Deloitte.

2025 Global Automotive Consumer Study

Key Findings: Belgian Focus

February 2025

Private consumers - Key findings

1 **All-battery electric vehicle (BEV) adoption remains low as interest in ICE increases**

The adoption of BEVs is primarily hindered by cost, as the high upfront price remains the main barrier, despite the appeal of lower fuel cost. Consumers are also anxious about range and charging time, although most do not drive long distance and are willing to wait to charge. Finally, home charging remain the favorite option, but certain demographics with no private driveway/garage require a reliable, safe and preferably fast public charging infrastructure.

2 **Intended vehicle acquisition is still delayed**

The private car market still needs time to recover as most of respondents plan to delay their next purchase by 1 to 5 years. Price and product quality remain the two key factors while brand loyalty is perceived as less important. Finally, Belgians continue to favor cash and loans as their preferred methods of financing.

3 **Consumers want to connect their smartphone with their car**

While car manufacturers are attempting to introduce their own connected service ecosystems, half of the surveyed consumers still believe their next vehicle should be able to connect with their smartphone. However, consumers are willing to pay for extra connected services related to safety features. There is also a growing recognition of the value that AI can bring to vehicle system, even though data management and privacy remains sensitive issues.

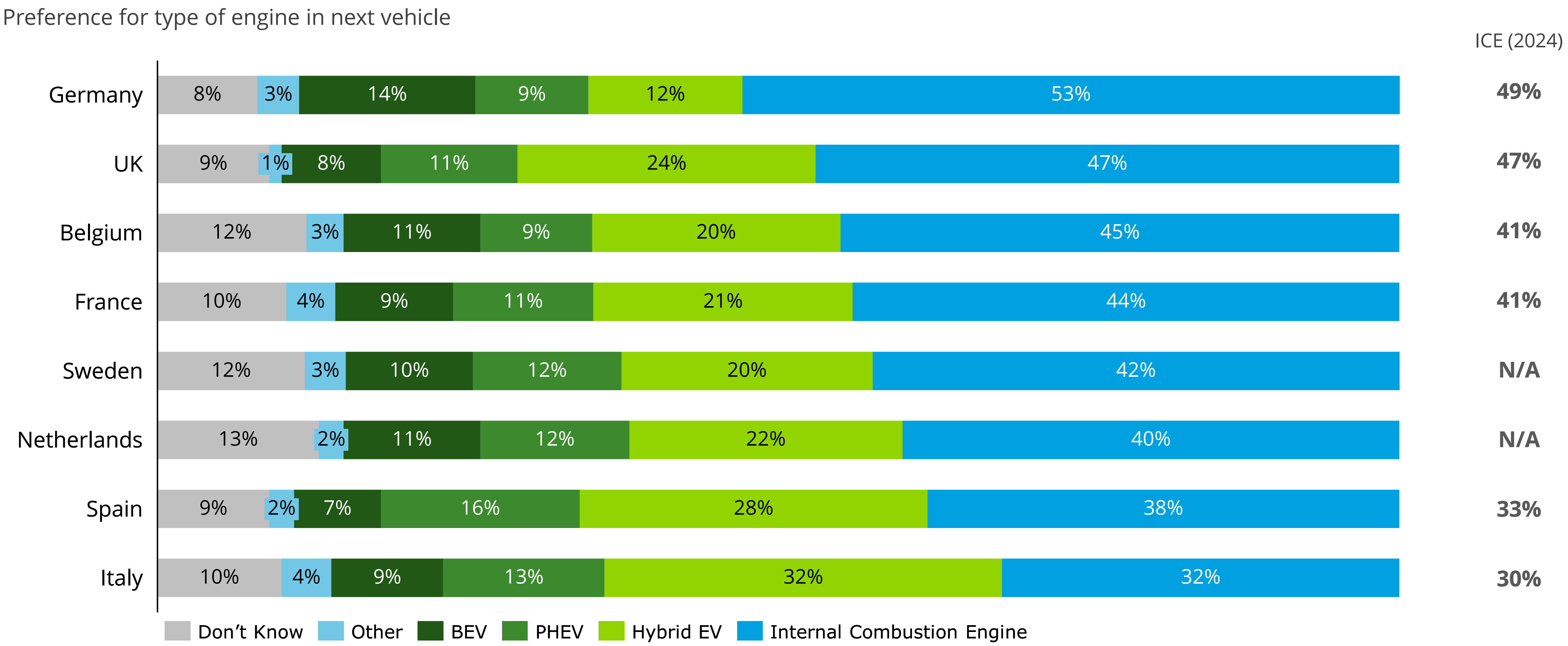
4 **Private car ownership remains central with other mobility solutions coming on top**

However, younger consumers and urban dwellers tend to favor more flexibility over ownership. Increasing the cost of private car usage combined with optimized Mobility-as-a-Service (MaaS) solutions could drive a behavior shift toward a bigger adoption of mobility alternatives for Belgians but still on top of the car.

Contents

1 Vehicle electrification

The Belgian private consumer still prefers to buy petrol/diesel next



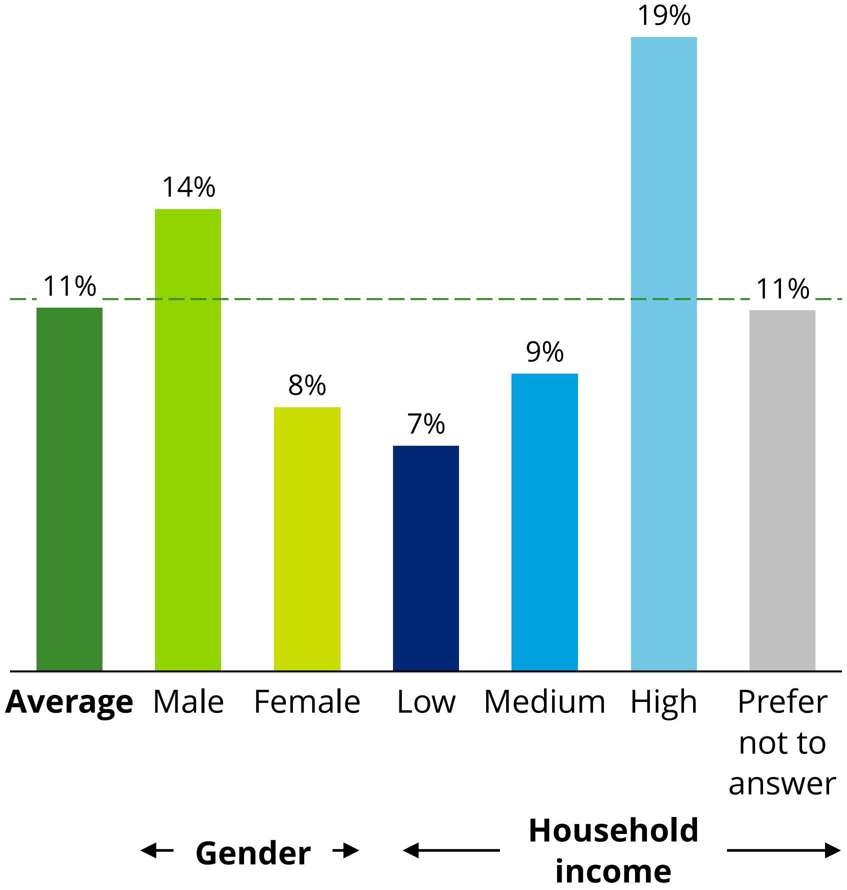
Note: Other includes vehicles with engine types such as compressed natural gas, ethanol, and hydrogen fuel cells;

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

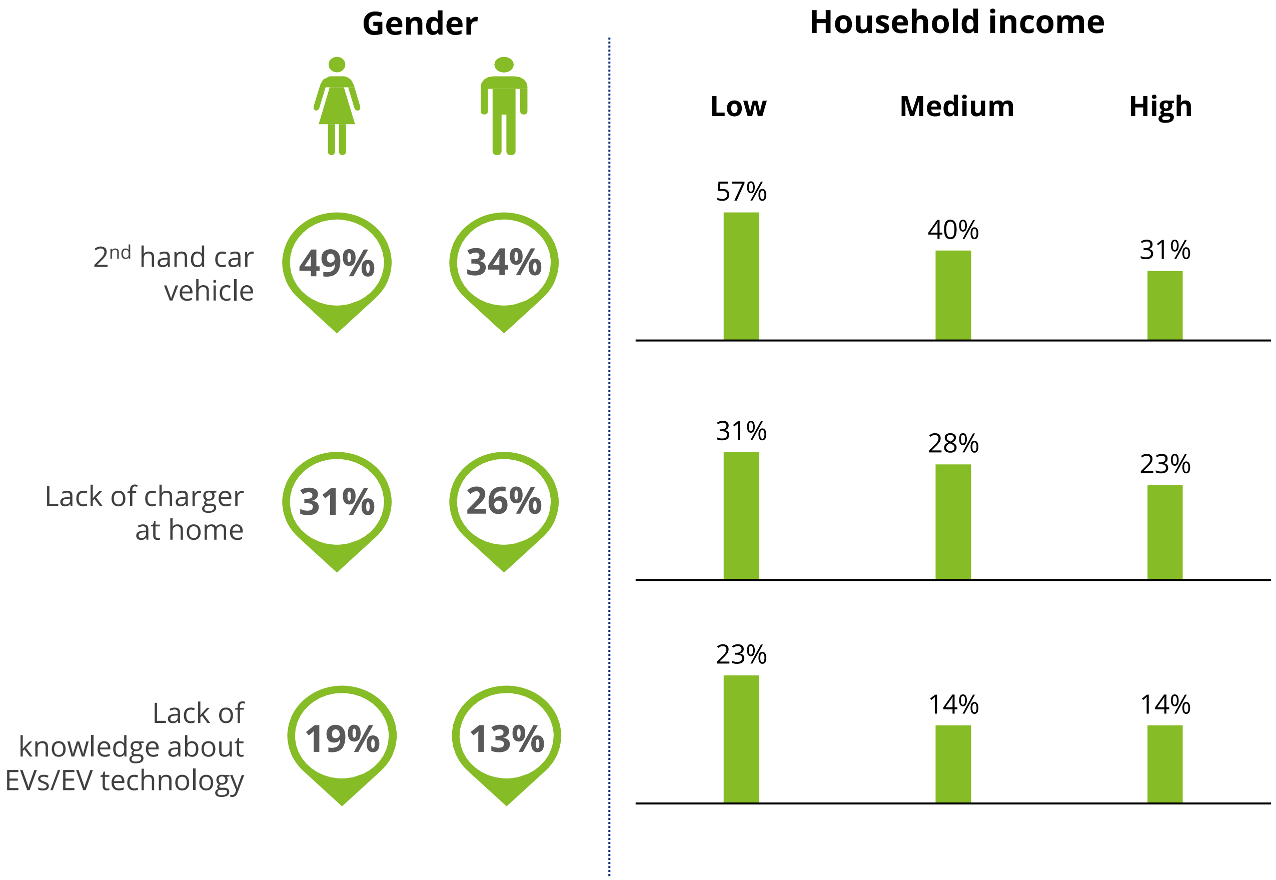
Sample size: n= 885 [2024]; 925 [2025]

Women and low-income households favor BEVs less, likely due to their preference for second-hand cars in an undeveloped electric market, limited home charging, and lack of EV knowledge

Preference for all battery-powered electric in next vehicle by gender and household income



Significant differences in vehicle type & concerns regarding all battery-powered electric by gender and household income



Q41. What type of engine would you prefer in your next vehicle? Q8. When you acquired your current vehicle, was it… ? Q52. What are your biggest concerns regarding all battery-powered EVs? (Please select all that apply.)
Sample size: n= 925 [Q41]; n= 760 [Q8]; n= 925 [Q52]

Consumers are drawn to EVs for lower fuel costs, while environmental concerns fade, and recent LEZ and fiscal incentive changes may hinder EV adoption by fostering consumer indecision

Reasons for choosing an EV for next vehicle

Country insight – Lower fuel cost is the top reason to adopt EVs, except in Germany, where environmental concern rank first, and in the UK, where it ranks second but scores higher than the other countries. Finally, French and German consumers are more likely to adopt EVs due to government incentives.

#1

50% ↑ *1%*
Lower fuel cost

Key Insight – The next generation *is the only group putting* ***concern for the environment as important as lower fuel cost***

Environment & Health

37% ↓ *7%*
Concern for the environment

19% ↑ *2%*
Concern about personal health

Vehicle characteristics

28% ↑ *3%*
Driving experience

28% =
Less maintenance

Regulations

28% ↓ *2%*
Potential for extra taxes/levies applied to internal combustion vehicles

21% ↓ *5%*
Potential ban on sale of new internal combustion vehicles

18% ↓ *6%*
Government incentives/subsidies/ stimulus programs

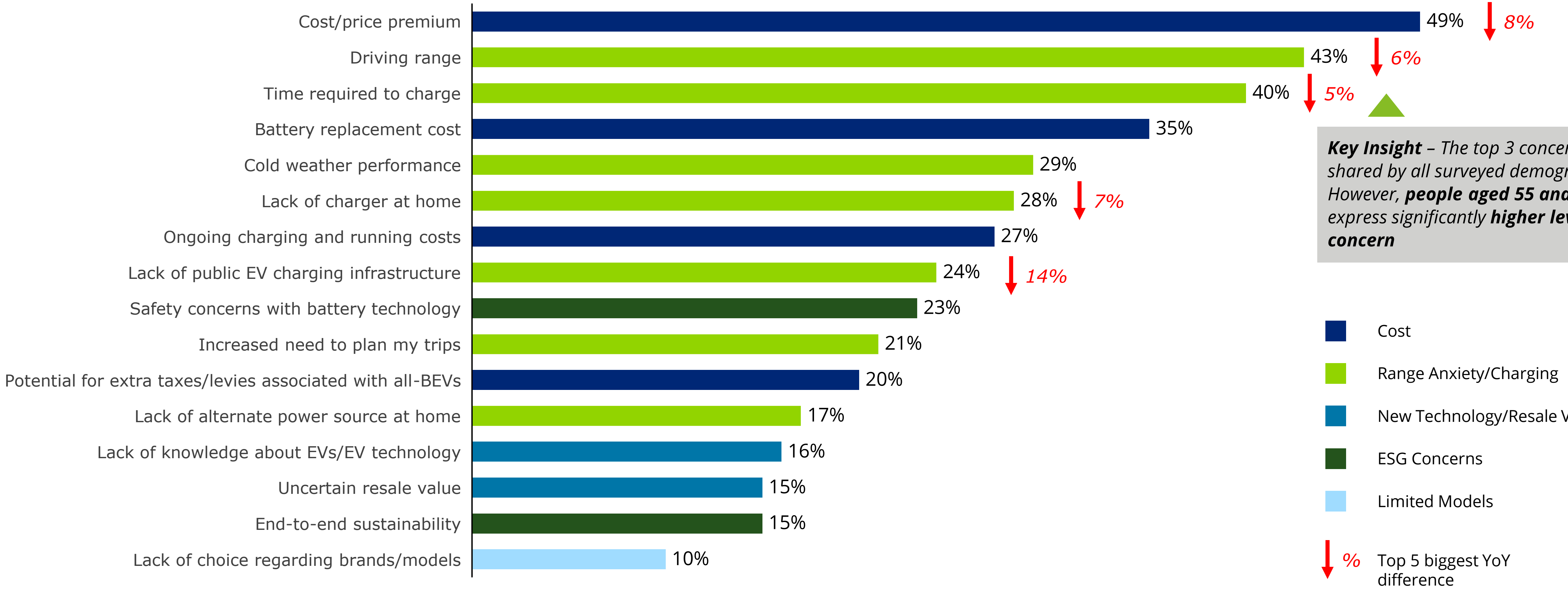
↓ *%* YoY difference

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

Sample size: n= 370 [2025]

