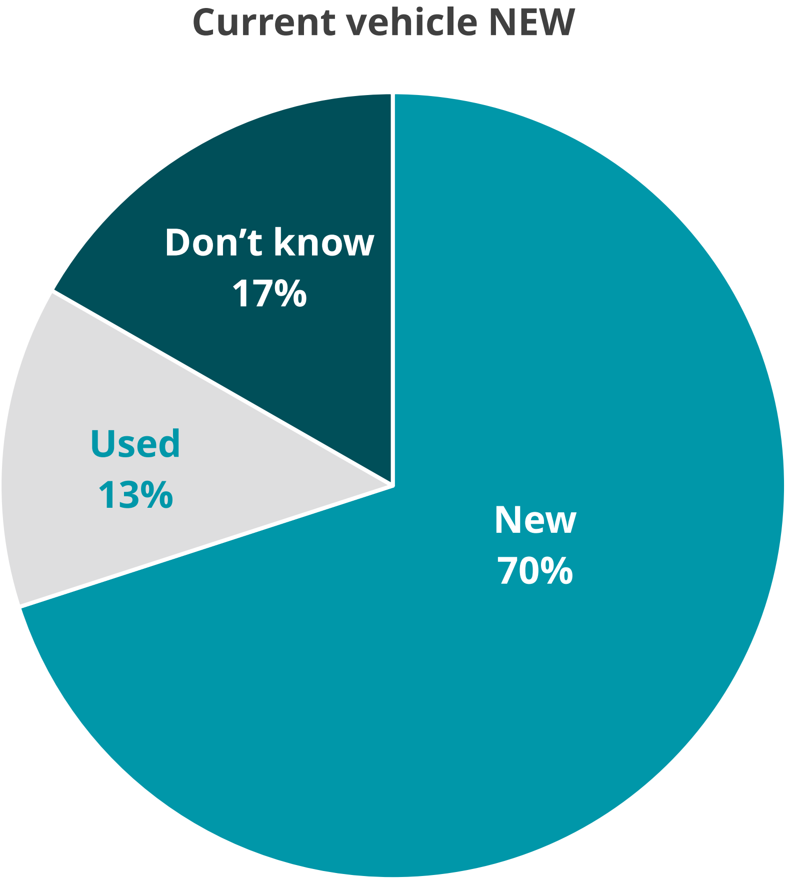
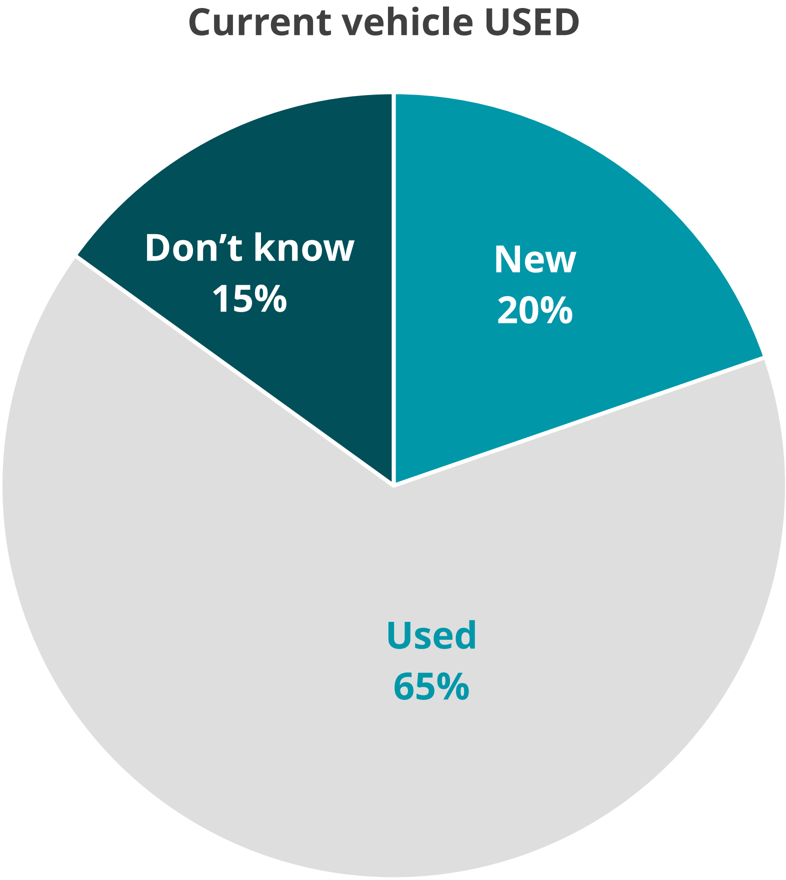
Future vehicle intentions

7 in 10 owners who acquired their current vehicle new intend to buy a new vehicle again while only 2 in 10 people who acquired their vehicle used said the same.

Next vehicle type by current vehicle type



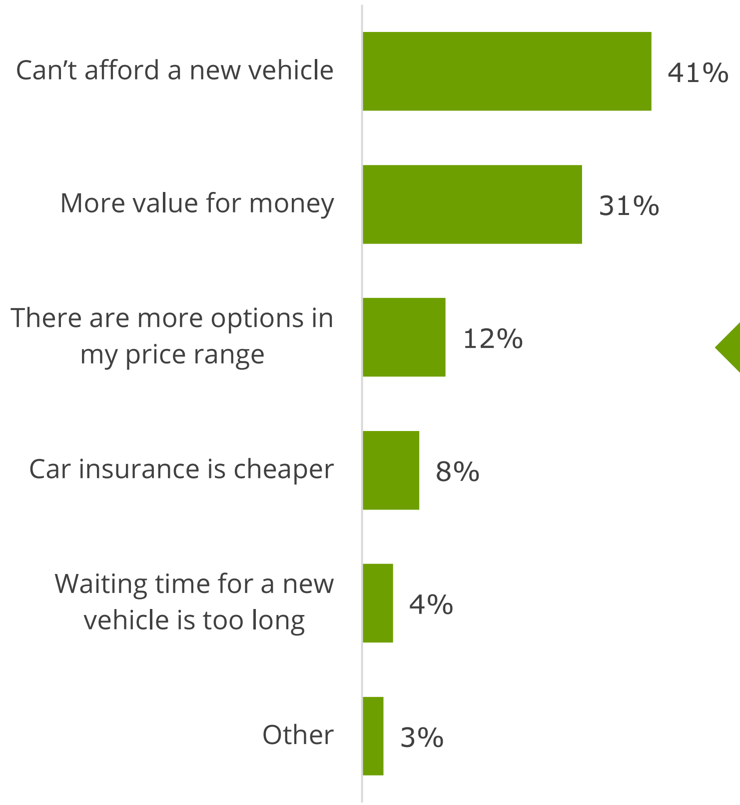


Q30. Will your next vehicle be new or used?

