



2022 Global Automotive Consumer Study

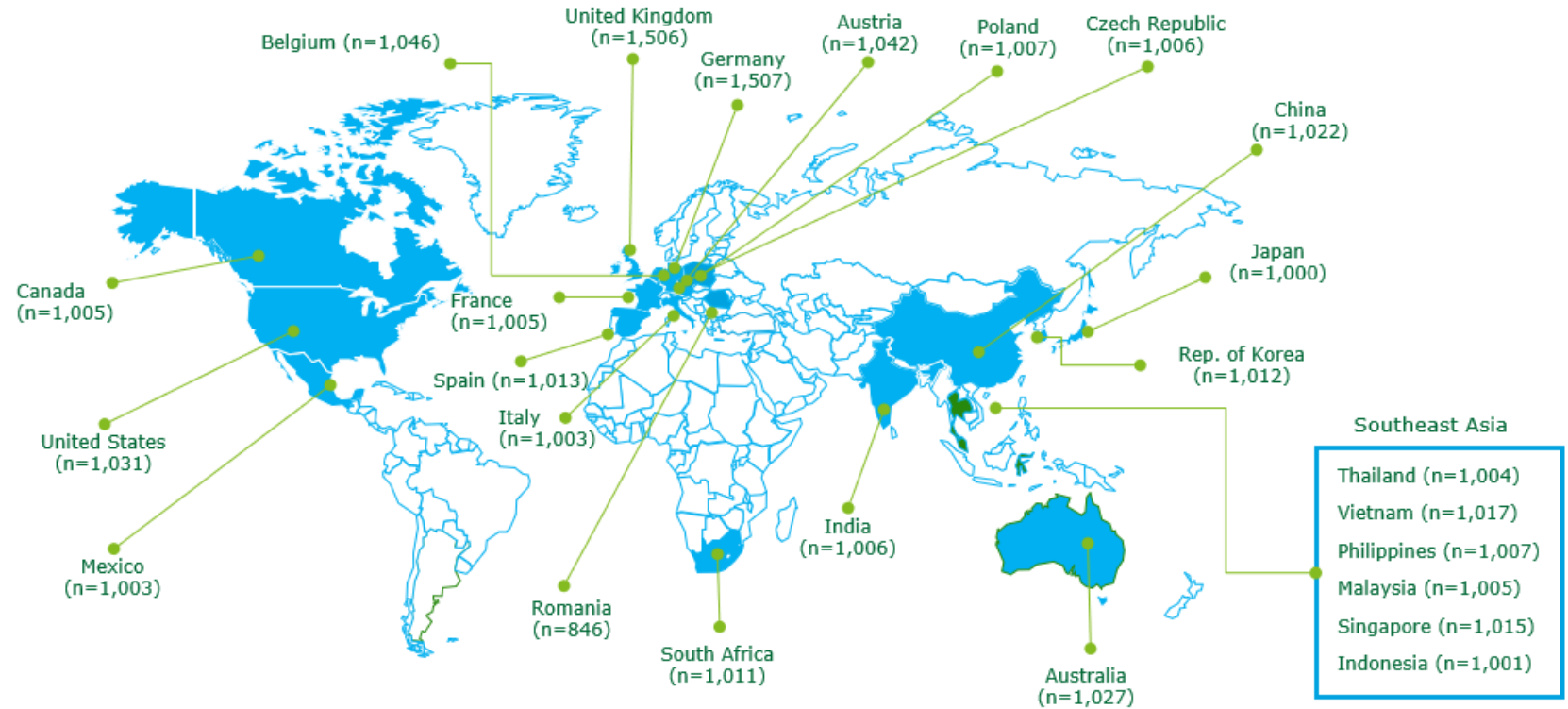
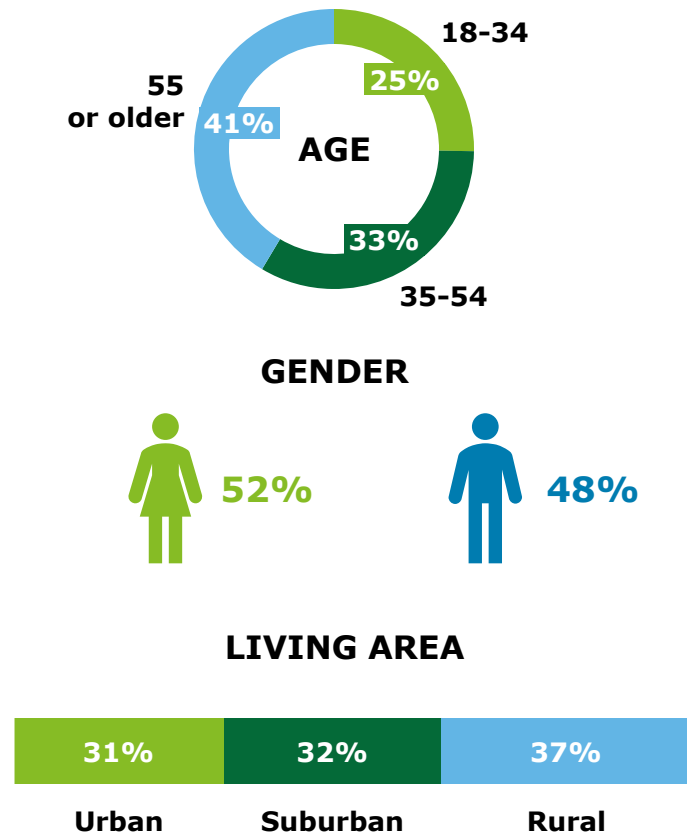
Belgium | Key Findings

January 2022

Study Methodology

The 2022 Deloitte Global Automotive Consumer Study surveys more than 26,000 consumers in 25 countries, including 1,046 Belgians, to explore opinions regarding critical automotive and mobility issues

Belgium Sample Distribution



Study 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.

Note: "n" represents the number of survey respondents in each country.

Deloitte's Global Automotive Consumer Study addresses three key themes that will shape the future of automotive



- 1** | What type of vehicle will consumers prefer to buy?
Focus on electrification and other advanced technologies
- 2** | What are the purchasing habits of consumers?
Focus on when, where and how will consumers purchase their next vehicle
- 3** | What type of mobility services do consumers prefer?
Focus on mobility apps