The high up-front purchase price of BEVs remains the biggest barrier for private individuals in Belgium

Greatest concern regarding all battery-powered electric vehicles



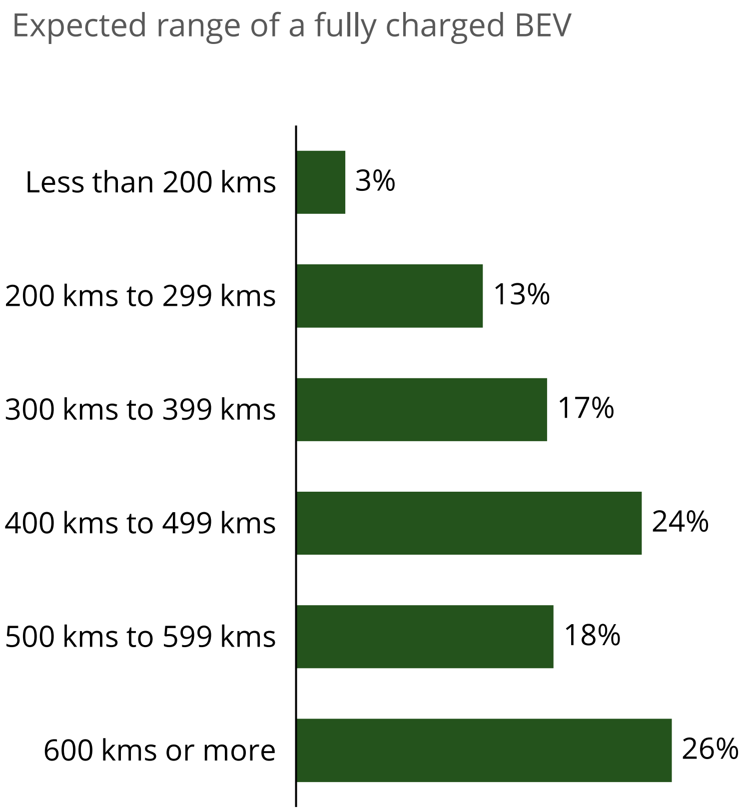
Key Insight *– The top 3 concerns are shared by all surveyed demographics. However,* ***people aged 55 and older*** *express significantly* ***higher levels of concern***

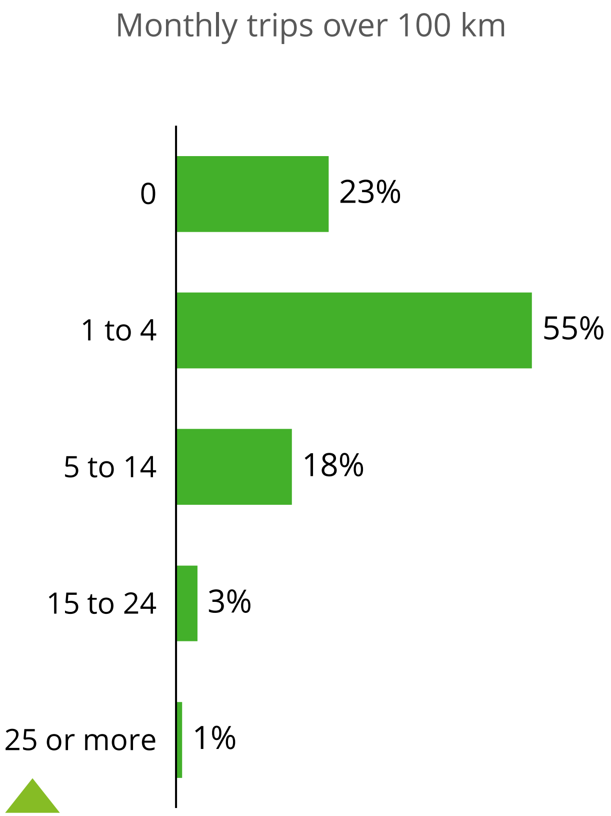
Note: Sum of the percentages exceed 100% as respondents can select multiple options; other values not shown

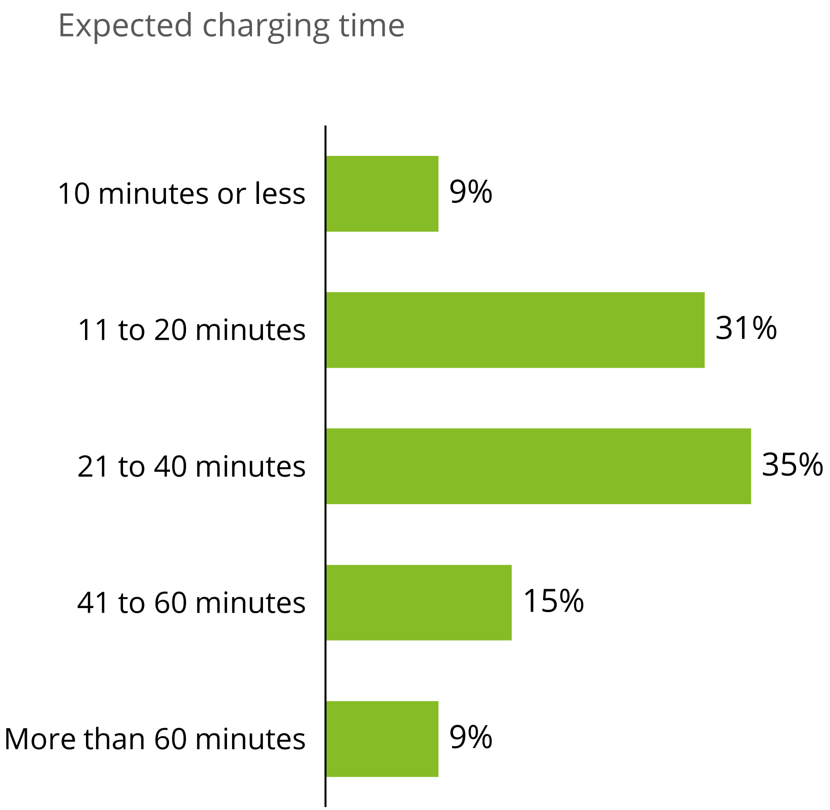
Q52: What are your biggest concerns regarding all battery-powered electric vehicles? Please select all that apply.

Sample size: n= 925

While driving range and time to charge ranks second and third, most people do not drive long distances often and are willing to wait up to 40 minutes to charge







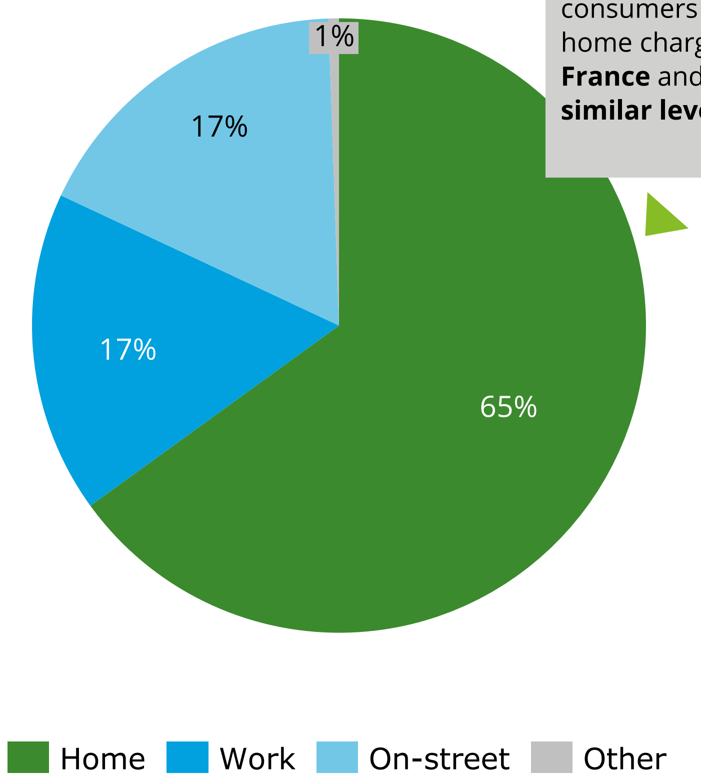
Key Insight* – *Older consumers *are the demographic who thinks expected range cannot meet their needs. However, they drive fewer long trips per month. It may reflect* ***hesitancy*** *and a preference to wait and observe how the technology evolves further*

Q53: How far would a fully charged all-battery EV need to go in order for you to consider acquiring one? Q18: How many times in the past month have you driven more than 60 miles or 100 kilometers from your home?; Q49: How long do you think it should take to charge an EV from fully discharged to 80% at a public charging location?

Sample size: n= 822 [Q53]; 760 [Q18]; 183 [Q49]

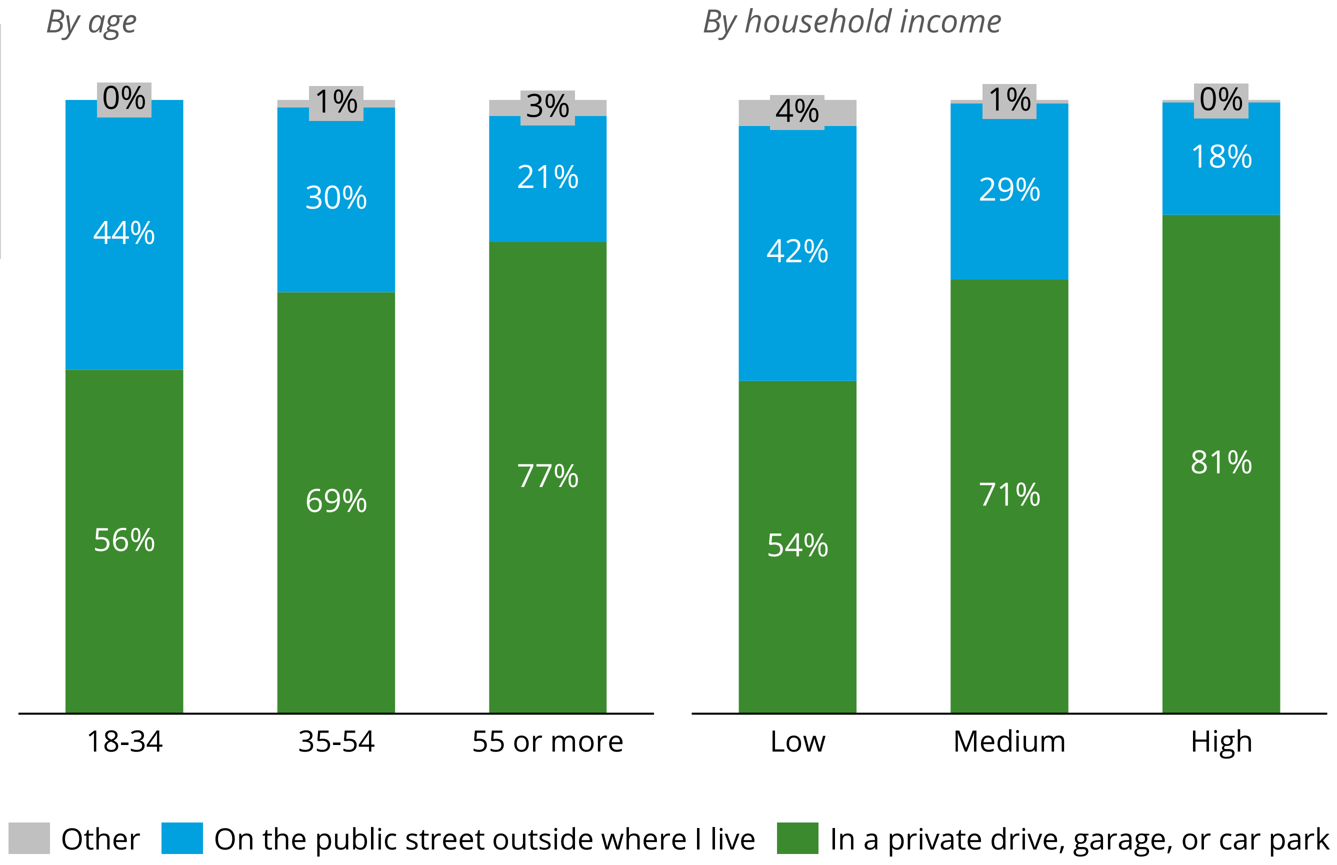
Most respondents plan to charge at home, but the fact that younger and low-income consumers often park on street, highlights the need for public charging infrastructure to support adoption

Expecting to charge electrified vehicle most often at…



Country insight – **80%** of consumers in the **UK** indicated home charging**, 71%** in **Germany**. **France** and **Netherlands** are on a **similar level** compared to Belgium