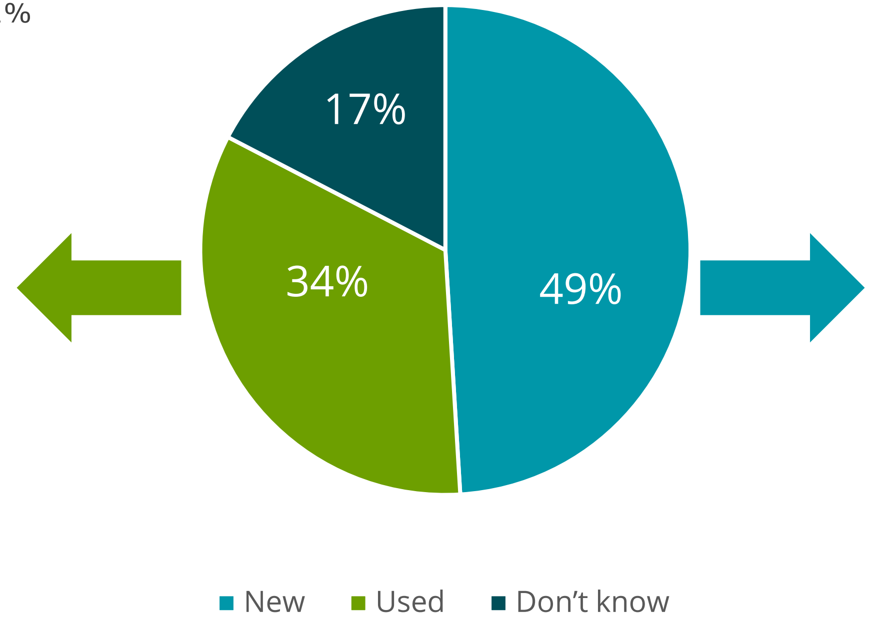
Sample size: n= 490 [New], 279 [Used]

Reliability and manufacturer warranty are the primary reasons for choosing a new vehicle. Those planning to buy used cite affordability and value for money as the main reasons.

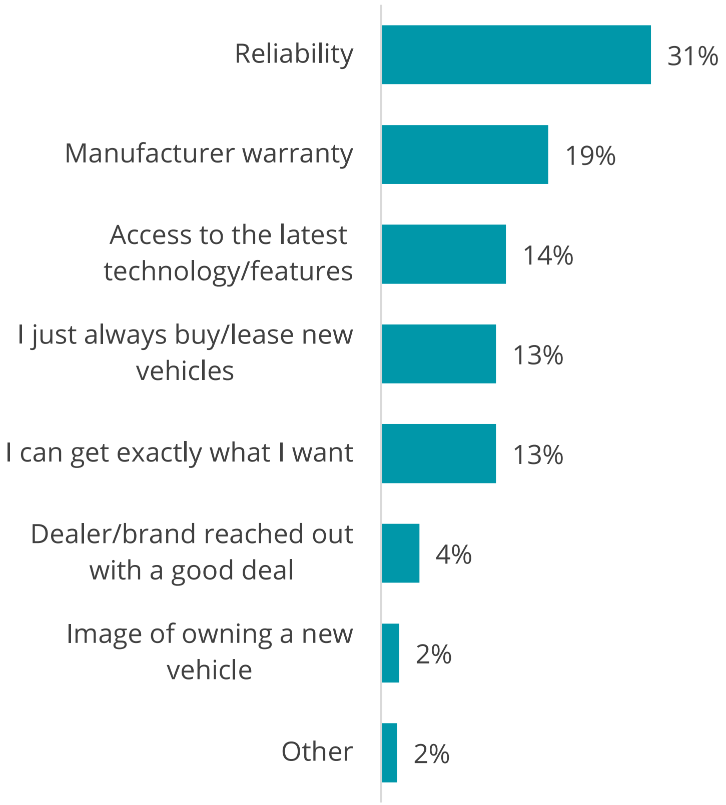
Reasons for choosing used vehicle



Kind of next vehicle



Reasons for choosing new vehicle



Note: Used includes nearly new/certified pre-owned and other used vehicles.

Q30: Will your next vehicle be new or used?; Q31/32: Considering your intent to buy a new/used vehicle, why is this preferred?

Sample size: n= 875 [30]; 429 [31]; 294 [32]

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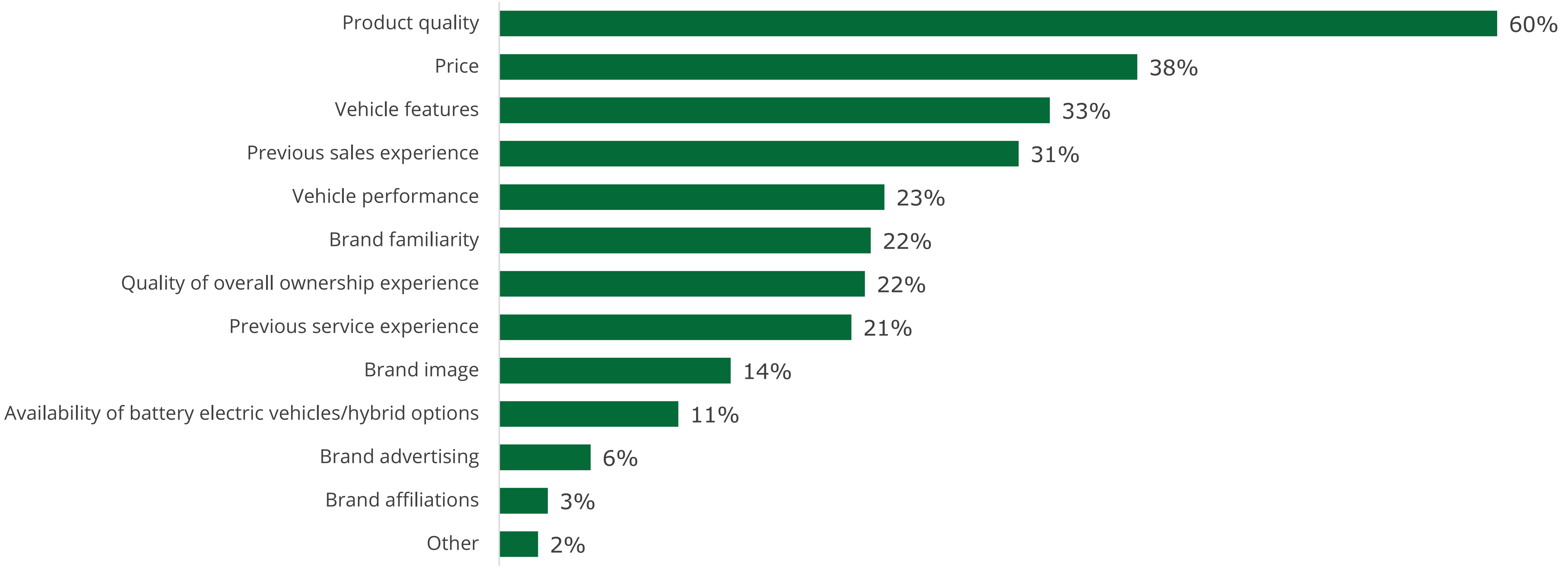
Vehicle product quality is the defining factor for consumers when choosing one brand over another. The availability of EV options rates much lower in terms of importance.

Most important factors driving the choice of brand for your next vehicle



Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q35. What are the most important factors driving the choice of brand for your next vehicle? (Please select all that apply).