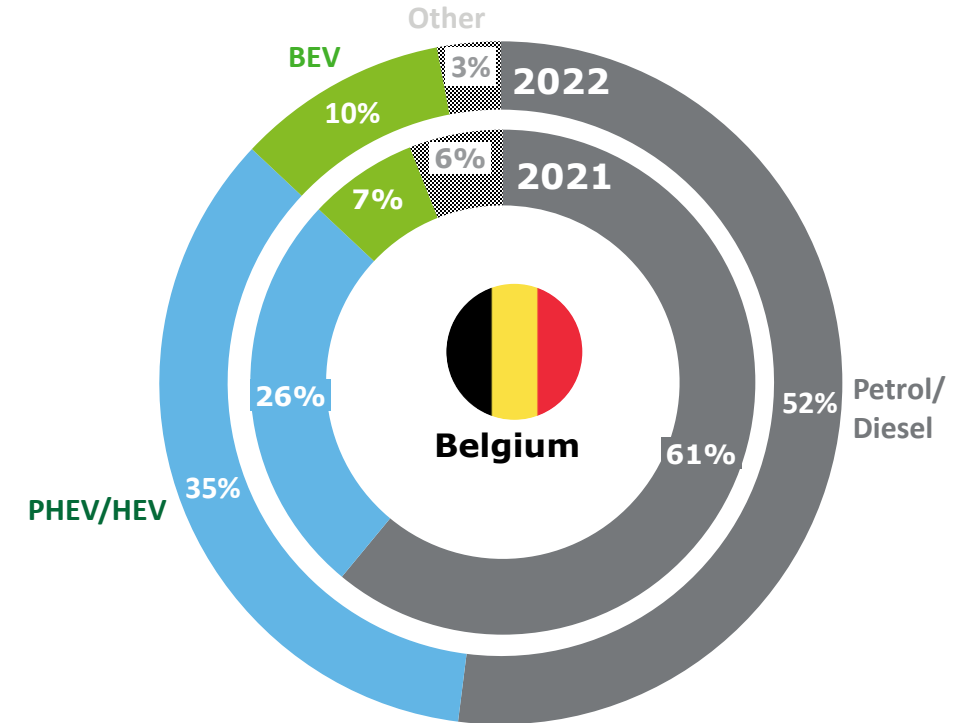
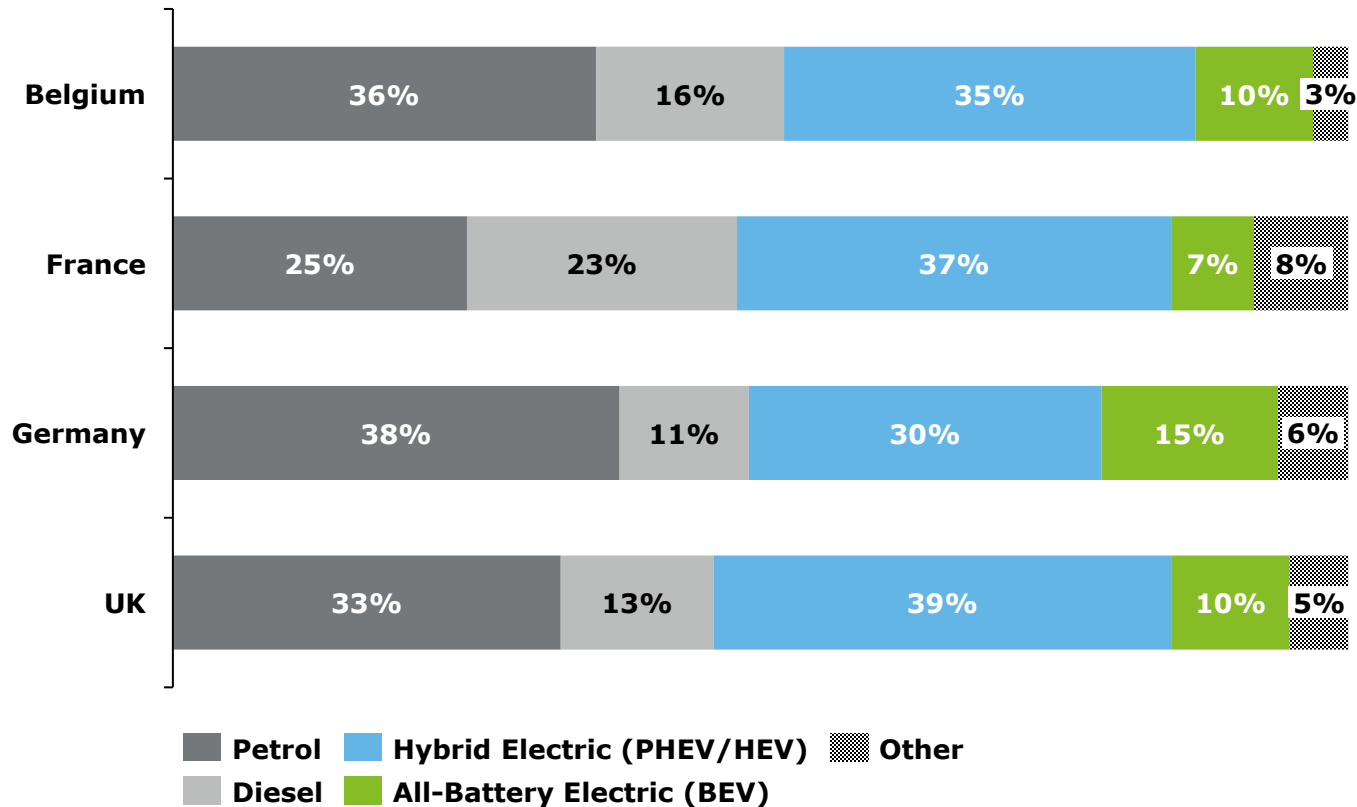
1 | What type of vehicle will consumers prefer to buy?



Focus on electrification

One in two Belgians plan to buy an electric or hybrid vehicle next

Consumer powertrain preferences for their next vehicle



Note: "Other" includes engine types such as compressed natural gas, ethanol, and hydrogen fuel cells; did not consider "don't know" responses

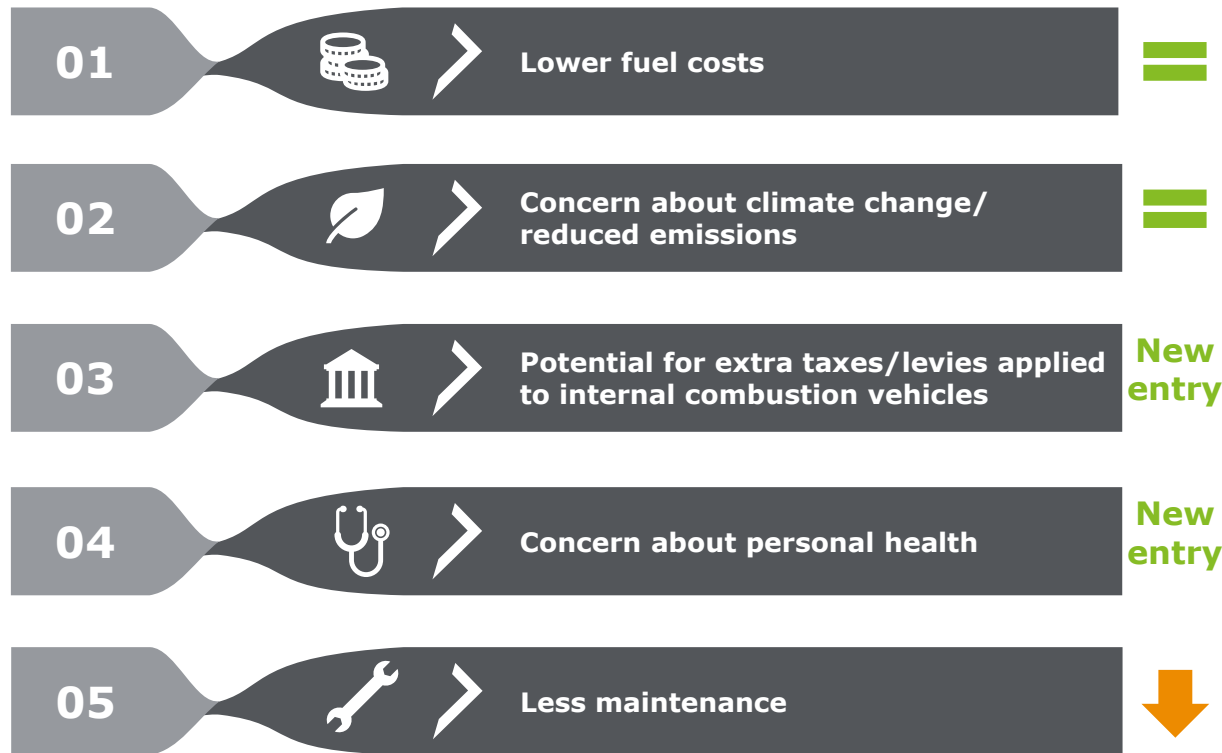
Q25. What type of engine would you prefer in your next vehicle?