Overnight parking

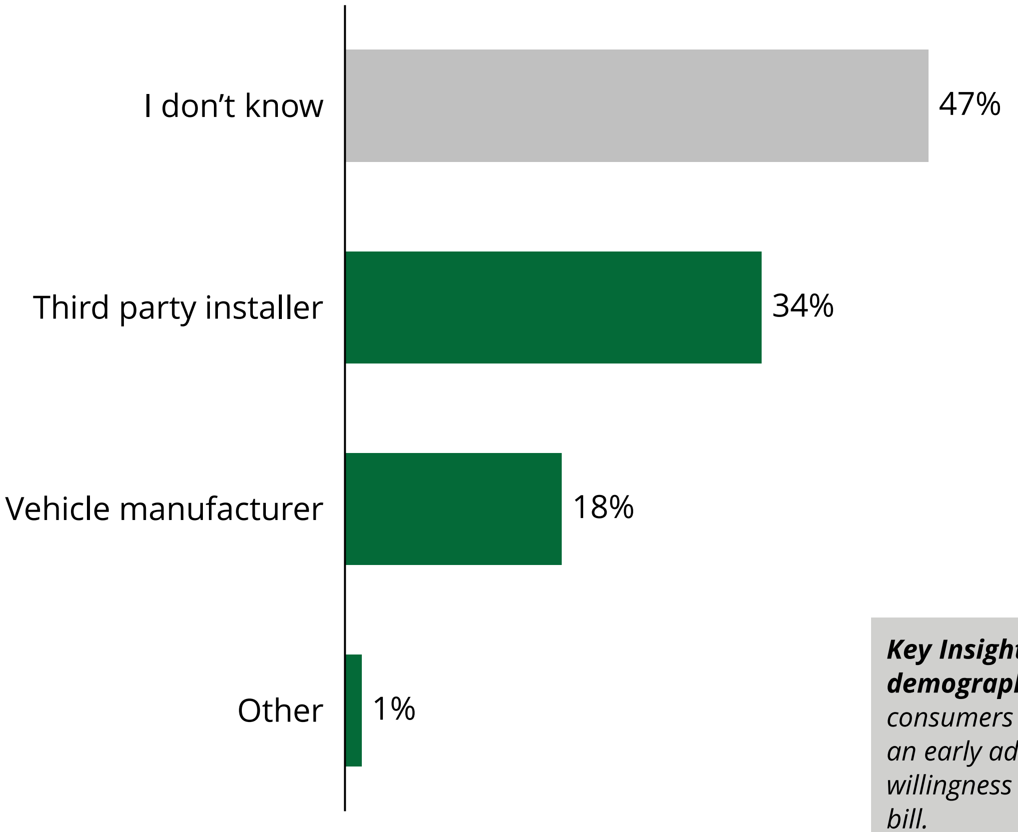


Q43: Where do you expect to charge your electrified vehicle most often?; Q71: Where do you usually park your current vehicle overnight?

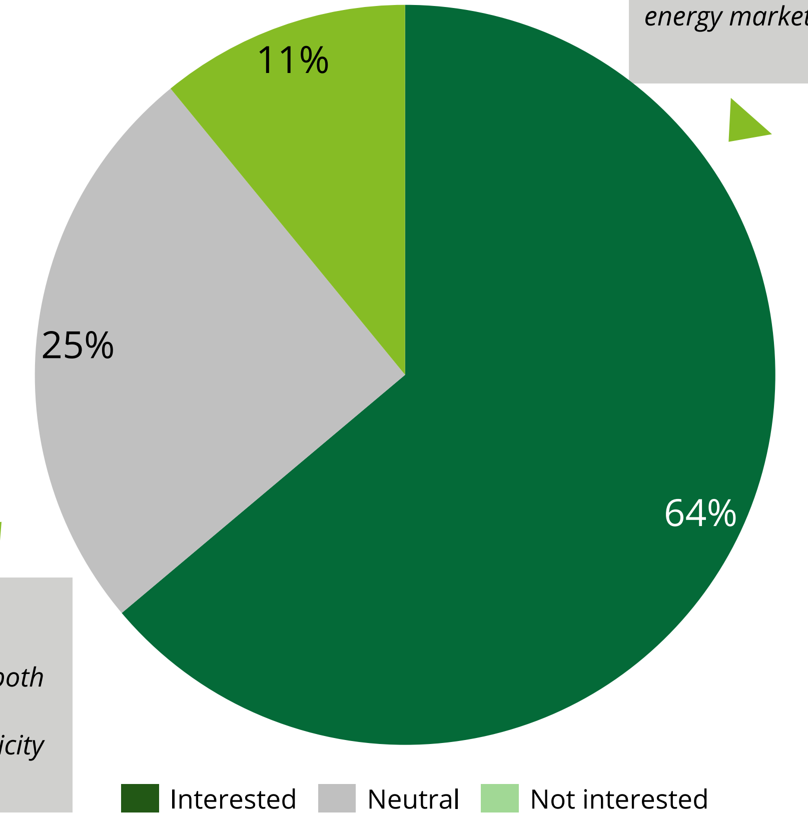
Sample size: n= 183 [Q43]; 999 [Q71]

Half of consumers lack knowledge on home charging, highlighting the need for accessible information. Many are also interested in using V2G solution to lower electricity bills

Consumers plan to purchase their home charger from…



Interest in V2G propositions



Country Insight *– Peer countries show similar results, except for the* ***UK****. Interest in V2G propositions there is at* ***75%****, influenced by their more mature energy market*

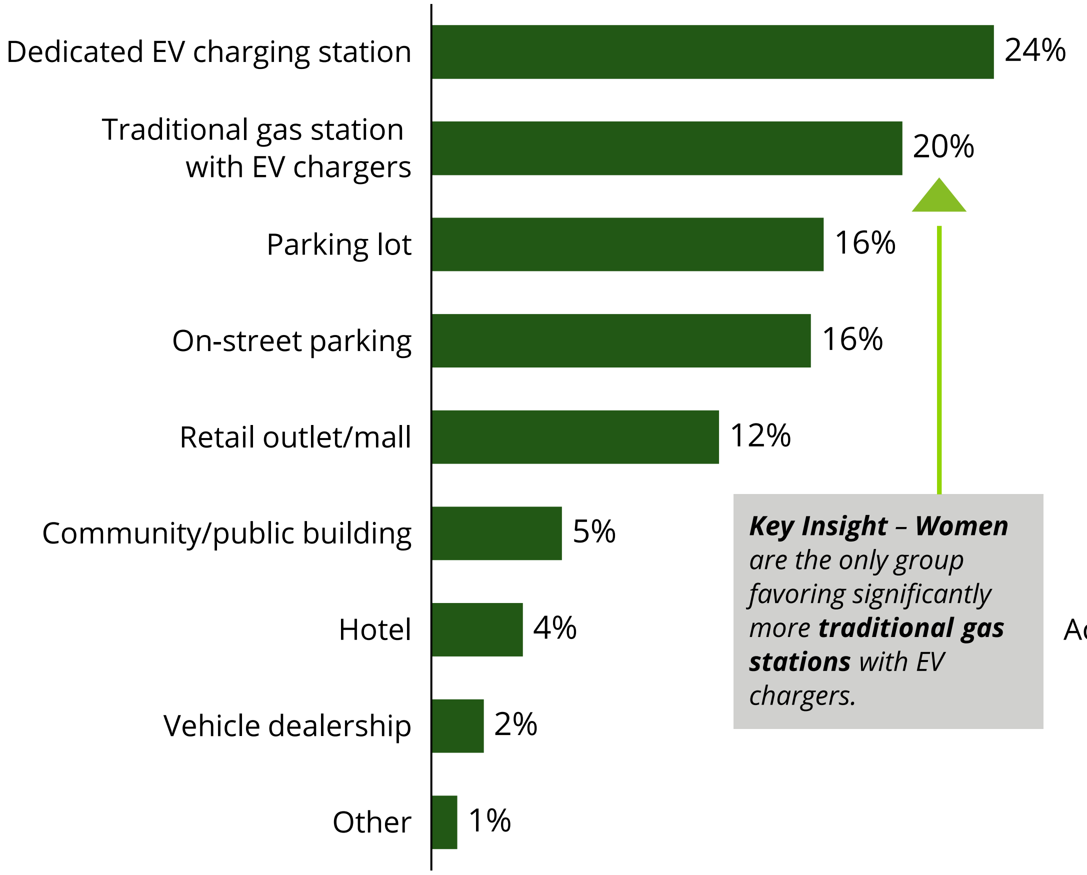
Key Insight *– Within the* ***younger demographic****,* ***82%*** *of surveyed consumers is interested, showing both an early adopter profile and the willingness to decrease their electricity bill.*

Q45. From whom do you plan to purchase a charger for your residence?; Q46: How interested would you be in returning excess energy from your vehicle to your electricity provider in exchange for monetary credits on your bill?

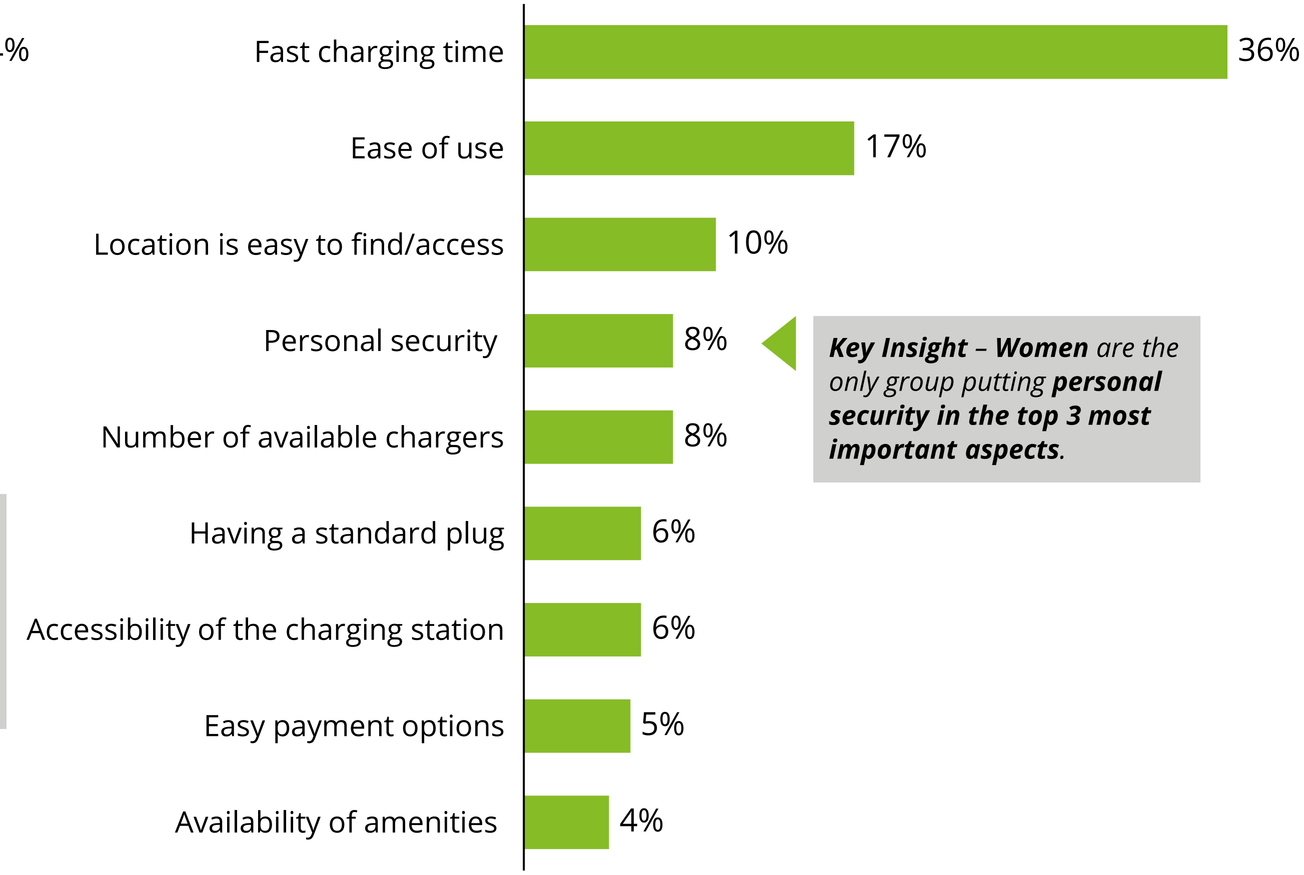
Sample size: n= 74 [Q45]; n= 119 [Q46]

Consumers prioritize fast charging times and prefer dedicated EV (fast-)charging stations for public charging while development of a safe public network is also important for women

Preference for public charging location



Most important aspect of an EV charging experience

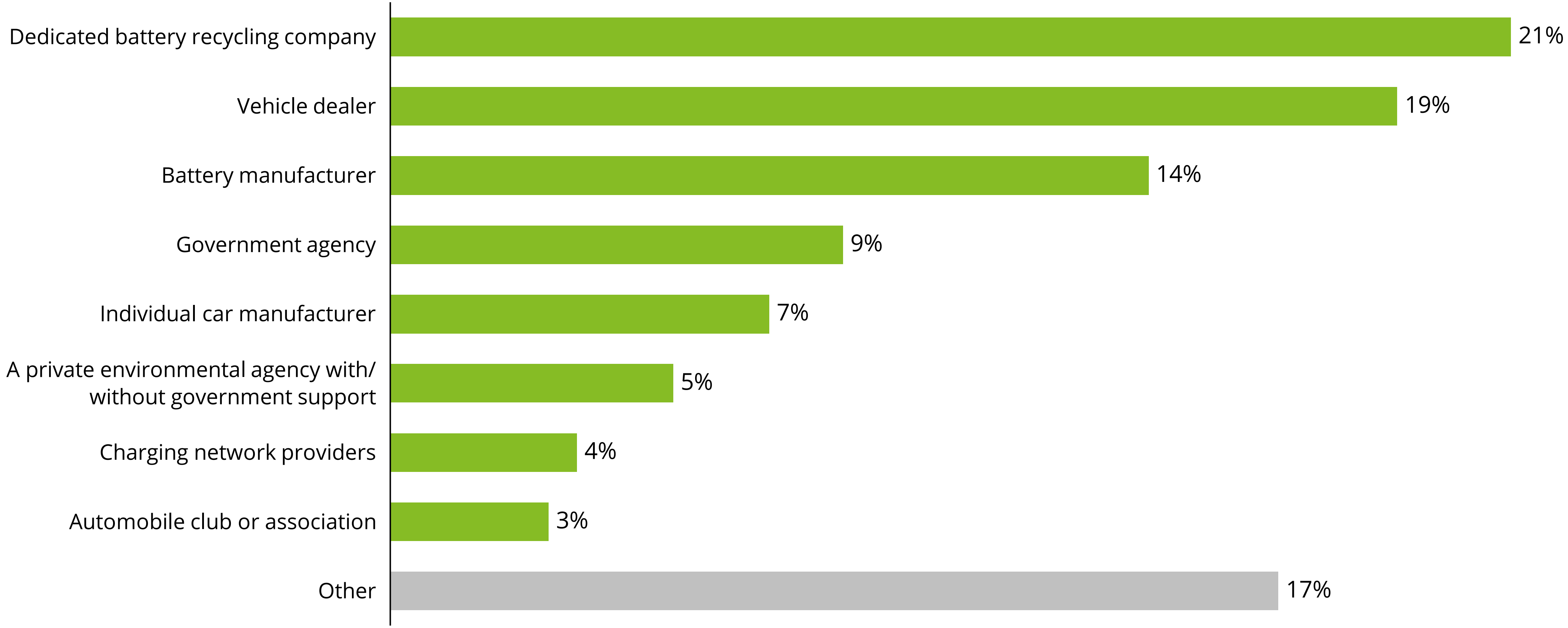


Q48. Where would you most want to charge your EV when you are away from home?; Q50. What is the most important aspect of an EV charging experience?