Sample size: n= 853

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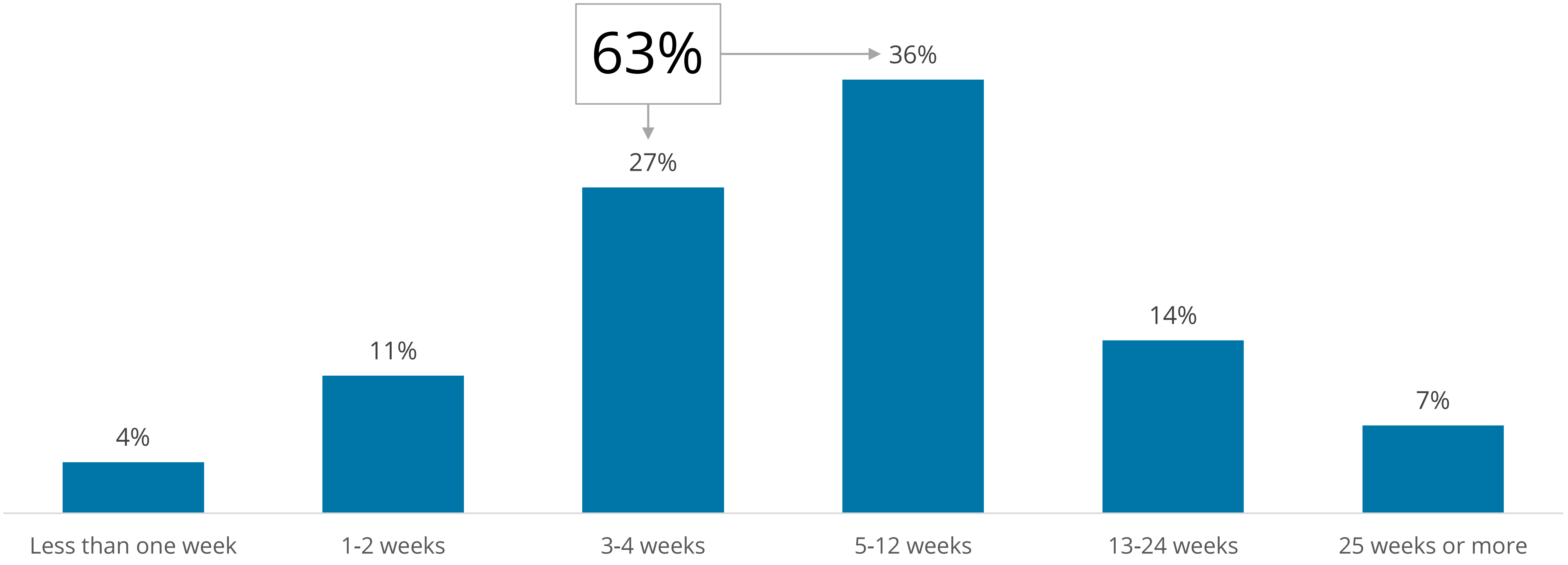
There is a significant gap between how long consumers expect to wait for delivery of their next vehicle, and the current delivery timelines.

Acceptable length of time to wait for delivery of next vehicle



Q37: In your opinion, what is an acceptable length of time to wait for delivery of your next vehicle if it meant you got exactly what you wanted (i.e., features, color, etc.)?

Sample size: n=853

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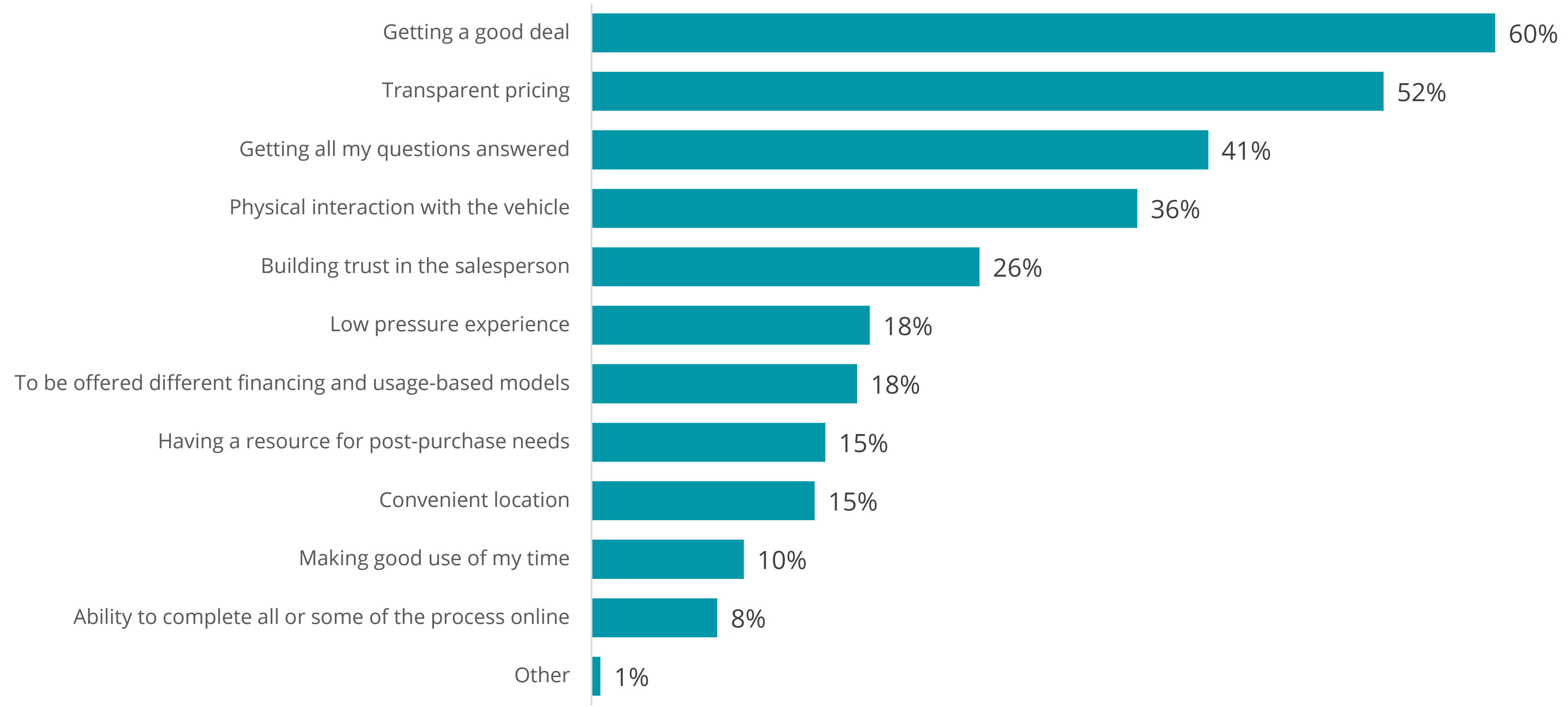
Having said that, some things never change as consumers still want a good deal with transparent pricing and getting their queries resolved before they commit to buying a vehicle.

Top three most important aspects of the purchase experience



Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q59: When looking to acquire your next vehicle, what are the top three most important aspects of the purchase experience?