Sample size: Belgium - [2022] - n= 769; [2021] - n= 825; France - n= 749; Germany - n=1,150; UK - n=1,226

Lower fuel costs is the #1 factor for choosing EV, but 46% would rethink their purchase decision if the rising price of electricity tops the price of fossil fuel

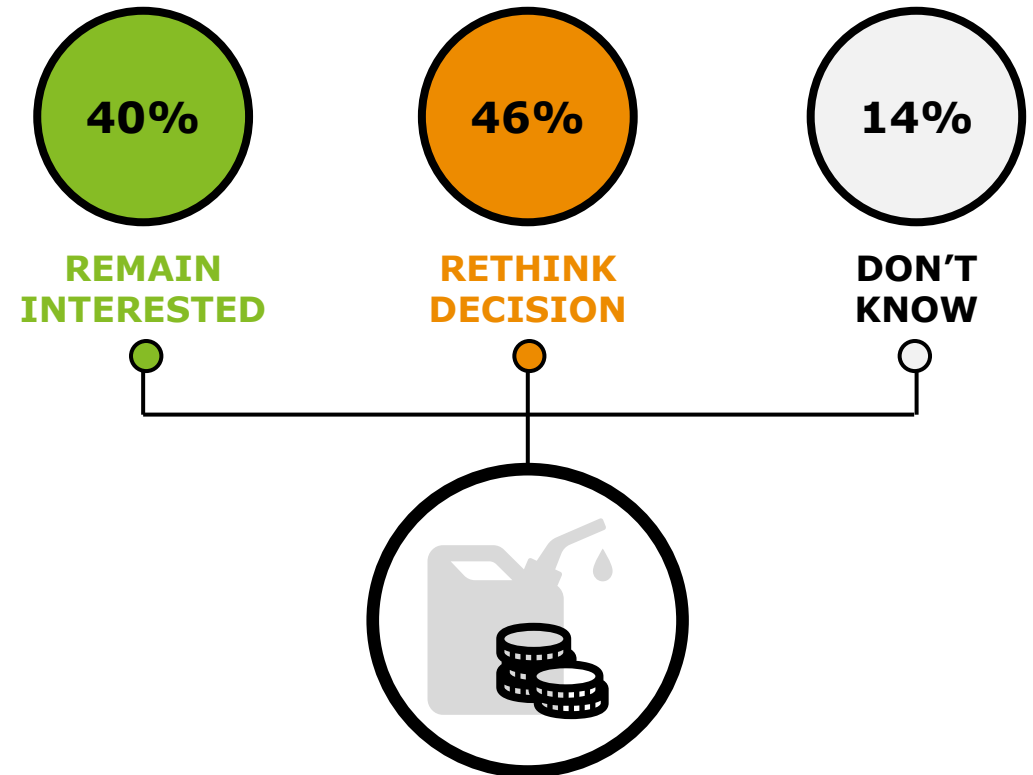
Ranking of factors in terms of their impact on Belgian consumers decision to acquire an electrified vehicle (highest to lowest)

2021



Q26. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).
Sample size: n= 344

Decision impact to purchase an EV if the electricity prices for mobility would reach fossil fuel levels

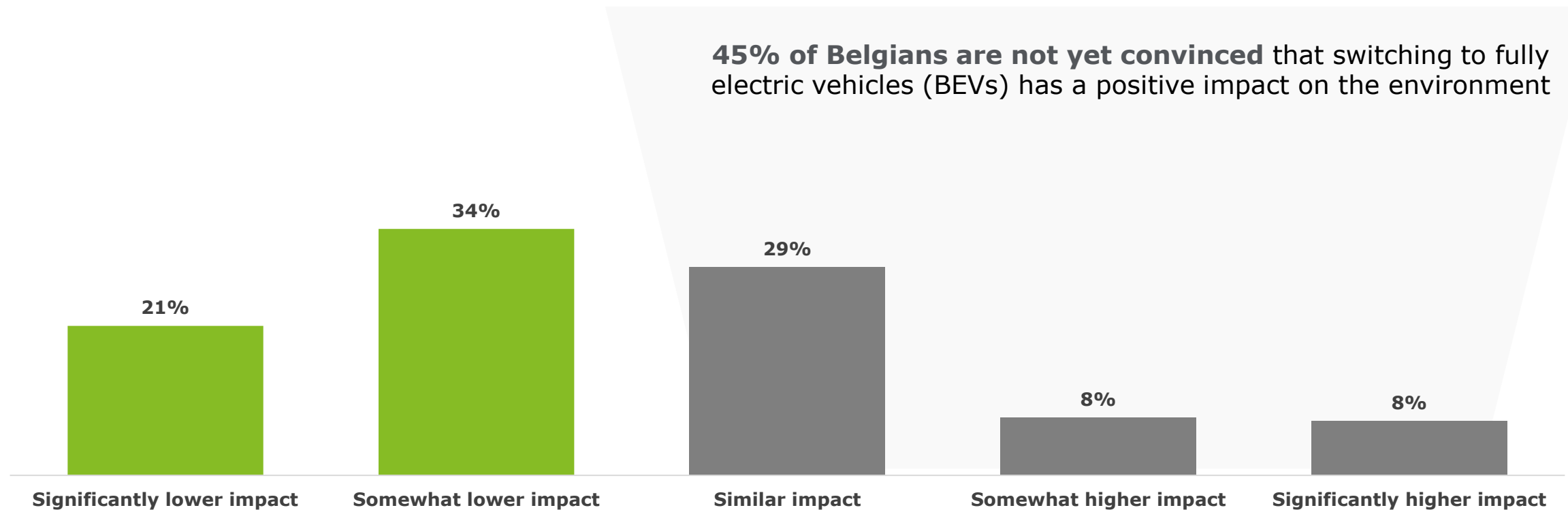


Q30. Would your decision to purchase an electrified vehicle change if the electricity used for mobility was priced similar to current fossil fuels?
Sample size: n= 166

Belgium

Nearly 1 in 2 Belgians are not yet convinced that switching to fully electric vehicles (BEVs) has a positive impact on the environment