Sample size: n= 183 [Q48]; 183 [Q50];

Surveyed consumers believe dedicated battery recyclers or vehicle dealers should be primarily responsible for collecting, storing and recycling EV batteries

Entity that should be responsible for collecting, storing, and recycling EV batteries after their useful lives (% of respondents)



*Other includes 'other' and 'don't know' responses

Q55. Who do you think should be responsible for collecting, storing, and recycling EV batteries after their useful lives?

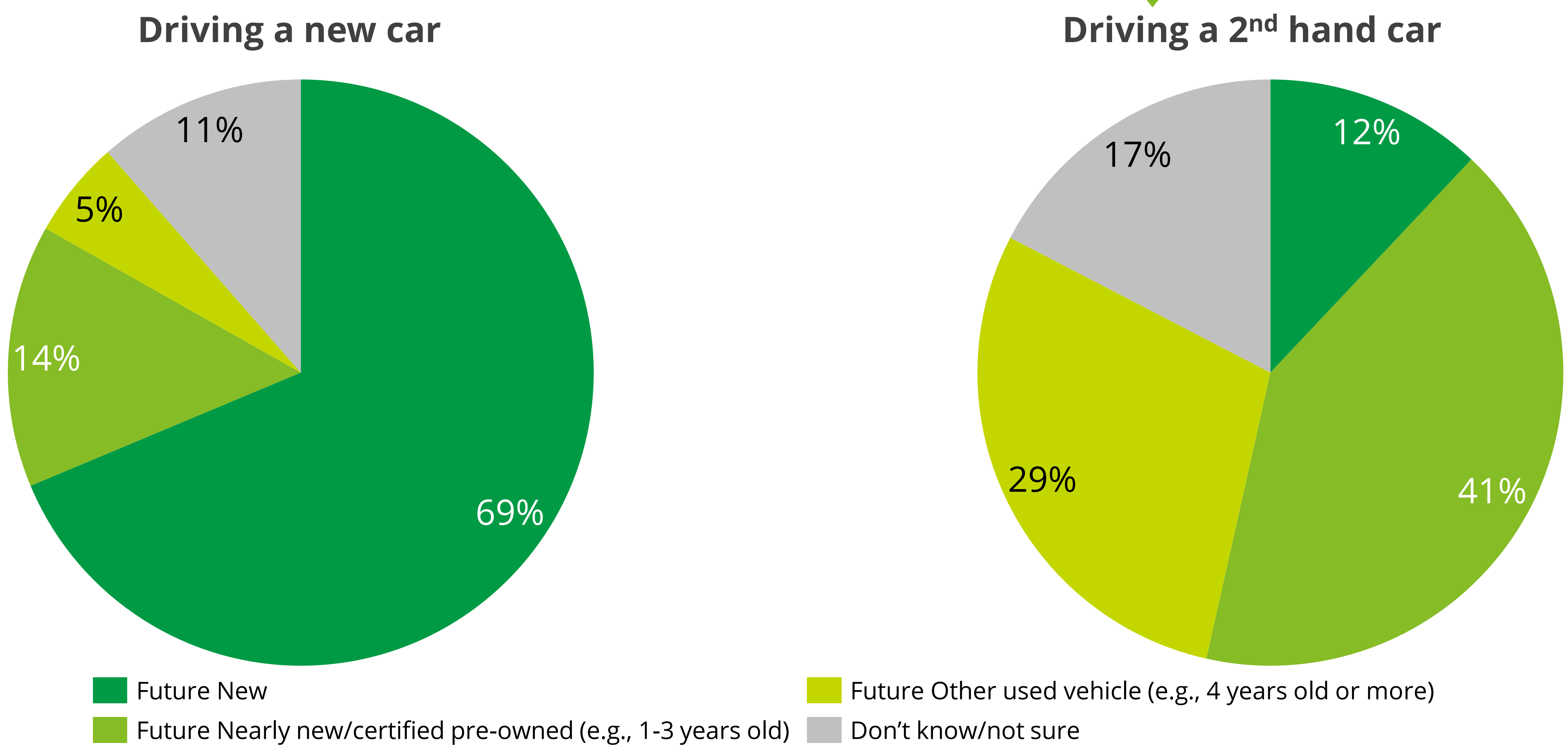
Sample size: n= 822 [Q53]; 760 [Q18]; 183 [Q49]

2 Future vehicle intentions

7 in 10 consumers intend to purchase the same type of vehicle as their current one as their next one

Key Insight *– the* ***younger people****,* ***women*** *and* ***low-income households*** *purchase more CPO & used cars, which might be linked to their purchasing power*

Next vehicle by current vehicle type



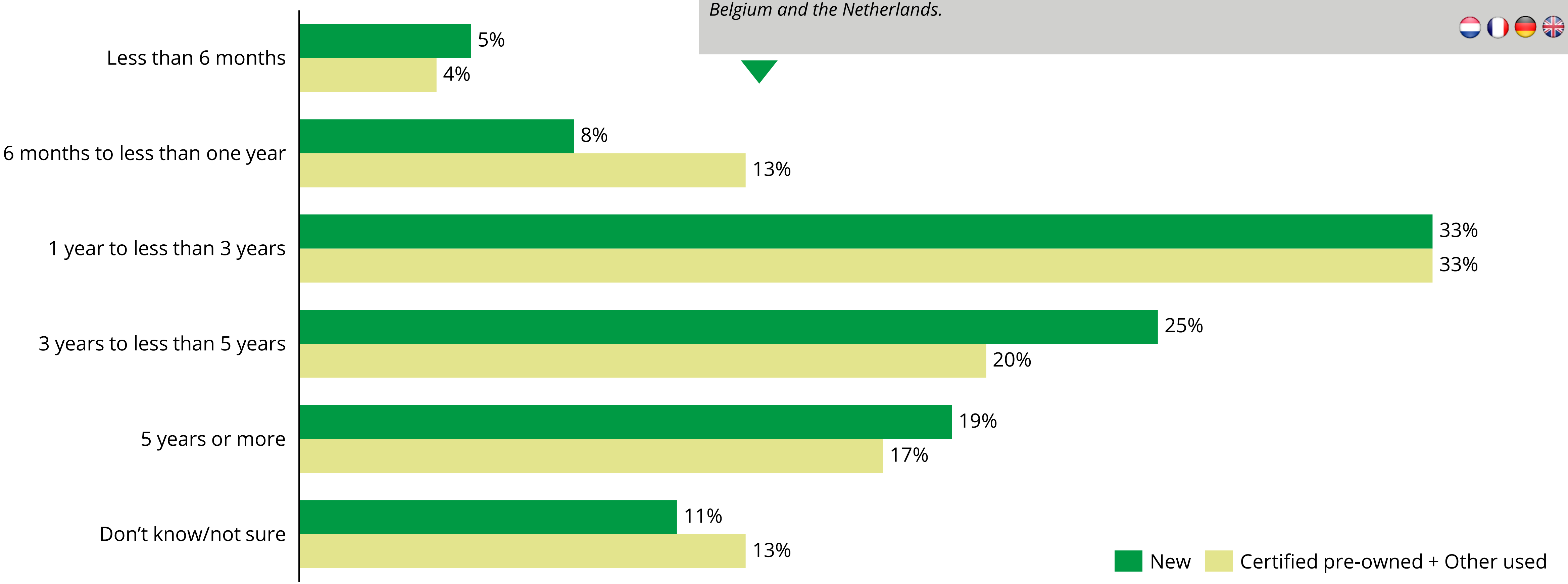
Q24. Will your next vehicle be new or used?

Sample size: n= 727

Less than 20% of consumers intend to buy their next vehicle within a year, while half plan to postpone their acquisition for 1 to 5 years, indicating that the private market still needs to pick up

Time before acquiring next vehicle

***Country Insight** – More than **20% of consumers in France, Germany**, and the **UK** plan to acquire their next **new vehicle within 6 months to 1 year**, while around **40% intend** to do so **within 1 to 3 years**. This indicates that the **private new passenger car market in these countries is more ready to pick up** versus Belgium and the Netherlands.*

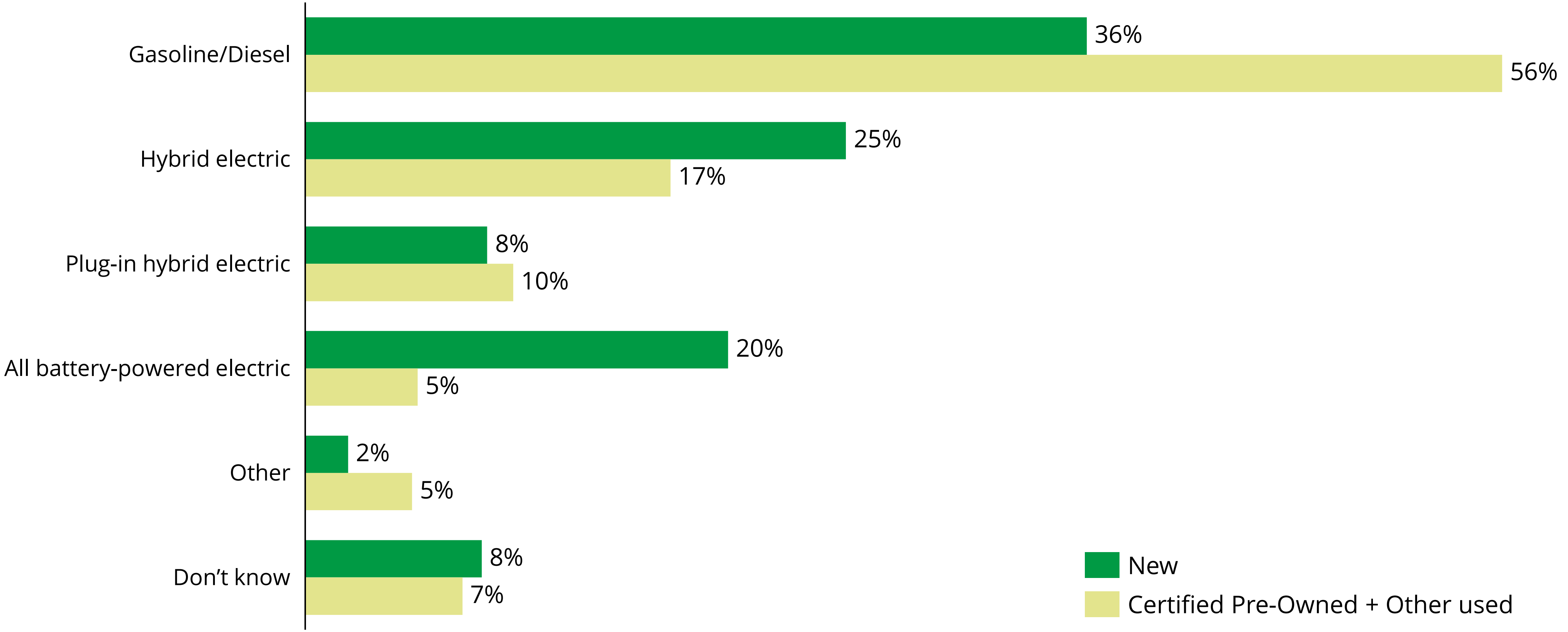


Q23. When do you expect to acquire your next vehicle?

Sample size: n= 793

Battery electric vehicles play a marginal role in the still-to-develop second-hand car market, which may cause adoption issues for demographics such as women and low-income households

Preference for type of engine by future vehicle type



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= 783

Consumers expect to pay between € 15,000 and €50,000 for new or EV cars with men aged 35 to 54 willing to pay more. On average, affordability remains a crucial factor

Expected price ranges for next vehicle

	Overall	New Car Intender	Used Car Intender	ICE Intender	EV Intender
Less than €10,000	10%	2%	19%	15%	6%
€10,000 to less than €15,000	15%	8%	21%	21%	8%
€15,000 to less than €30,000	33%	35%	32%	32%	35%
€30,000 to less than €50,000	25%	35%	19%	19%	36%
€50,000 to less than €75,000	7%	10%	4%	5%	9%
€75,000 or more	2%	3%	1%	2%	2%
Don't know/not sure	8%	7%	4%	6%	5%

70%

53%

53%

71%

Note: EV intender refers to BEV, PHEV and HEV

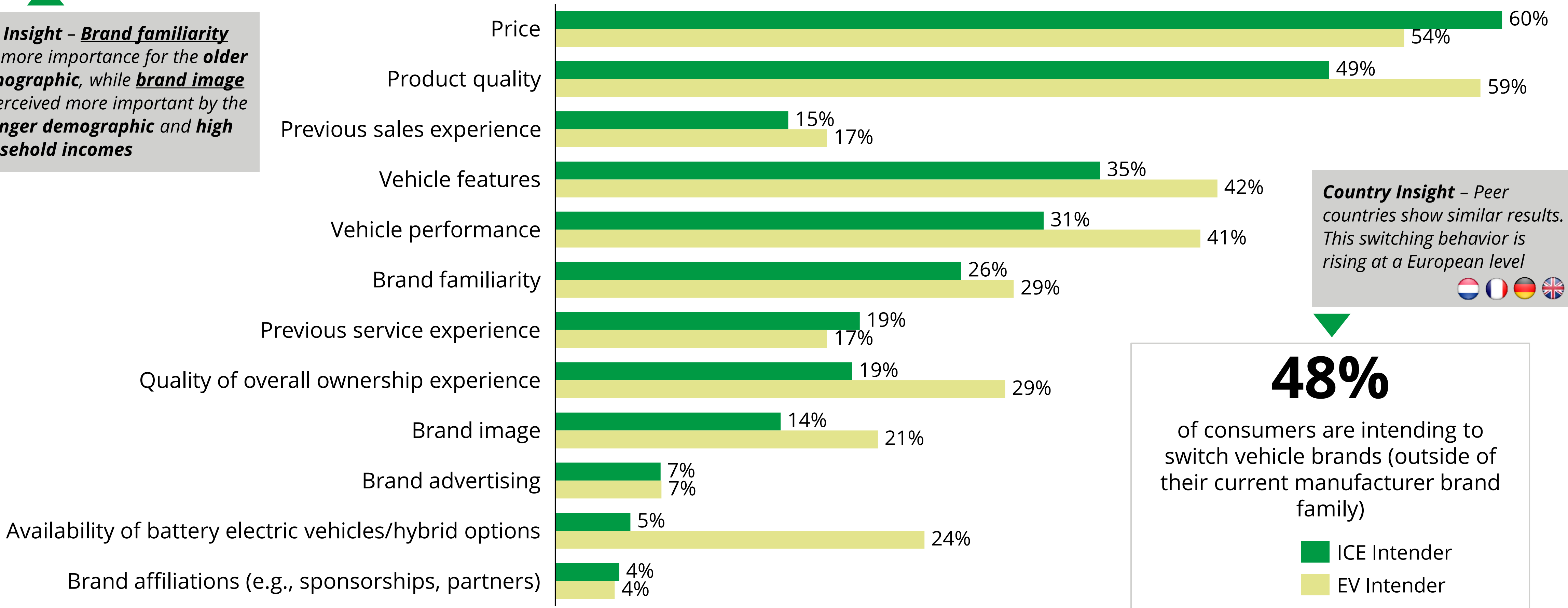
Q32. In which of the following price ranges will you be shopping for your next vehicle? (Please indicate what you would expect to pay after any discounts and/or incentives that might be available).