Sample size: n= 853

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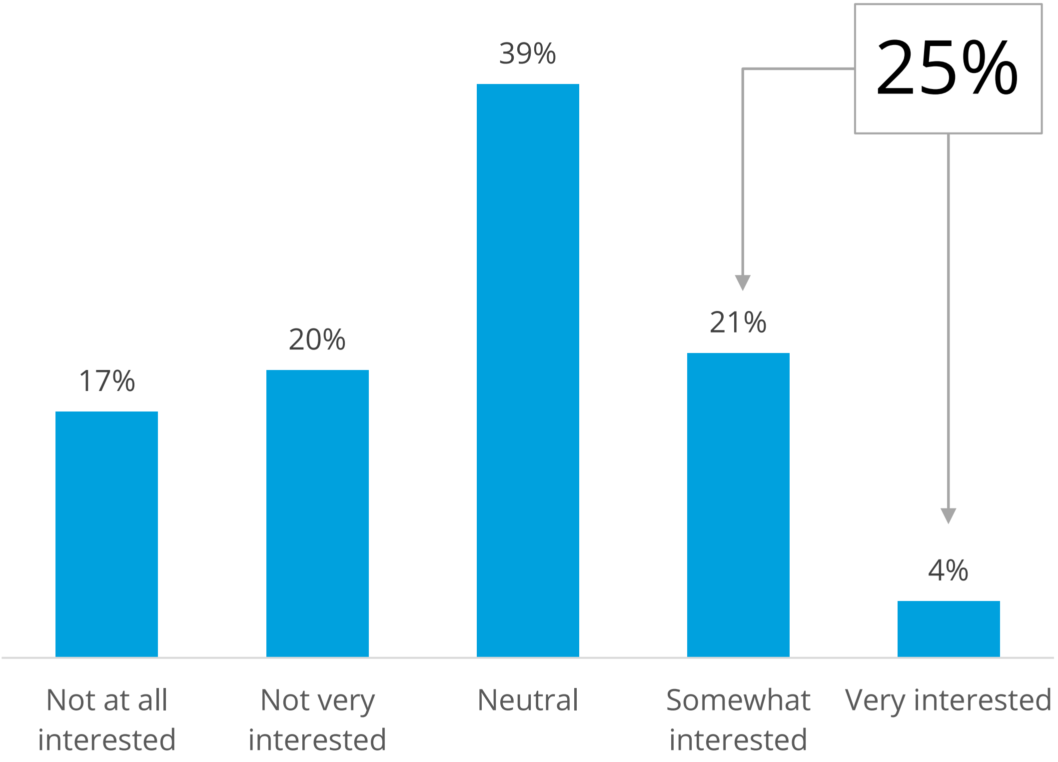
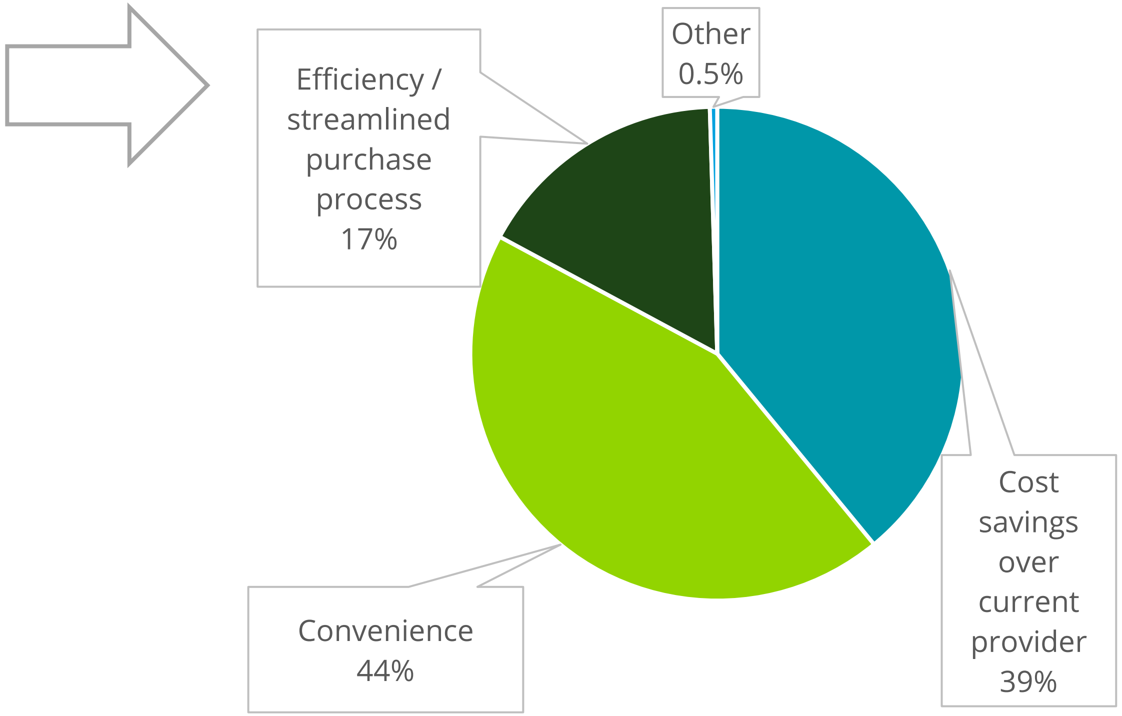
OEMs are looking at every profit pool going forward, including bringing insurance products in-house, signaling a potential disruption for the traditional value chain.

Percentage of consumers who would be purchasing insurance directly from the manufacturer



For those consumers who are interested in purchasing insurance directly from the manufacturer, primary benefits are..



Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q61: What do you expect the primary benefit of buying insurance directly from the manufacturer to be?

Sample size: n= 853 [60]; 210 [61]