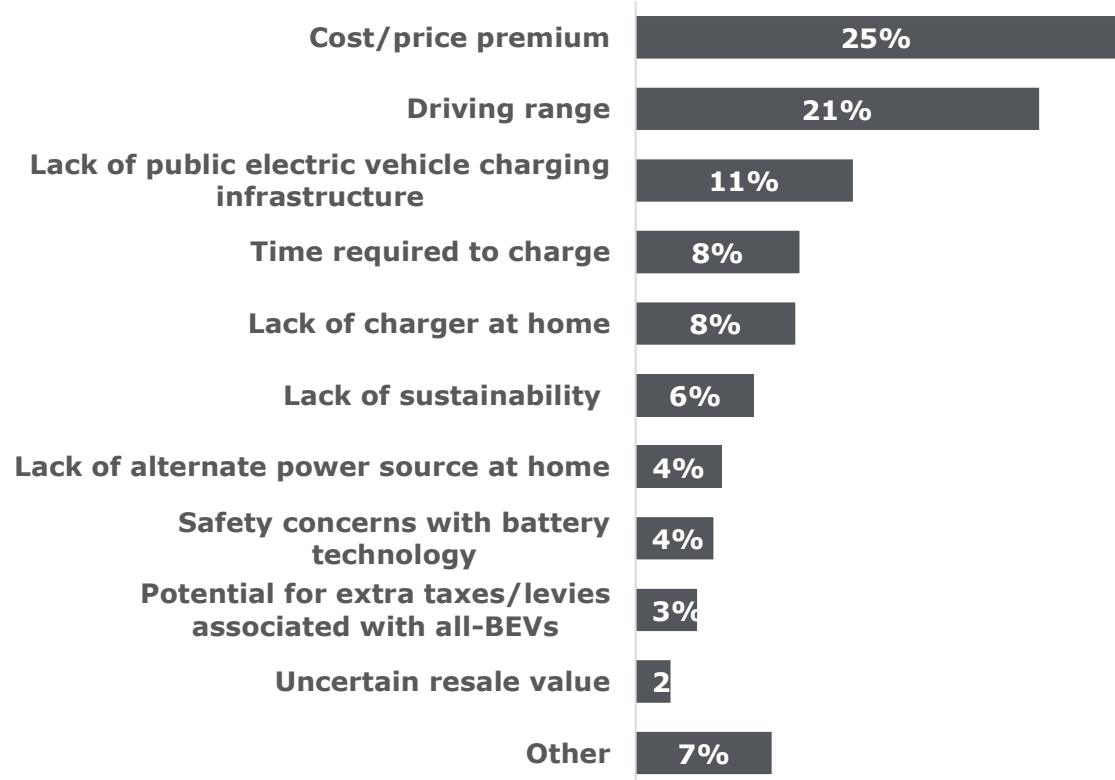
Environmental impact EVs vs Petrol/Diesel vehicles



Note: Did not consider "Don't know" responses
Q33. In your opinion, how do all-battery electric vehicles compare to internal combustion vehicles from an environmental impact point of view?
Sample size: n= 781

Belgian consumers' top concerns remain unchanged, although range anxiety is decreasing as BEV autonomy continues to improve

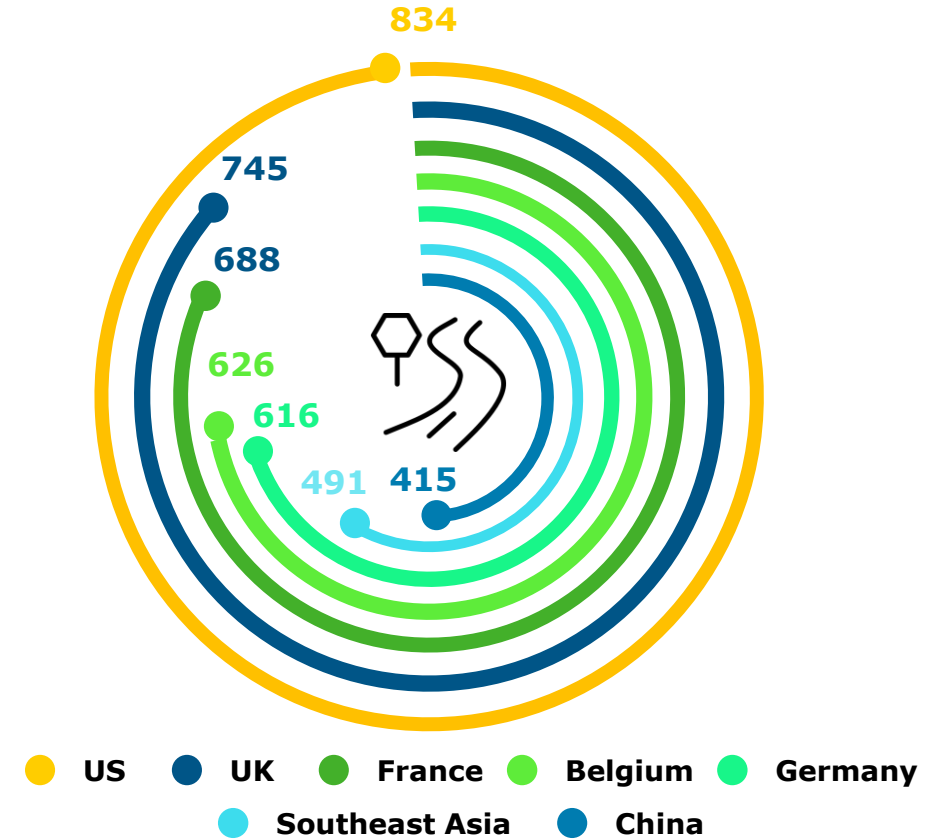
Top 10 concerns regarding all battery-powered electric vehicles



Q31. What is your greatest concern regarding all battery-powered electric vehicles?

Sample size: n= 949

Driving range in KMs consumers expect from a fully charged BEV



Q32. 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: China - n=735; Southeast Asia - n=5,004; Germany - n=1,129; Belgium - n= 872; France - n= 829, UK - n=1,234; US - n=927

EV intenders aren't that much different from ICE intenders in terms of what they are expecting to pay for their next vehicle (i.e., less than €50K)

Price ranges in which consumers prefer to shop for next vehicle

	Overall	Gasoline (Petrol + Diesel)	Electric (HEV+PHEV+BEV)
Less than € 10,000	14%	18%	8%
€10,000 to less than €15,000	17%	21%	12%
€15,000 to less than €30,000	34%	35%	39%
€30,000 to less than €50,000	17%	15%	24%
€50,000 to less than €75,000	4%	4%	6%
€75,000 or more	1%	0%	2%
Don't know/not sure	12%	8%	9%
	82%	89%	83%

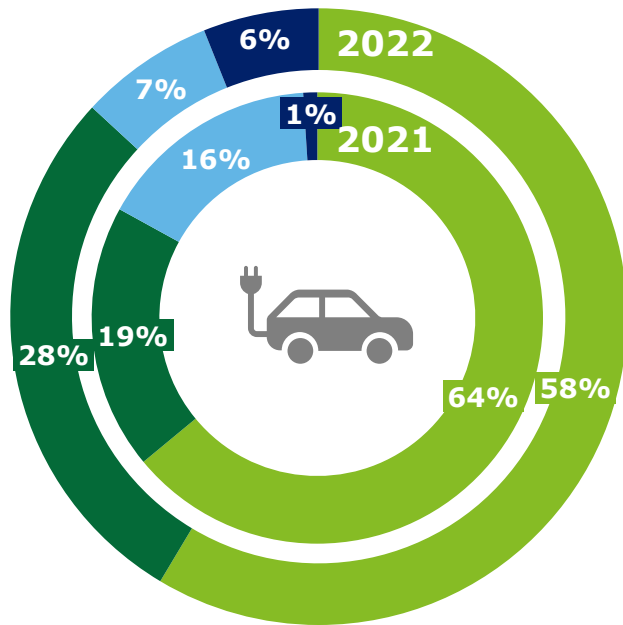
Q21. In which of the following price ranges will you be shopping for your next vehicle? (Please indicate what you would expect to pay after any discounts and/or incentives that might be available).