Sample size: [Overall] n= 925; [New Car Intender] n= 401; [Used Car Intender] n= 382; [ICE intender] n= 418, [EV intender] n= 370

Overall, price and product quality are the deciding factors for a consumer choosing either an EV or an ICE vehicle. Additionally, brand loyalty is perceived as less important to consumers

Most important factor driving the choice of brand for next vehicle

Key Insight *– **Brand familiarity** has more importance for the **older demographic**, while **brand image** is perceived more important by the **younger demographic** and **high household incomes***



Country Insight *– Peer countries show similar results. This switching behavior is rising at a European level*

48%

of consumers are intending to switch vehicle brands (outside of their current manufacturer brand family)

ICE Intender
EV Intender

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

Sample size: n= 760 [Q5]; n= 925 [Q26] n= 925 [Q29]

88% of respondents think its important for a brand to have strong sustainable commitments, although brand image ranks 8th as important factor driving the choice of brand for the next vehicle

Percentage of consumers who would give importance to vehicle brands that have a strong commitment to sustainable practices

Country Insight *– Importance of* ***sustainable practices*** *in peer countries is* ***around 85%****. As driving choice for switching vehicle brands, brand image ranges from 6th most important in France to 10th most important in the Netherlands*

Not important
12%

Somewhat important
38%

Important
35%

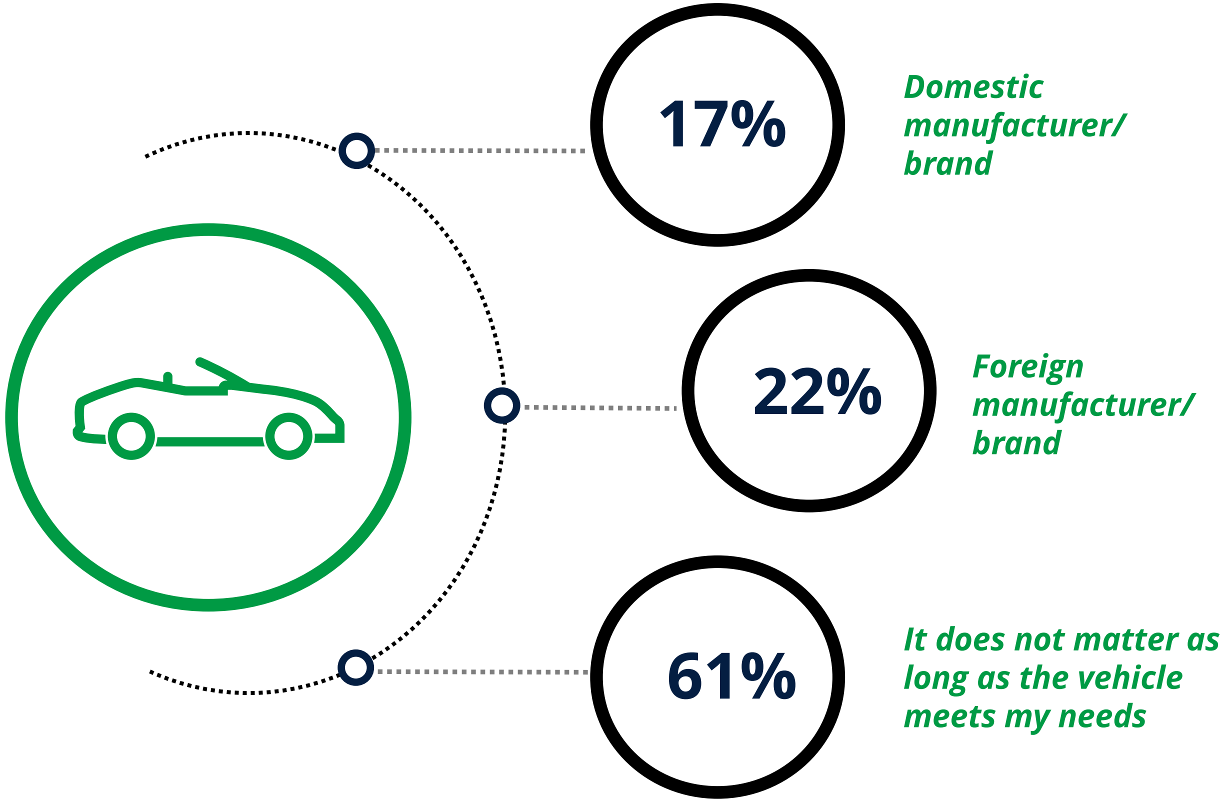
Very important
14%

Q30: When thinking about choosing your next vehicle, how important will it be for a vehicle brand to have a strong commitment to sustainable practices (e.g., low carbon manufacturing footprint, use of environmentally friendly materials, electrification strategy)?

Sample size: n= 925

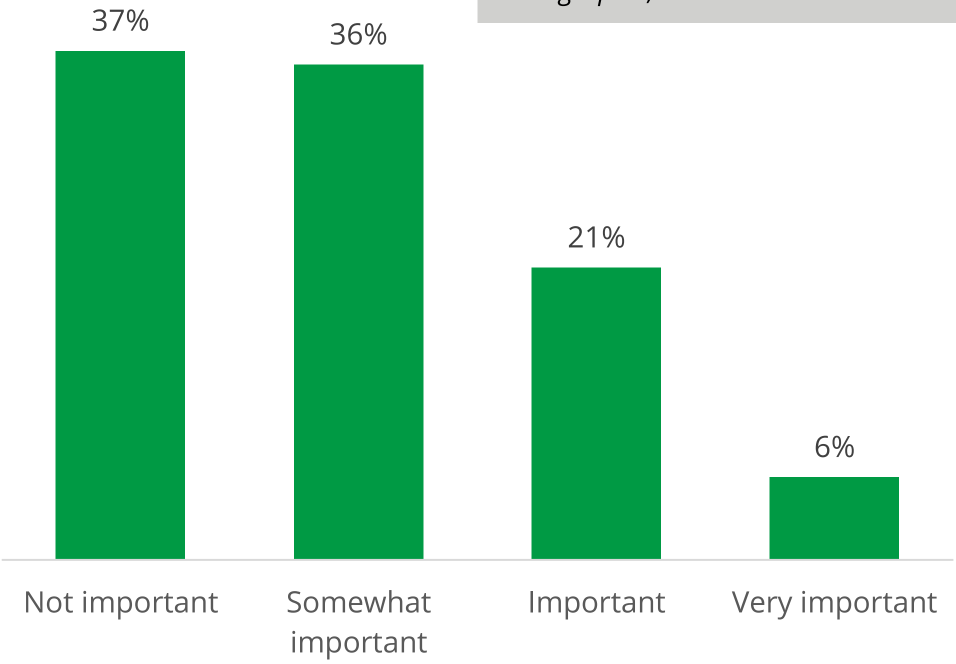
When it comes to consumer preference toward domestic and foreign brands, 6 in 10 consumers surveyed prioritize their needs before brand origin

Preferred organizations for next vehicle purchase



Percentage of consumers who give importance to local vehicle manufacturing (i.e., manufactured in your country or region)

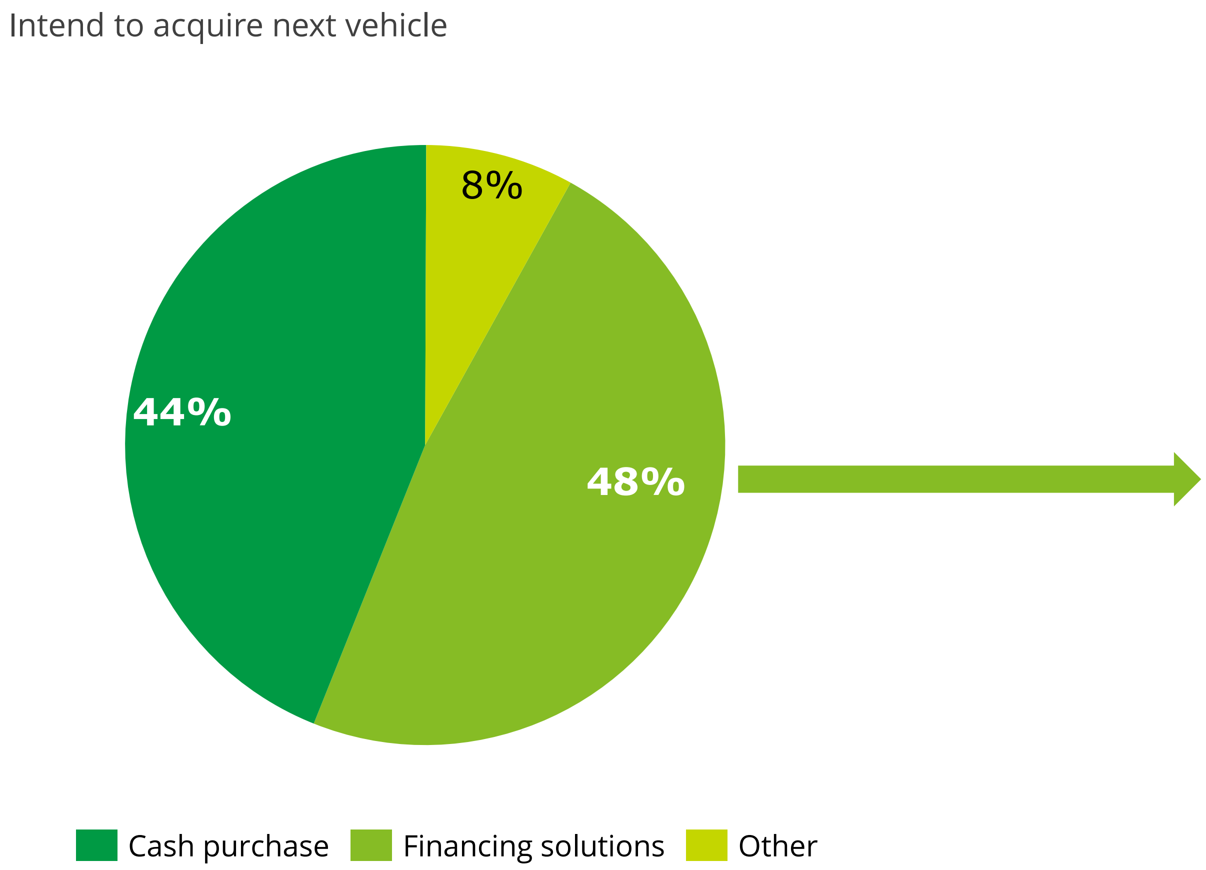
Key Insight *– Importance of* ***local vehicle manufacturing*** *is higher for the* ***younger*** *demographic,* ***women*** *and* ***urban dwellers***

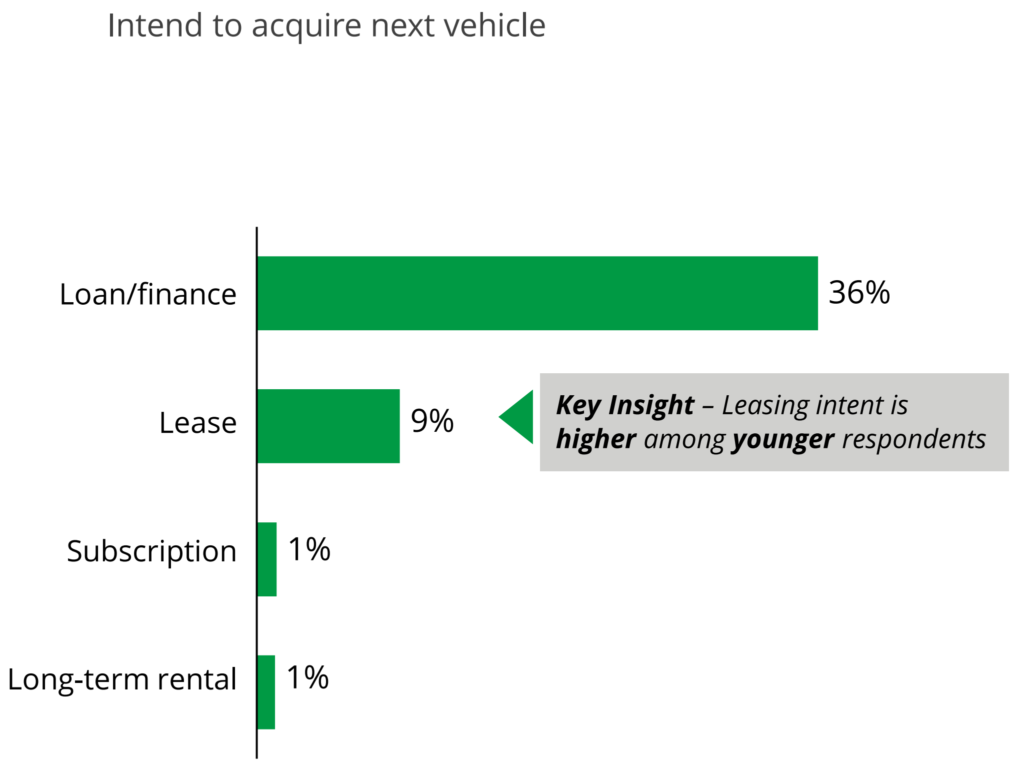


Q54: From which of the following type of organizations are you most interested in acquiring your next vehicle?; Q31: To what extent is it important that your next vehicle be locally manufactured (i.e., manufactured in your country or region)?