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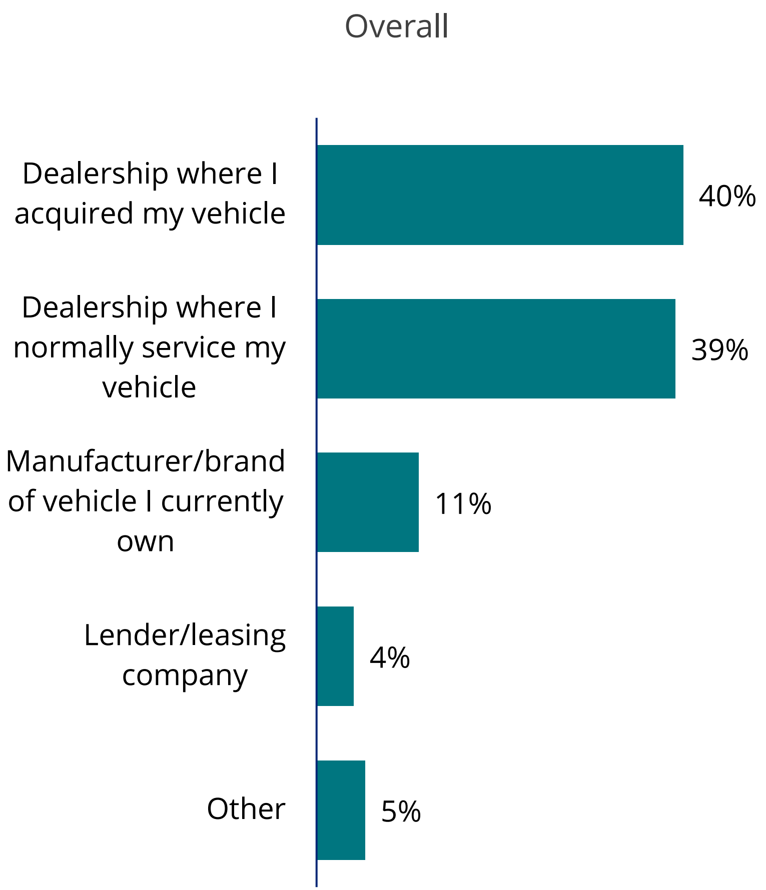
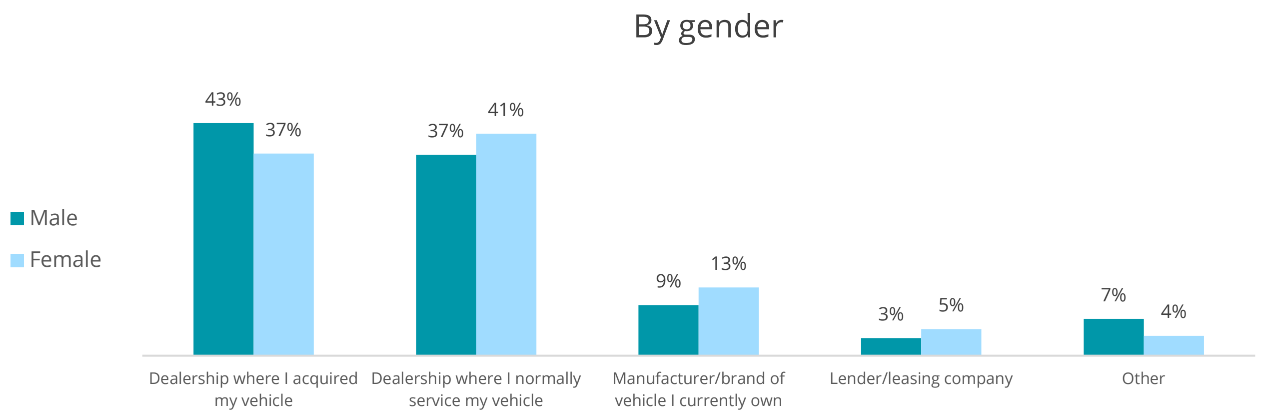
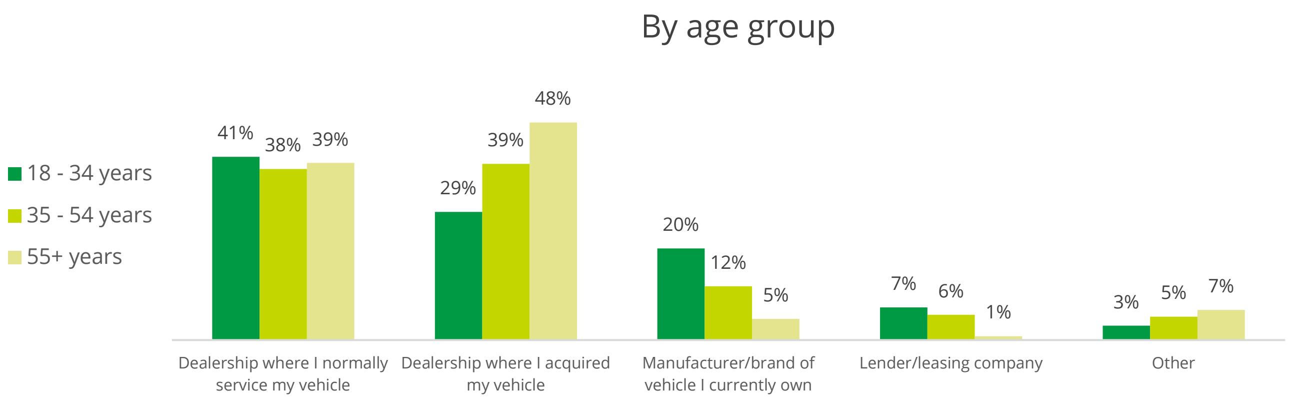
Vehicle brand and service experience

Consumers trust their purchasing/servicing dealers the most, signaling the importance this stakeholder has in building the customer relationship.

Consumers have the most trusted relationship with…





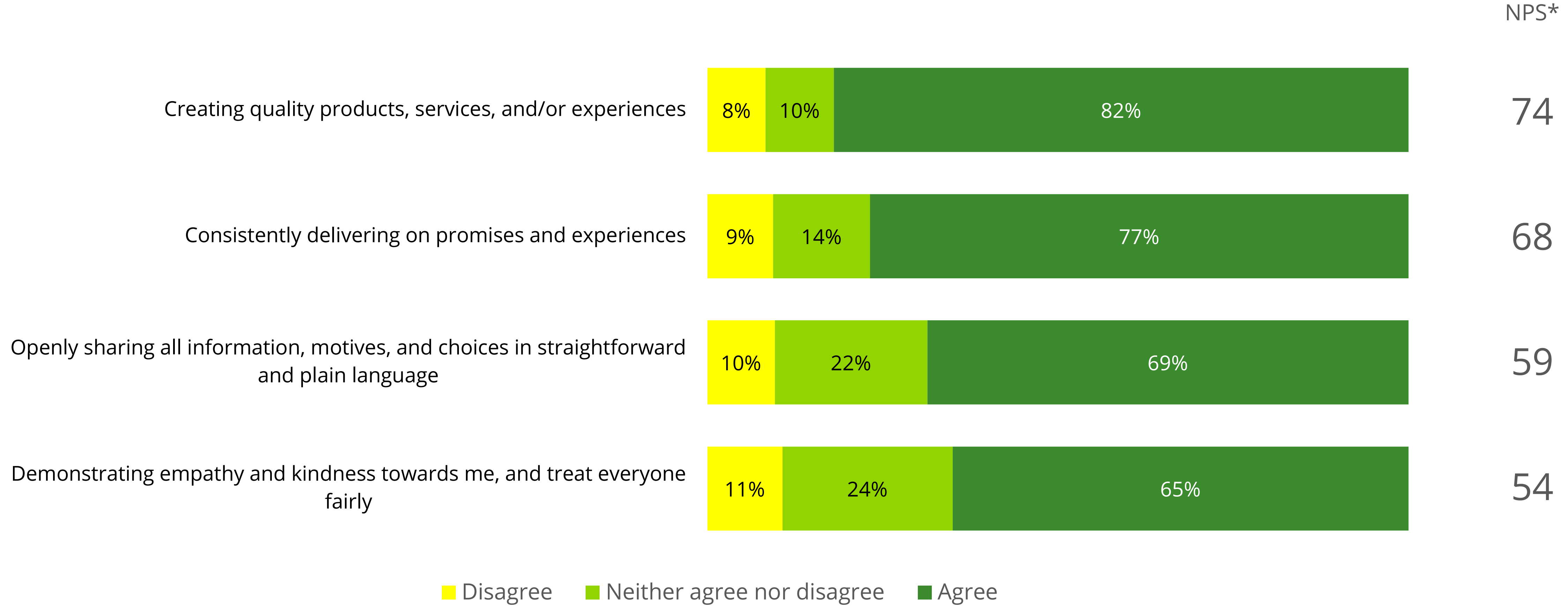


Q27: With whom do you have the most trusted relationship?

Sample size: n= 832 [Overall]; 424 [Male], 403 [Female]; 221 [18-34], 268 [35-54], 343 [55+]

While more than 8 in 10 consumers believe that the vehicle brands create quality products and services, significantly fewer people believe OEMs demonstrate empathy or fairness.

Consumer opinions on the brand of vehicle they currently own



*Net promoter score (percentage agree minus percentage disagree).

Note: Disagree includes strongly disagree, disagree, and somewhat disagree values; Agree includes strongly agree, agree, and somewhat agree values.

Q18: To what extent do you agree or disagree with the following statements relative to the brand of vehicle you currently own?