Sample size: Overall= 949; Gasoline= 395; Electric= 344

Most plan to treat their EVs like their smartphones (charging at home, at night) but that means incurring the cost of charging equipment

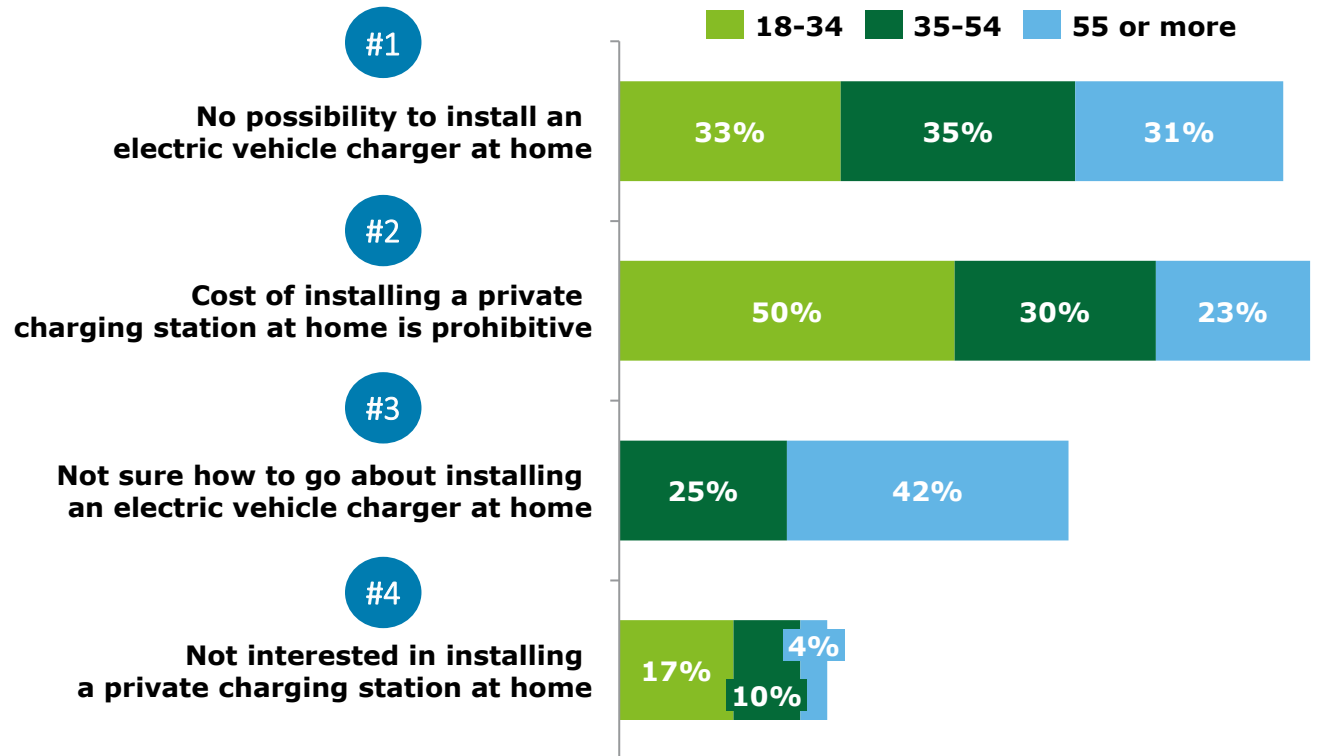
Expecting to charge electrified vehicle most often at...

Top barriers of not charging at home



- Home
- On-street/public charge station
- Work / employer provided
- Other

Q27. Where do you expect to charge your electrified vehicle most often?
Sample size: n= 166

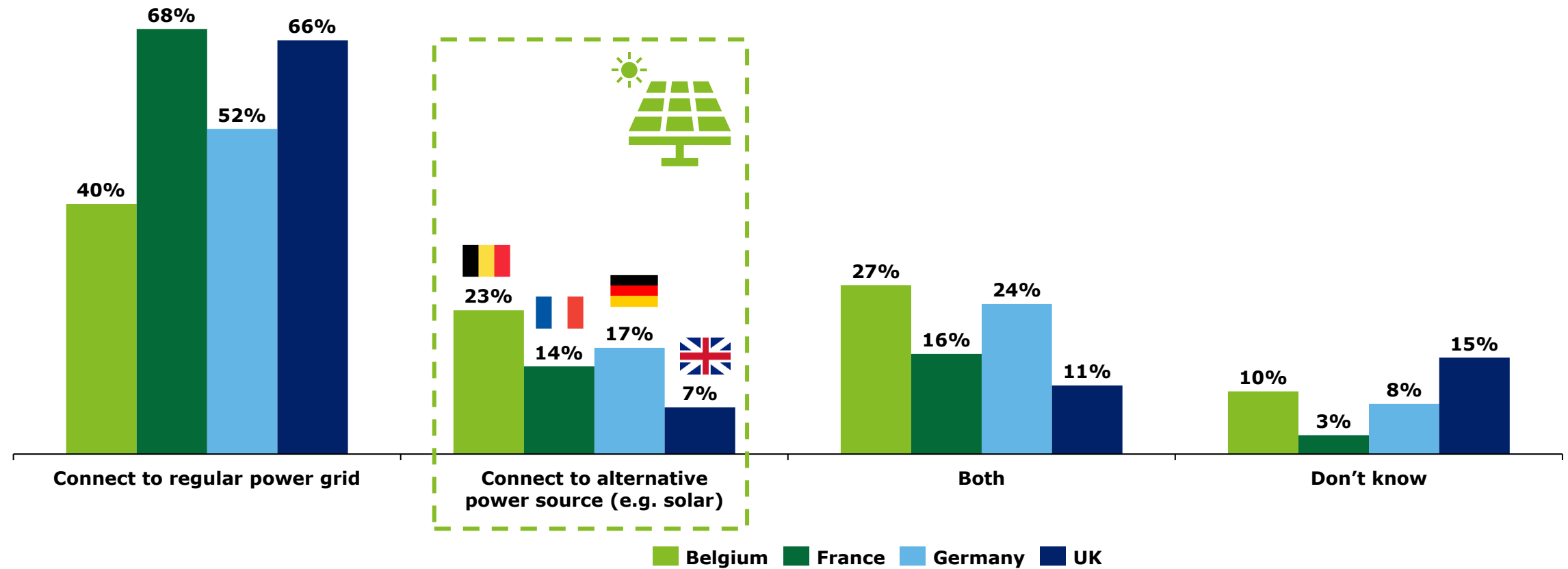


Note: Did not consider "Other" and "Don't know" responses

29. What is the main reason you do not intend to charge your electrified vehicle at home?
Sample size: n= 69

23% of Belgians would prefer to use an alternative power source when charging at home, notably more than many neighboring geographies

Intending to charge electric vehicles at home using...