Sample size: n= 925 [Q54]; 925 [Q31]

Consumers favor financing options, but cash and loans remain the preferred methods for acquiring the next vehicle. Private leasing is limited, though higher among younger people



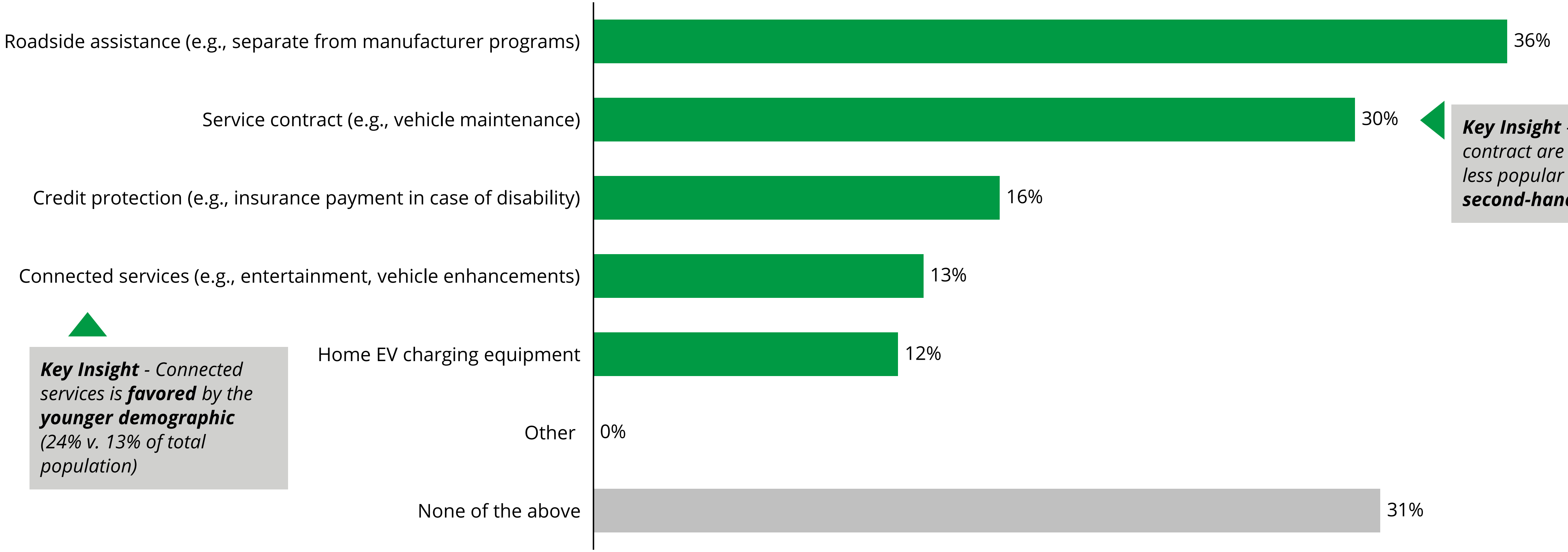


Q34. How do you intend to acquire your next vehicle?; Q35. What is your preferred loan duration (in months)?; Q36. What is your preferred lease duration (in months)?

Sample size: n= 925 [34]; n= 337 [Q35]; n= 86 [Q37]

Roadside assistance is the preferred additional service. However, 1 out 3 consumer see no need for the proposed services

Most important additional services that consumers plan to purchase, or subscribe to, when acquiring their next vehicle



Key Insight *– Service contract are significantly less popular among* ***second-hand car buyers***

Key Insight *- Connected services is* ***favored*** *by the* ***younger demographic*** *(24% v. 13% of total population)*

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

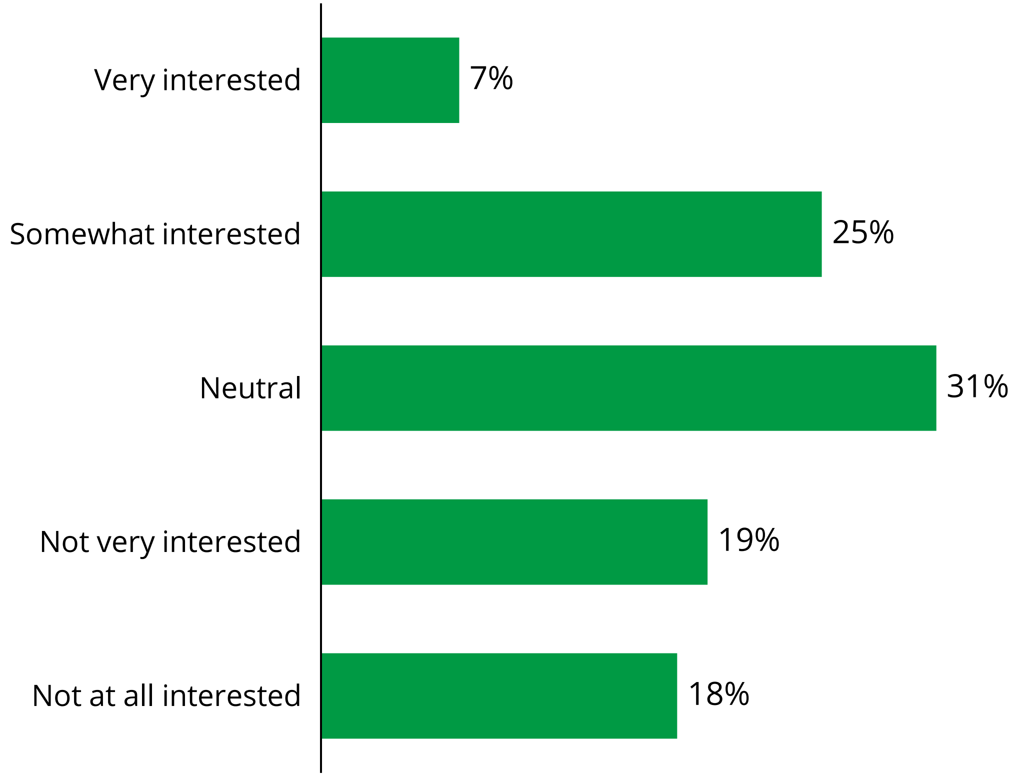
Q37. Which of the following additional services do you plan to purchase, or subscribe to, when acquiring your next vehicle? (Please select all that apply.)

Sample size: n= 925

Dealerships remain key for vehicle acquisition, as consumers prefer in-person interaction but the next generation values physical engagement less and show interest in online process

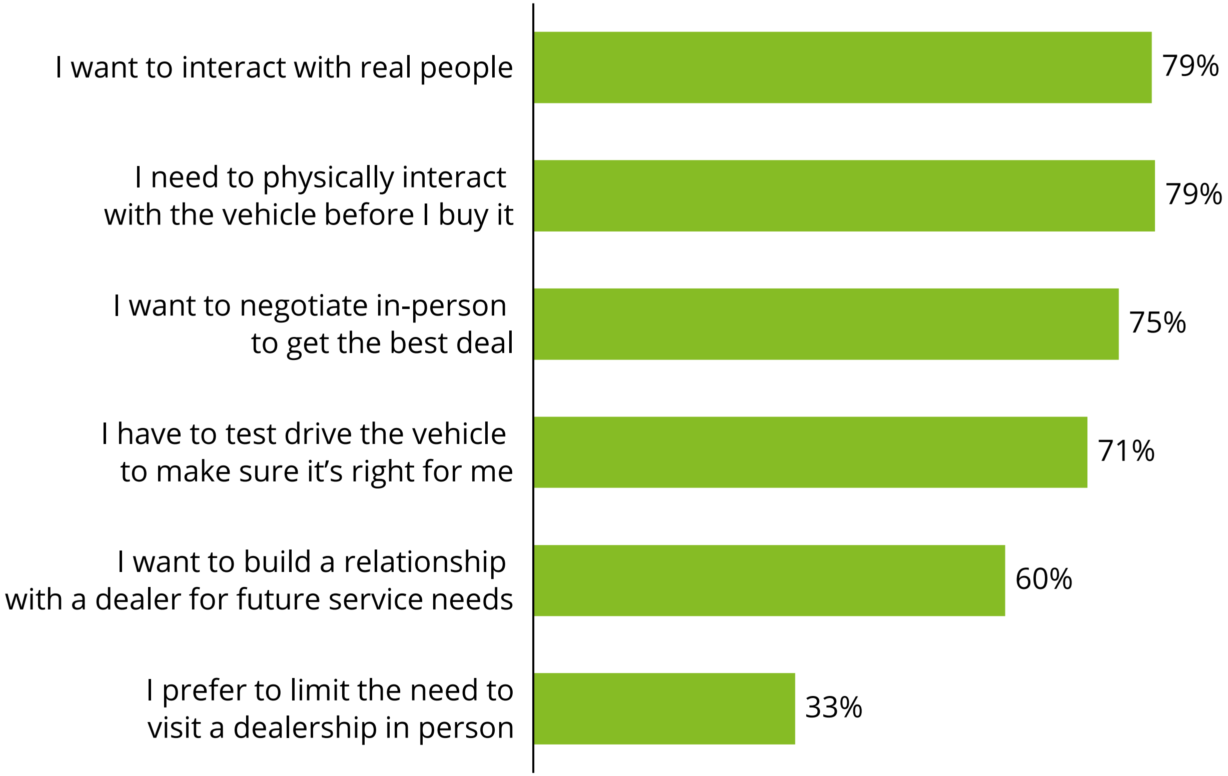
Interest in acquiring vehicle directly from the manufacturer (via an online process)

Key Insight – Younger, urban consumers and consumers aged 35 to 54** are significantly more interested by the **online process



Level of agreement on various aspects of the purchase experience (% somewhat/ strongly agree)

***Key Insight – Younger consumers** score significantly **lower** on the top 4 categories*



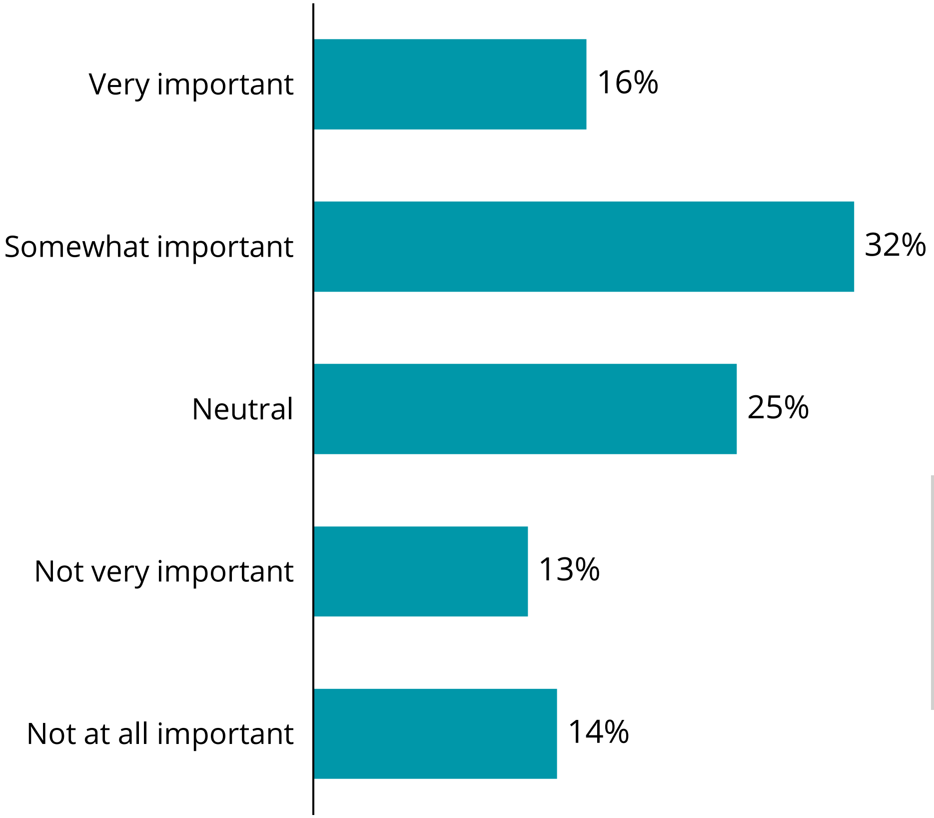
Q61. To what extent are you interested in acquiring your next vehicle directly from the manufacturer (via an online process)? Q40: Thinking about the next time you acquire a vehicle, to what extent do you agree or disagree with the following statements?