Sample size: n= 832

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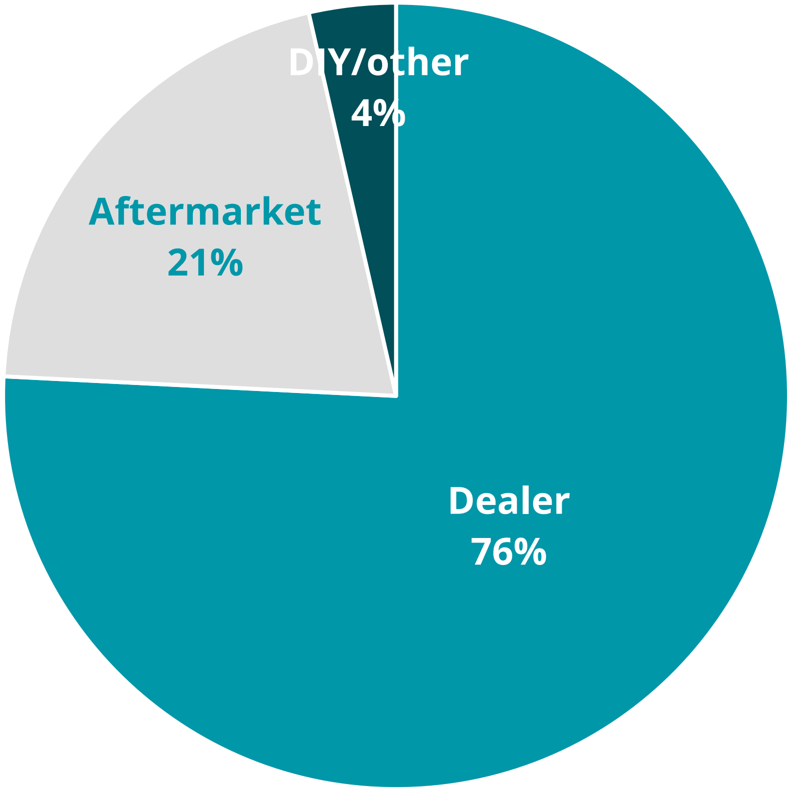
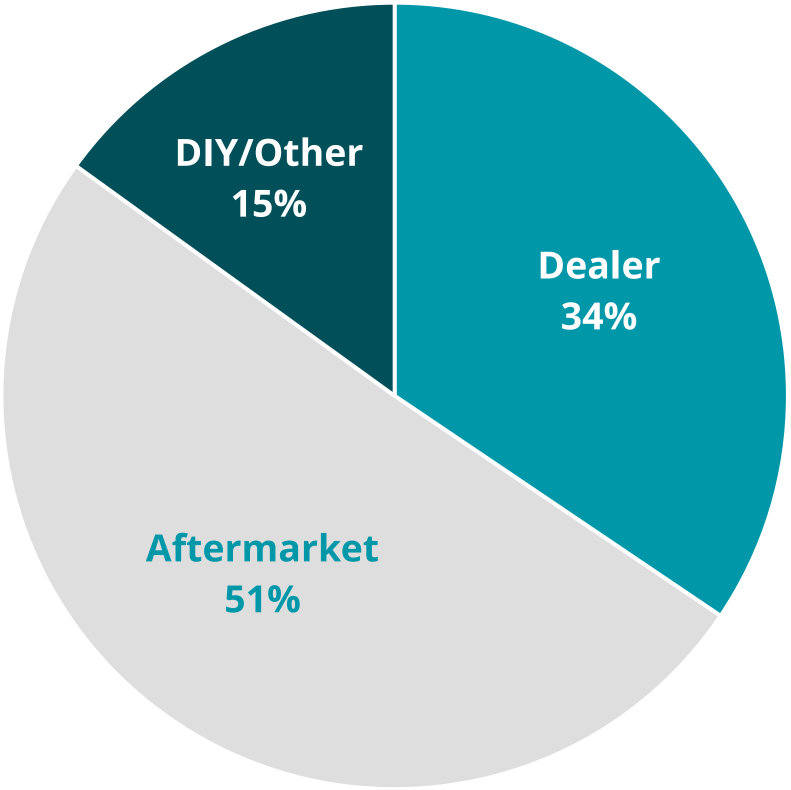
More than 7 in 10 consumers who originally acquired their new vehicle routinely take it back to the dealer for service, whereas only 34% of used vehicle owners do the same.

Preferred vehicle service provider by how current vehicle was acquired

Vehicle acquired NEW



Vehicle acquired USED

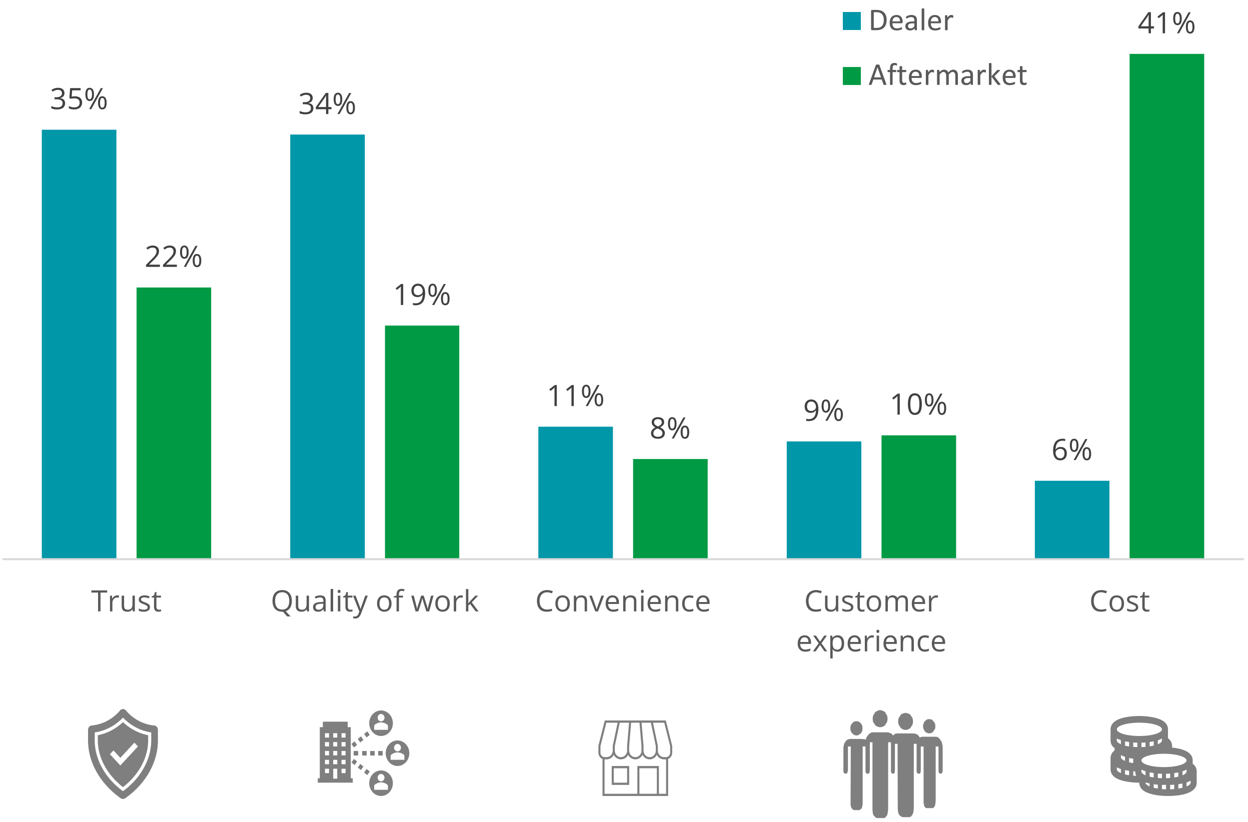


Q24: Where do you normally service your vehicle?