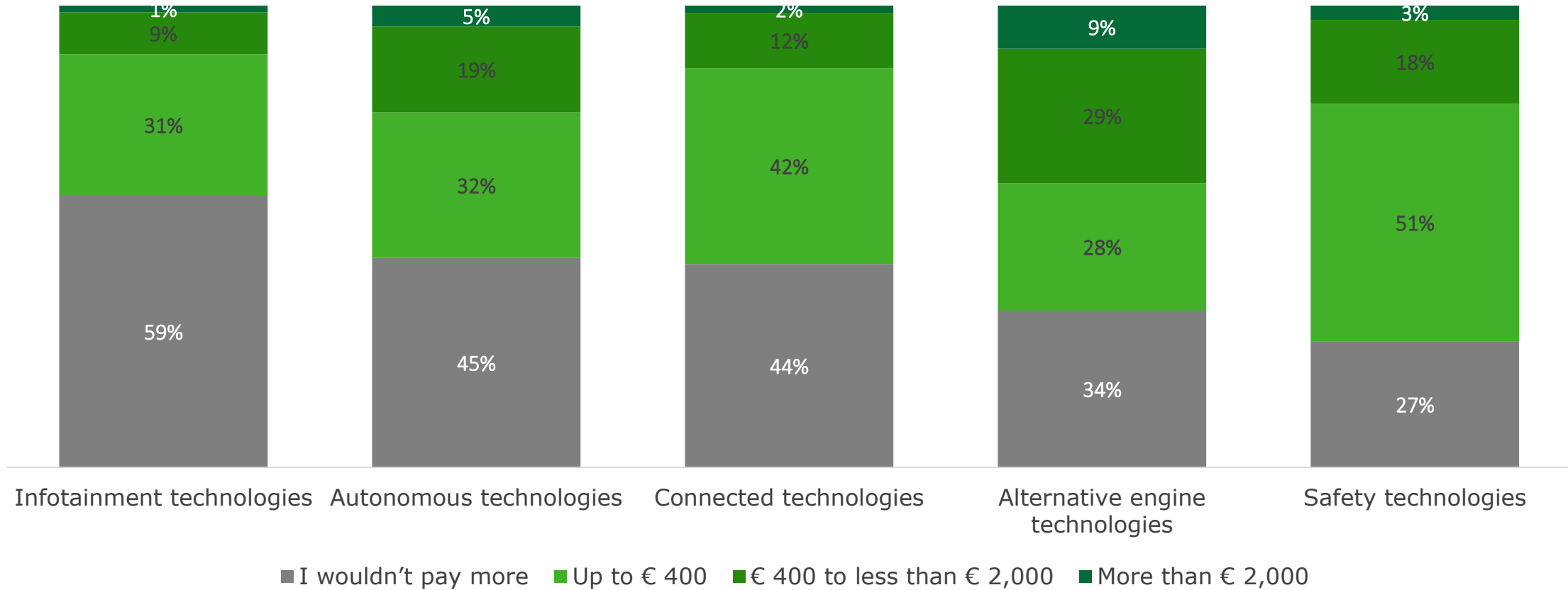


Q28. How do you intend to charge your electrified vehicle at home?

Sample size: n= 97

Consumer willingness to pay for automotive technologies appears somewhat limited in most component categories

Willingness to pay for technologies

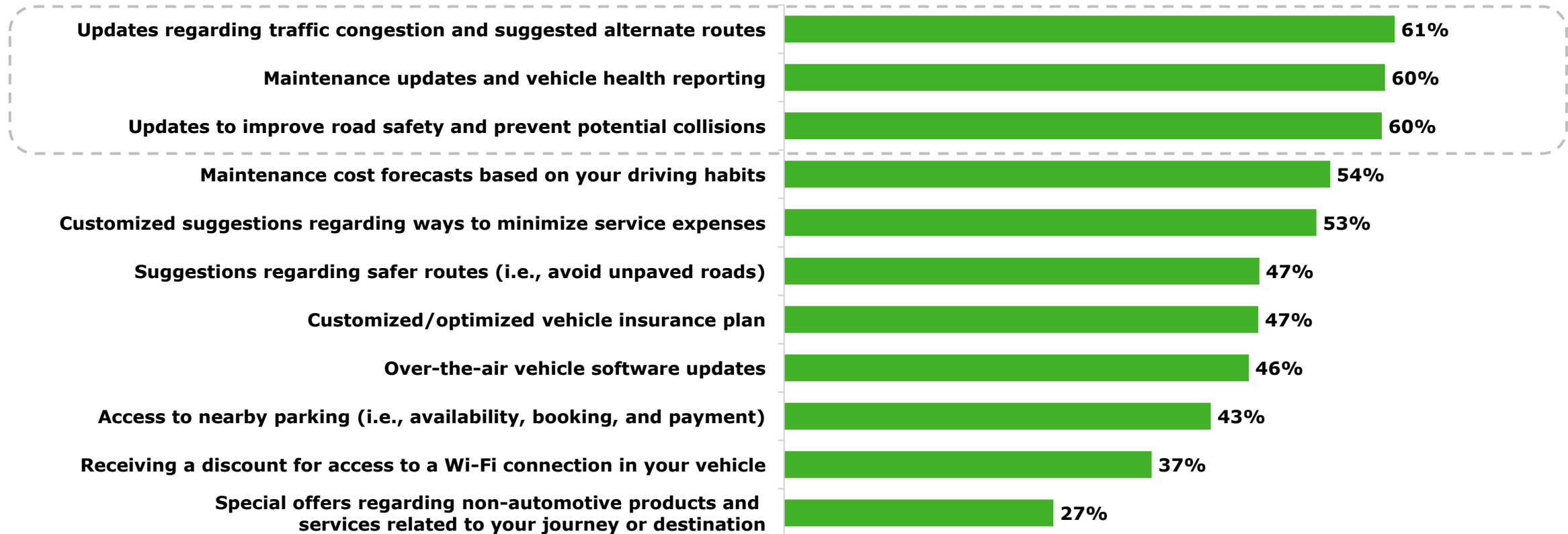


Q3. How much more would you be willing to pay for a vehicle that had each of the technologies listed below?

Sample size: n= 945

6 in 10 consumers are ready to share personal data if it helps in vehicle maintenance, improves road safety, and saves time


Somewhat/very interested in a connected vehicle if it provides benefits related to



Q34. How interested are you in the following benefits of a connected vehicle if it meant sharing your own personal data and vehicle/operational data with the manufacturer or a third party?

Sample size: n=949

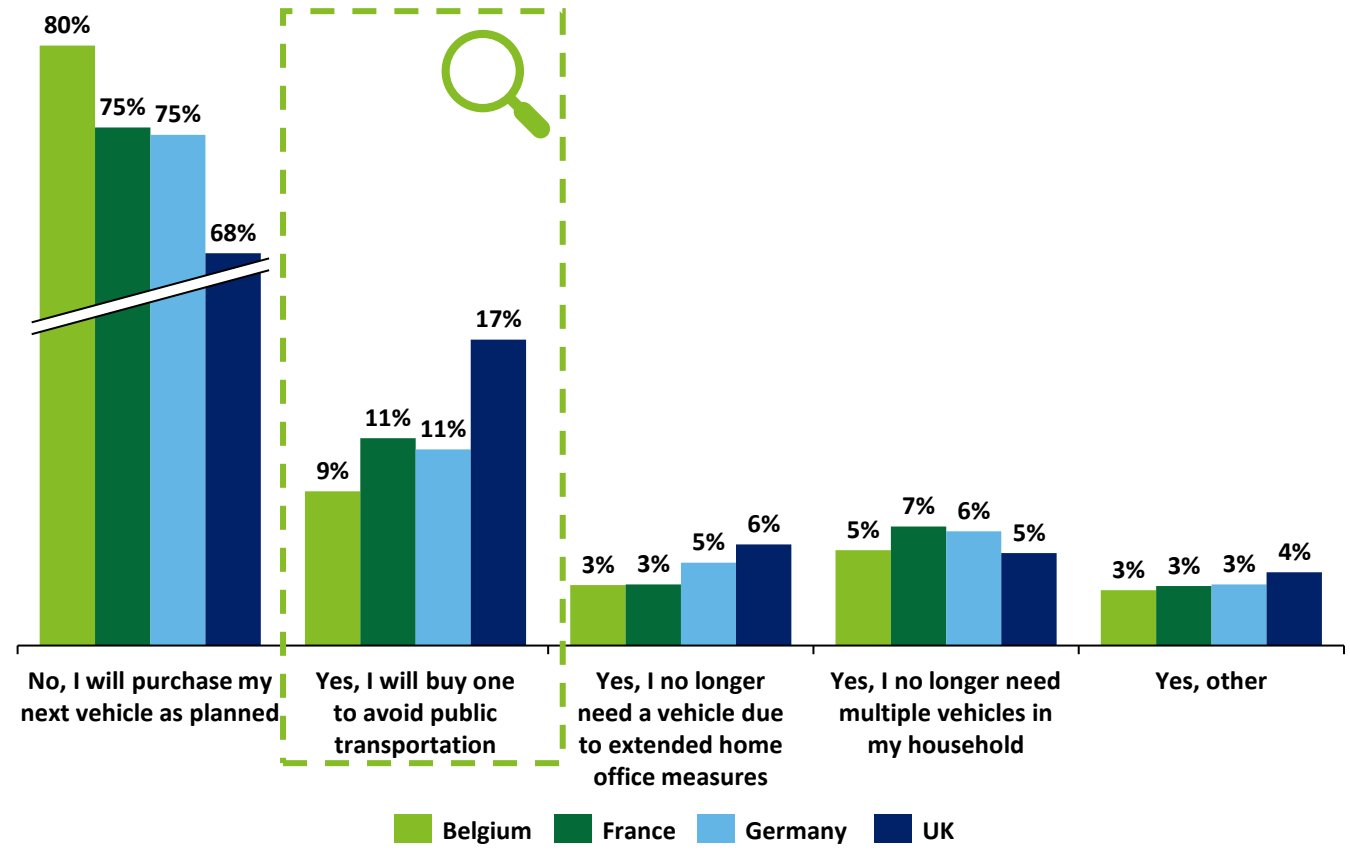
2| What are the purchasing habits of consumers?