Sample size: n= 925 [Q61]; 925 [Q40]

3 Connectivity

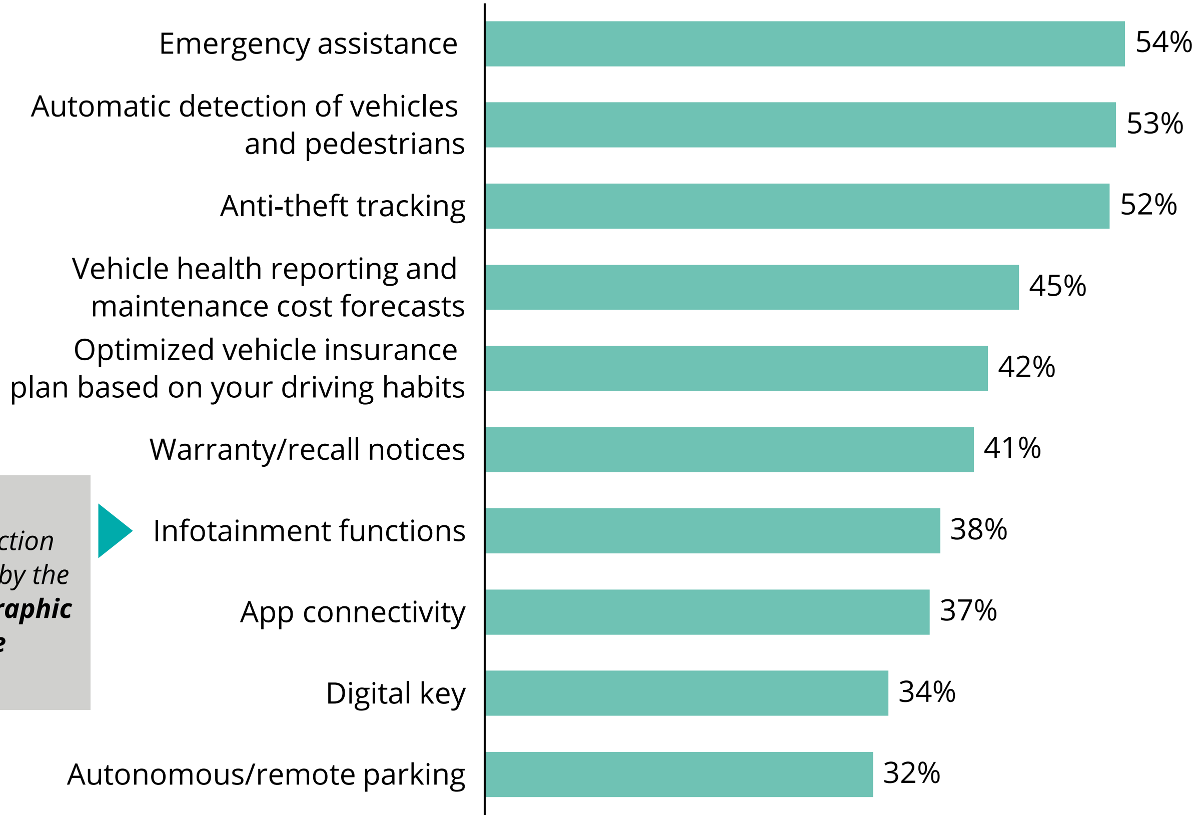
While car manufacturers are attempting to introduce their own connected service ecosystems, consumers still believe their next vehicle should be able to connect with their smartphone

Importance of vehicle connectivity with smartphone



Willingness (somewhat willing + very willing) to pay extra for connected services

Key Insight *– Infotainment function is more* ***favored*** *by the* ***younger demographic*** *and* ***high-income*** *households.*



Q58. How important will it be for your next vehicle to connect with your smartphone via Apple CarPlay or Android Auto? Q57. To what extent would you be willing to pay extra for each of the following connected vehicle services?

Sample size: n= 925 [Q58]; 925 [Q57]

Consumers trust dealers and OEMs the most when it comes to managing collected vehicle data. However, 1 out of 5 consumers still do not trust anyone to handle their data

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

Management of vehicle data					
Vehicle dealer	**31%**	17%	26%	**30%**	13%
Car manufacturer	16%	22%	13%	22%	23%
Insurance company	13%	7%	6%	10%	10%
Government agency	7%	10%	7%	5%	7%
Financial service provider	4%	4%	2%	3%	4%
Cloud service provider	3%	3%	2%	6%	6%
Cellular service provider	3%	4%	3%	3%	4%
Automobile club or association	3%	7%	2%	2%	4%
Other	0%	0%	1%	1%	0%
None of the above	20%	**26%**	**39%**	18%	**30%**

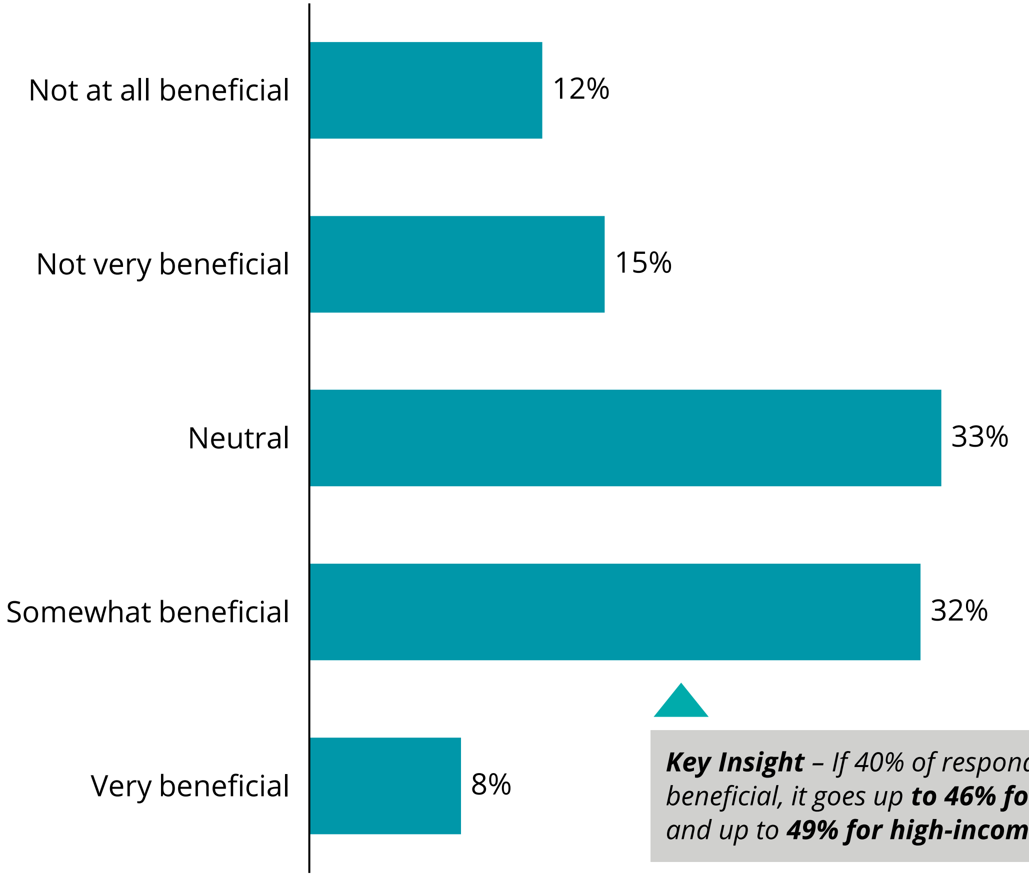
Top response

Q59. Who do you trust most to access and manage the data your vehicle generates?

Sample size: n= 925 [BE]; 1.306 [DE]; 919 [NL]; 886 [FR]; 1.314 [UK]

Consumers see the value of adding artificial intelligence in vehicle systems, however they are concerned about fully autonomous (commercial) vehicles

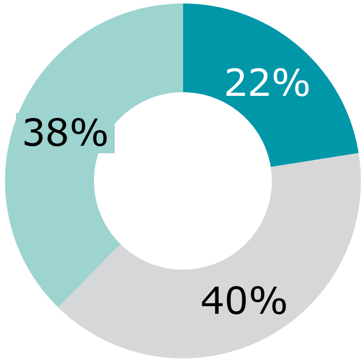
Addition of artificial intelligence in vehicle systems



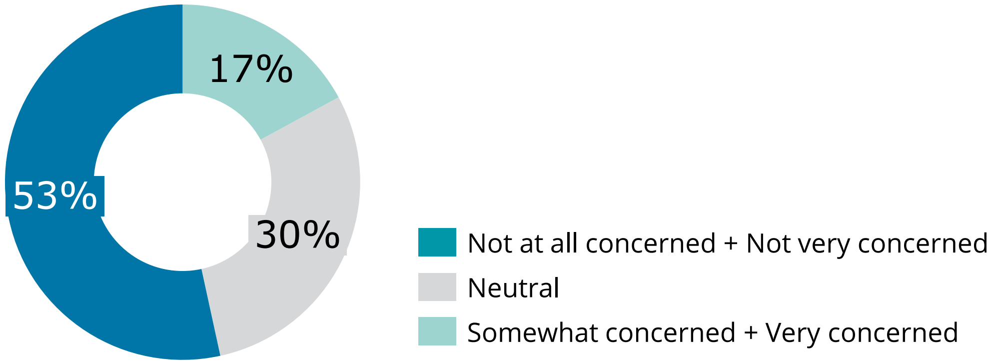
Key Insight** – If 40% of respondents find AI beneficial, it goes up **to 46% for younger people** and up to **49% for high-income household

Concern about…

Fully autonomous robotaxi services



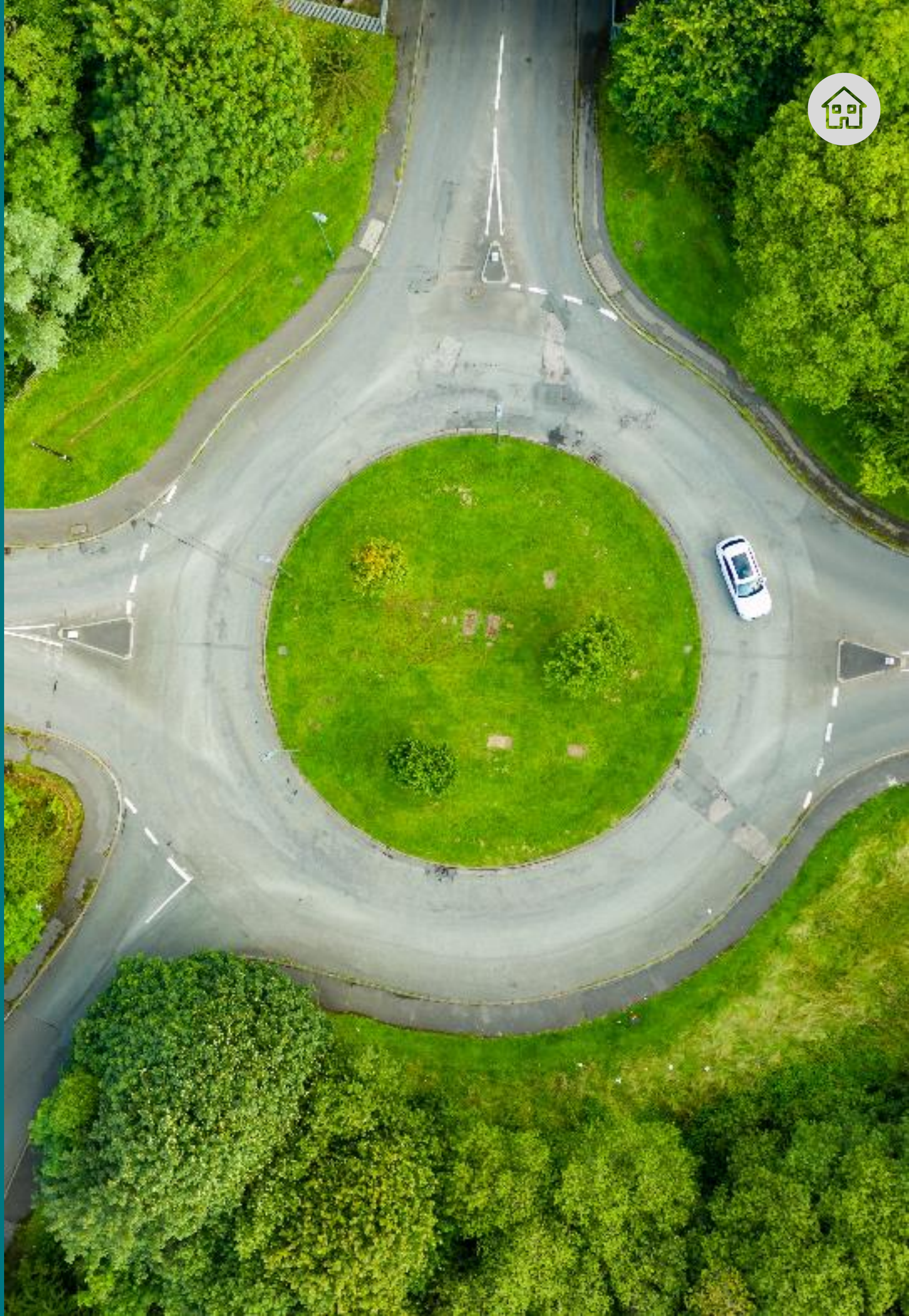
Commercial vehicles operating in a fully autonomous mode



Q59. Who do you trust most to access and manage the data your vehicle generates? Q56. To what extent are you concerned with each of the following scenarios?