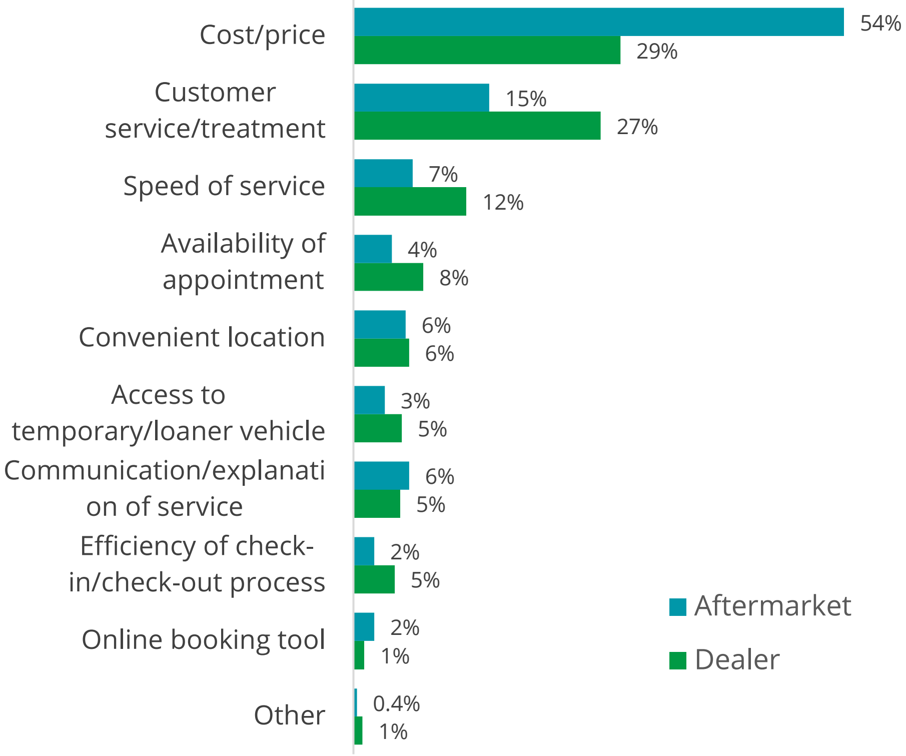
Sample size: n= 533 [New], 299 [Used]

Though consumers look at trust and quality of work in choosing a vehicle service provider, cost is the reason to choose an aftermarket facility. Cost and customer service top the experience.

Reasons for choosing vehicle service provider (by preferred provider)



Most important aspect of the vehicle service experience (by preferred provider)



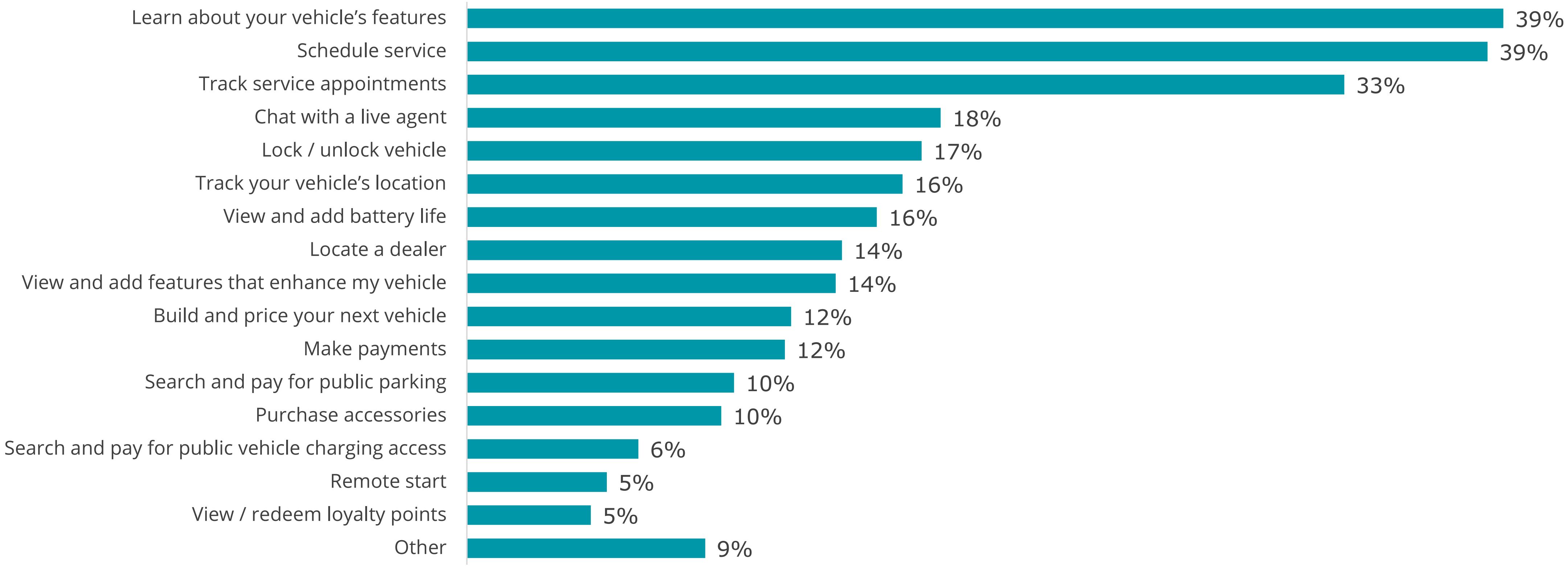
Note: "Other" reasons not shown for choosing a vehicle service provider

Q25: What is the most important reason for your preferred choice of vehicle service provider?; Q26: What is the most important aspect of a vehicle service experience?

Sample size: n= Dealer [507], Aftermarket [261] for Q25 and Q26

Consumers most prefer to access applications that help them learn about their vehicle's features and help in scheduling/tracking service appointments.

Important features of a vehicle brand app



Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q28: What are the most important features of a vehicle brand app? Please select all that apply.

Sample size: n= 832

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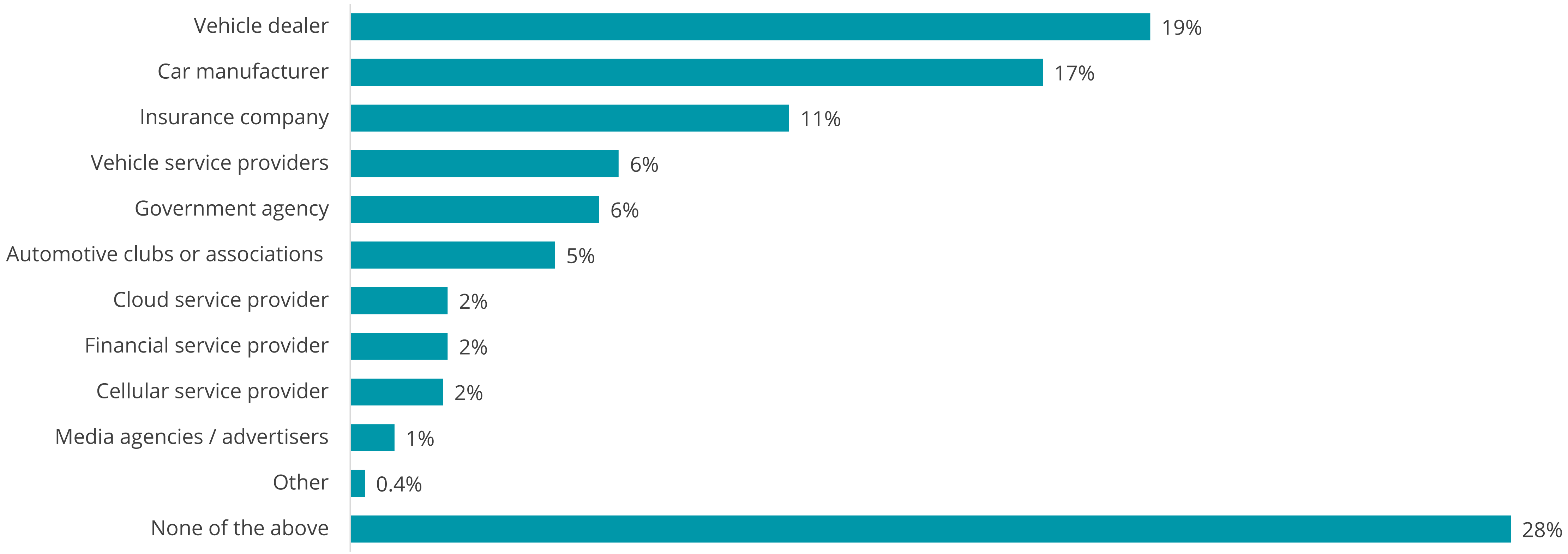
4

Connectivity

On one hand, consumers trust dealers and OEMs the most to manage the data generated by the vehicle. On the other hand, 28 percent of consumers don't trust anyone.