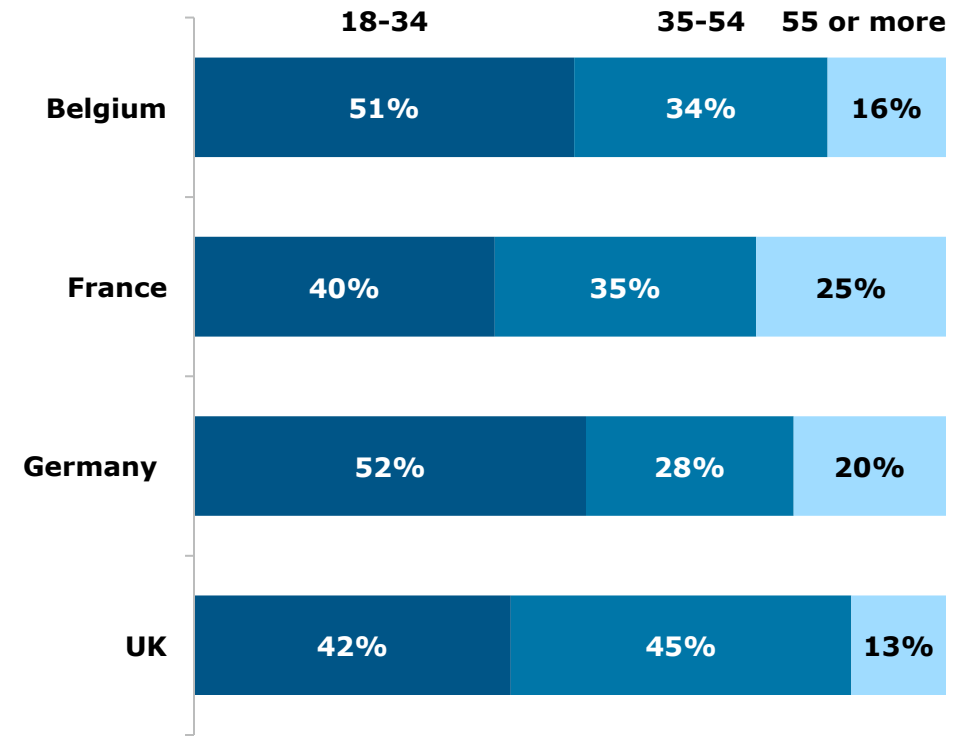
Focus on when, where and how will consumers purchase their next vehicle

Despite the COVID-19 context, eight in 10 consumers plan to purchase their next vehicle as planned

COVID-19 to impact next vehicle purchase



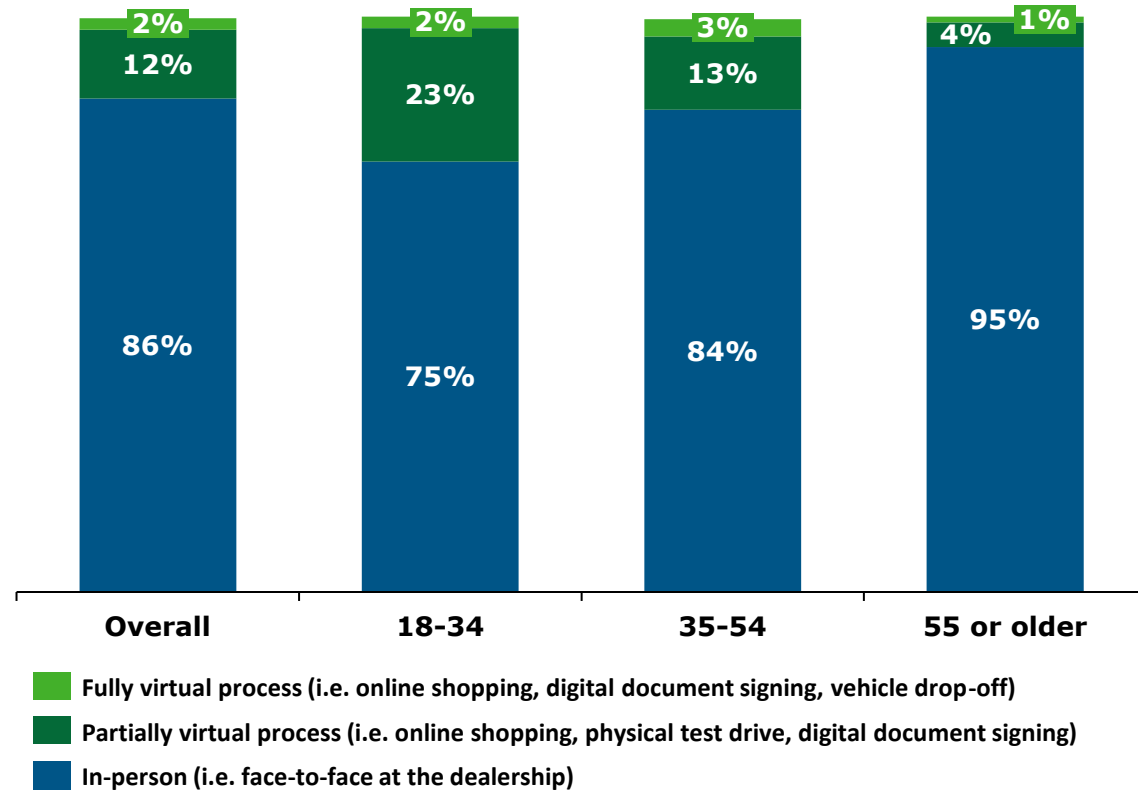
Plan to buy a new vehicle to avoid public transport



Q15. Has the global COVID-19 pandemic had an impact on your decision to purchase your next vehicle?
 Sample size: n= 1,046 [overall]; 264 [18-34], 347 [35-54], 435 [55 and older]