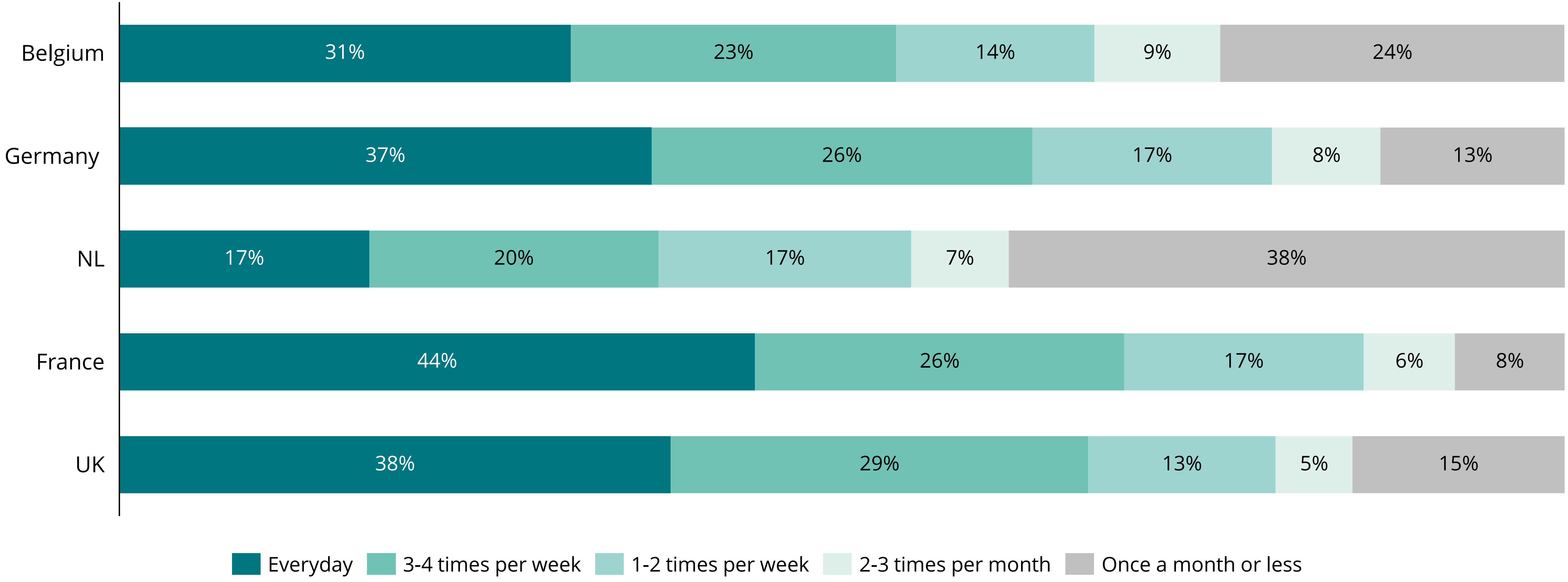
Sample size: n= 925 [59]; 925 [Q56]

4 Private Vehicle Ownership



The car remains central to Belgian mobility, with a weekly usage of 68%. However, 1 in 4 Belgians drive their vehicle once a month or less, indicating many cars remain idle

Frequency of driving personal vehicle

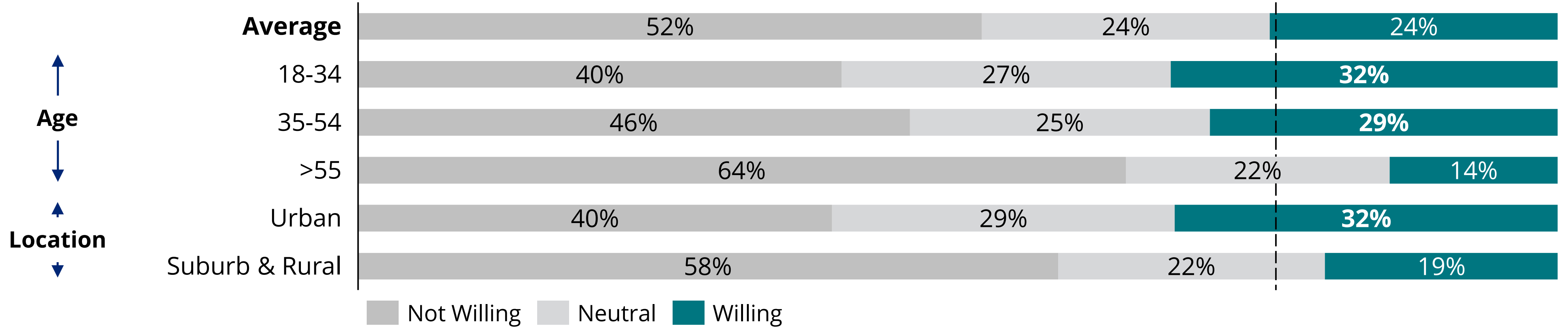


Q70. How often do you drive your current vehicle?

Sample size: n= 999 [BE]; 1.507 [DE]; 1.024 [NL]; 1.014 [FR]; 1.505 [UK]

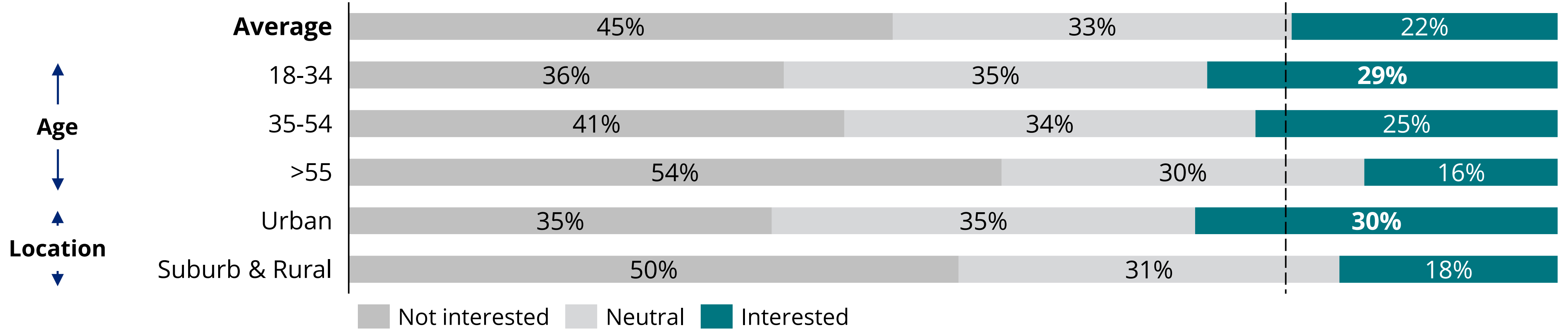
Owning a car is still important, especially for older people. However, the next generation of consumers and urban dwellers are more inclined to favor flexibility over car ownership

Willingness to give up vehicle ownership in favor of mobility-as-a-service



Key Insight – 52% of respondents are not ready to give up their car for a full Mobility-as-as-service package. However, almost 1 out of 3 young consumers and urban dwellers are interested.

Interest in giving up vehicle ownership in favor of a vehicle subscription



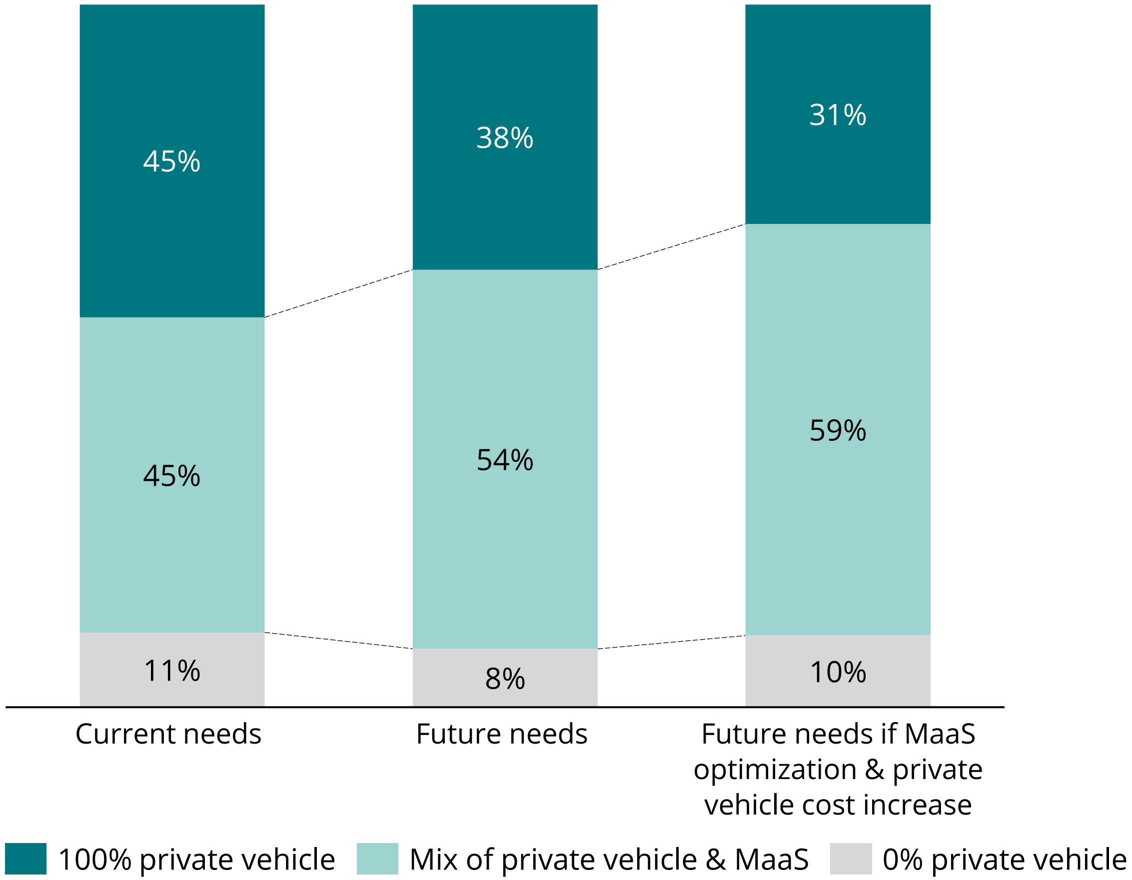
Key Insight – 52% of respondents are not ready to give up their car for a full Mobility-as-as-service package. However, almost 1 out of 3 young consumers and urban dwellers are interested.

Q63. To what extent would you be willing to give up vehicle ownership in favor of a fully available mobility-as-a-service (MaaS) solution going forward? Q69. To what extent are you interested in giving up vehicle ownership in favor of subscribing to the use of a vehicle going forward?

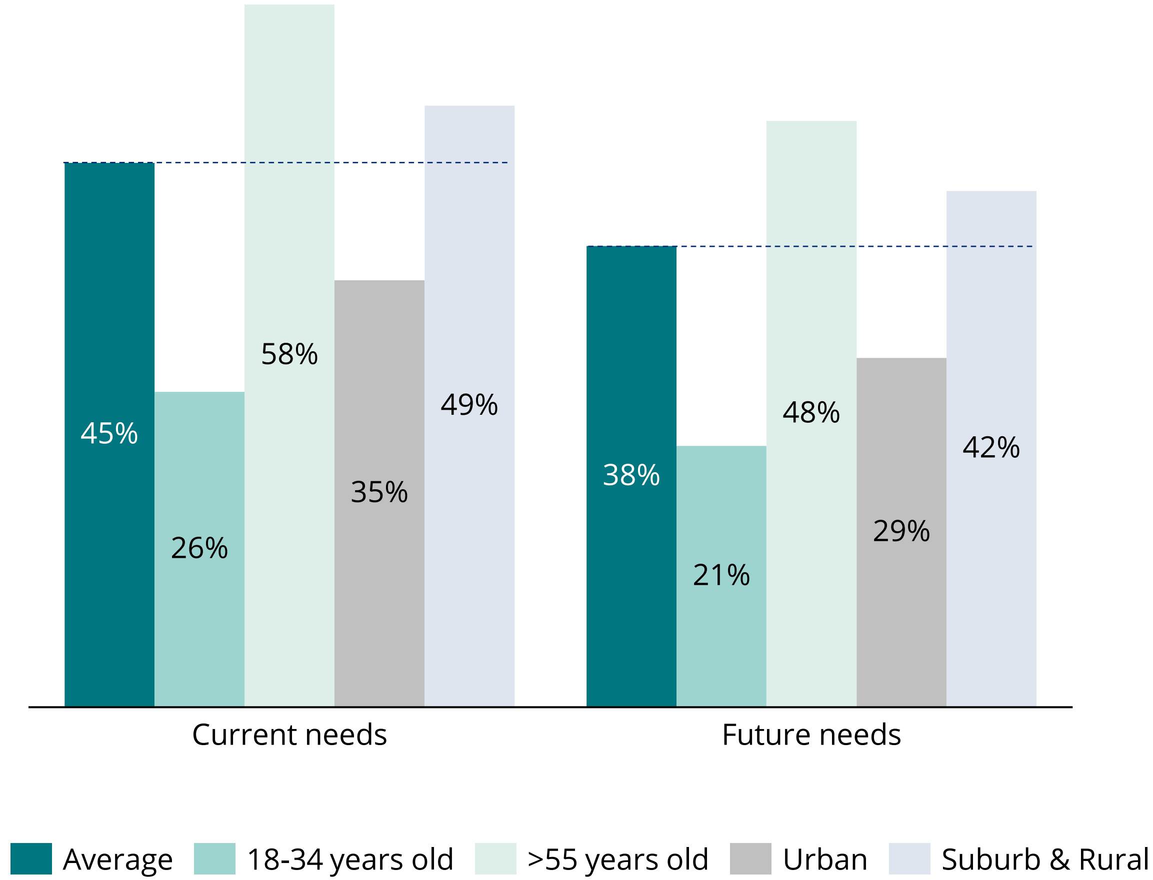
Sample size: n= 999 [Q63]; 999 [Q69]

Car remains king with other mobility solutions on top. But young people and urbanites needs flexibility, while rising cost of private car and optimizing MaaS could drive a mobility shift

Percentage of current & future (+5 years) mobility needs addressed by private vehicle vs. MaaS



Percentage of current & Future mobility needs addressed solely by private vehicle by age category & location



Q65. Currently, what percentage of your overall mobility needs would you prefer to address with the following types of transportation? Q66. Ideally, what percentage of your overall mobility needs would you like to address with the following types of transportation in five years? Q67. Ideally, what percentage of your overall mobility needs would you like to address with optimized mobility solutions like MaaS in five years, assuming the cost of private vehicle usage significantly increases (e.g., road pricing, parking fees, taxes)?

Sample size: n= 999 [Q63]; 999 [Q65]; 999 [Q66]; 999 [Q67]

5 About the study

About the study

Survey timing

October to December, 2024

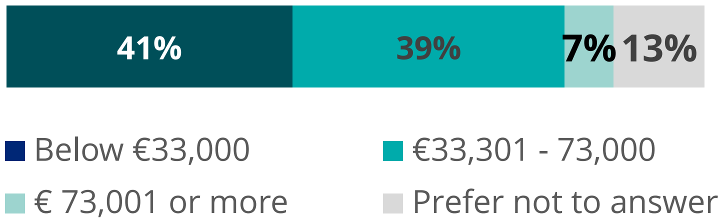
Sample

The survey polled a sample of 999 private consumers in Belgium.

Methodology

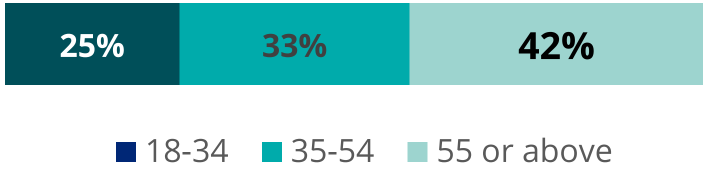
The study is fielded using an online panel methodology where consumers of driving age are invited to complete the questionnaire via email.

Household Income

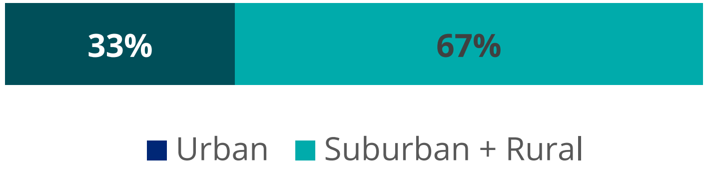


Gender

Age Group



Location



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