Consumer opinions on whom they trust the most to manage data generated/collected by their vehicle



Q57: In a scenario where you owned a connected vehicle, which of the following entities would you most trust to have access to the data your vehicle generates?

Sample size: n= 853

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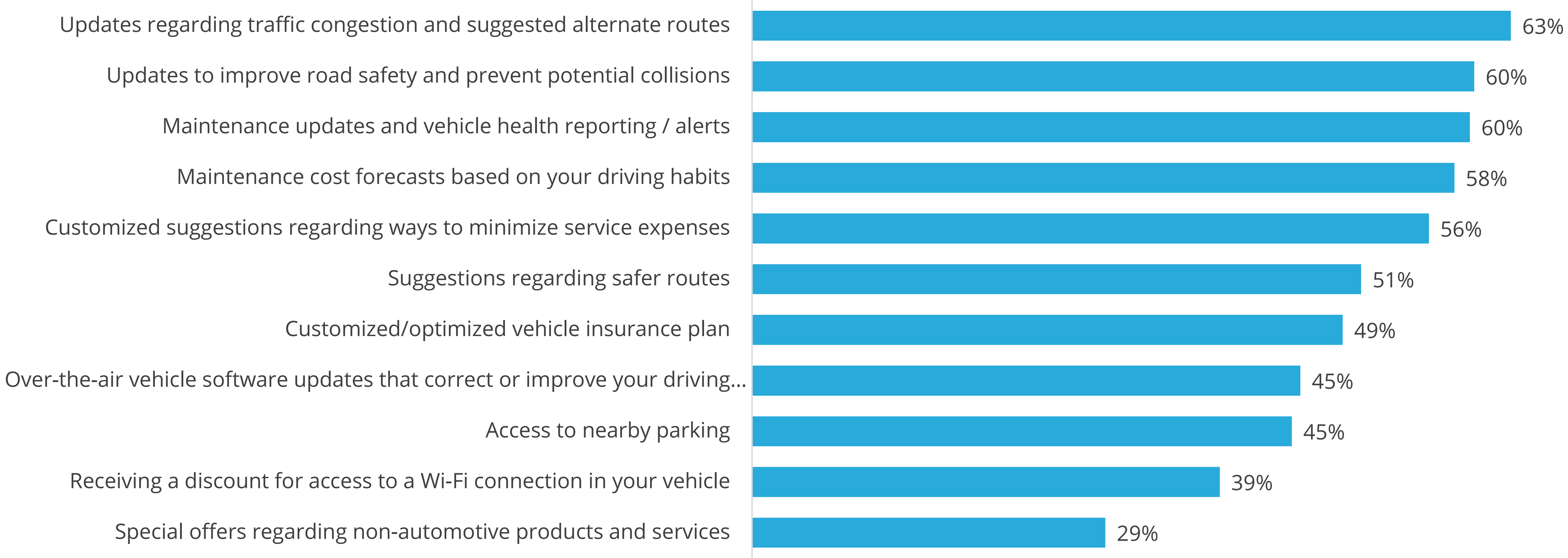
But, consumers are ready to share PII* if it helps them get traffic/road safety updates, maintenance costs/updates, and ways to lower service expenses.

Consumer opinions on benefits of connected vehicles



*personally identifiable information.

Q55: How interested are you in the following benefits of a connected vehicle if it meant sharing your own personally identifying data and/or vehicle/operational data with the manufacturer or a third party?

Sample size: n= 853

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At the same time, 4 out 10 consumers are concerned if data related to the vehicle's location, connected services, and biometric data is shared.

Percentage of consumers concerned in sharing the data with vehicle manufacturer, dealer, insurance company and/or other third parties

Q56: 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: n= 853

More than half of surveyed consumers are ready to make payments for connectivity technologies on a per use basis while a third prefer to pay upfront.

Consumers preferred ways to pay for additional connectivity technologies

57%	Charged on a per use basis
35%	Up front as part of the vehicle purchase price
8%	As part of a monthly service to which I subscribe

Vehicle buyers prefer to pay for added tech features as per usage

Q58: How would you prefer to pay for additional connectivity technologies in your vehicle?

Sample size: n= 853

5

About the study

About the study: Belgium

Global Context

Deloitte’s Automotive Consumer Study has been running for more than a decade. The 2023 edition surveyed more than 26,000 consumers across 24 countries

Survey timing

October 03 to October 11, 2022

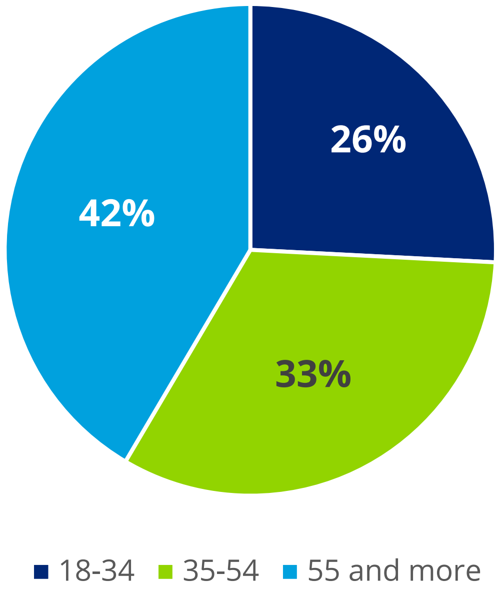
Sample

The survey polled a sample of 1,019 consumers in Belgium. The survey has a margin of error for the entire sample of +/-3.1%

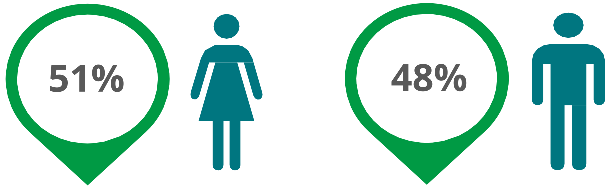
Methodology

The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire (translated into local languages) via email.

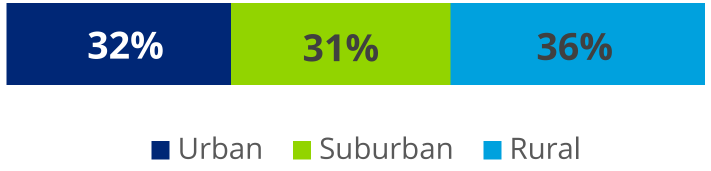
Age group



Gender



Location



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