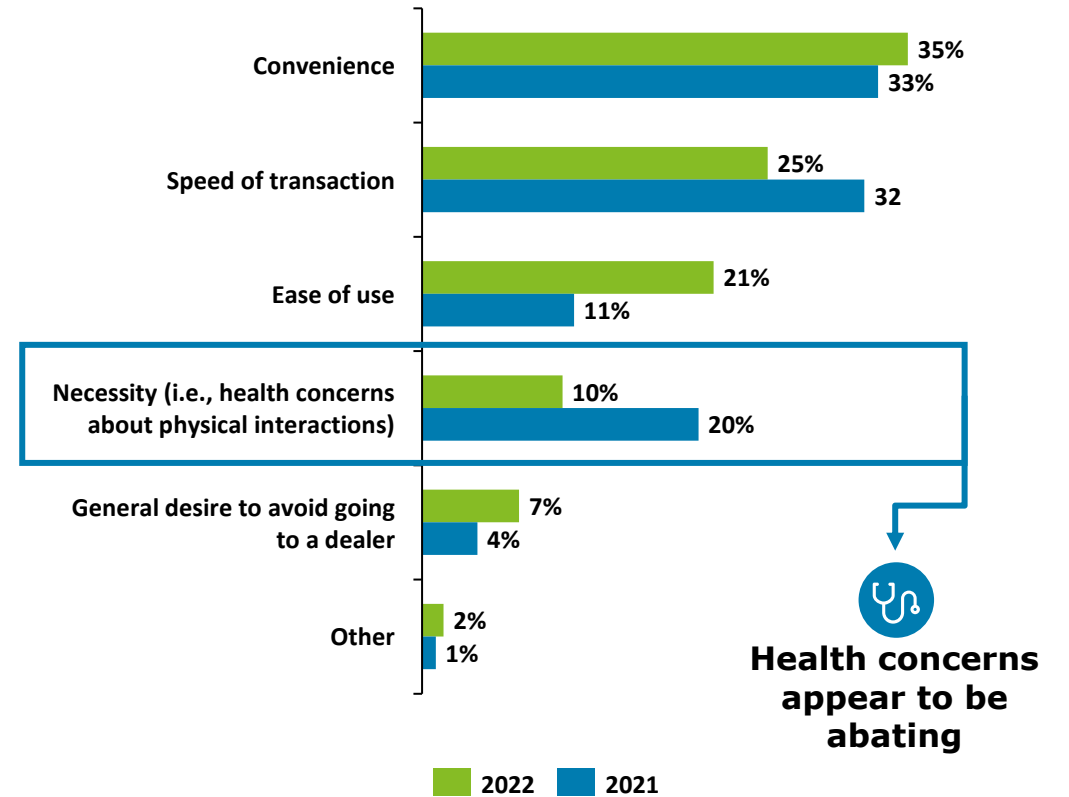
9 in 10 Belgian consumers prefer to acquire their next vehicle physically from a dealer, although there is demand for (partially) virtual sales process

Most preferred way to acquire next vehicle



Note: Did not consider "Don't know" responses
 Q35. How would you most prefer to acquire your next vehicle?
 Sample size: n= 949 [overall]; 242 [18-34], 322 [35-54], 385 [55 and older]

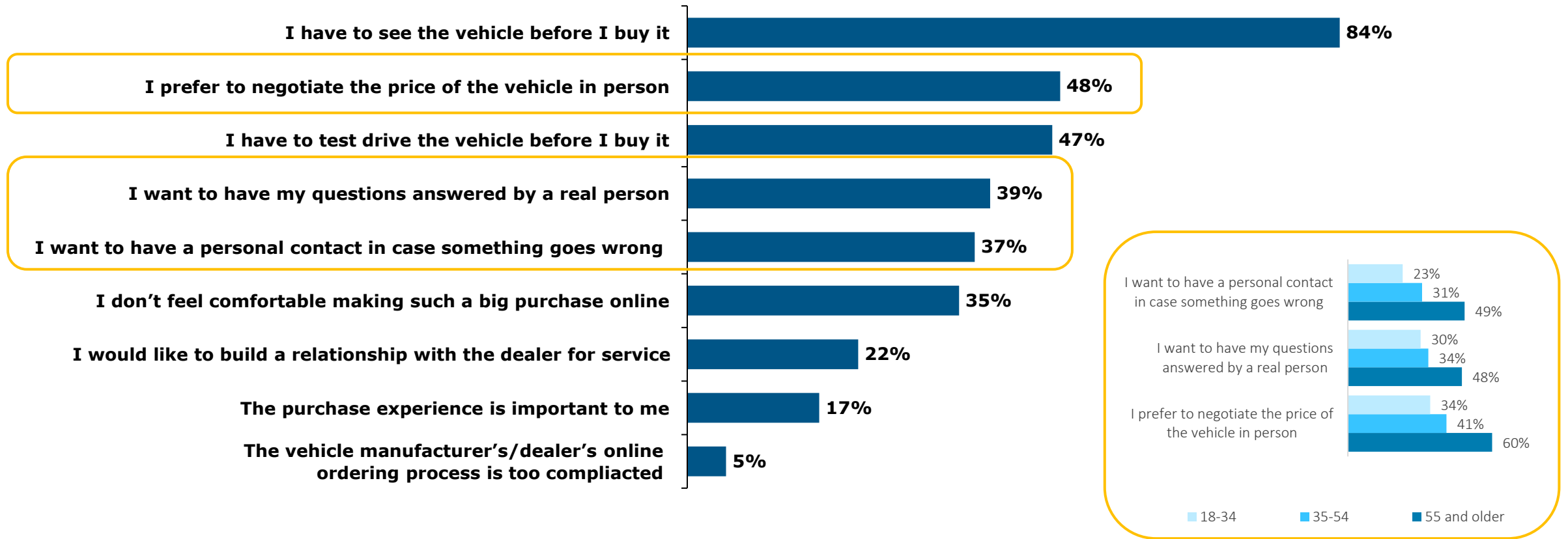
Main reason to acquire next vehicle via a virtual process



Q37. What is the main reason you would prefer to acquire your next vehicle via a virtual process?
 Sample size: n= 128 [2022], 137 [2021]

At the end of the day, some things are simply hard to digitize as people still need to see and drive a vehicle before they buy it

Main reasons for being not interested in acquiring next vehicle via virtual process

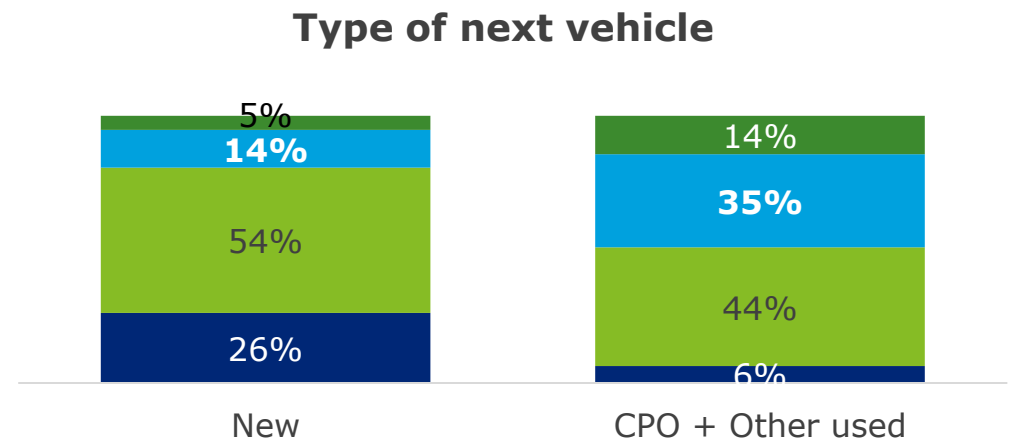
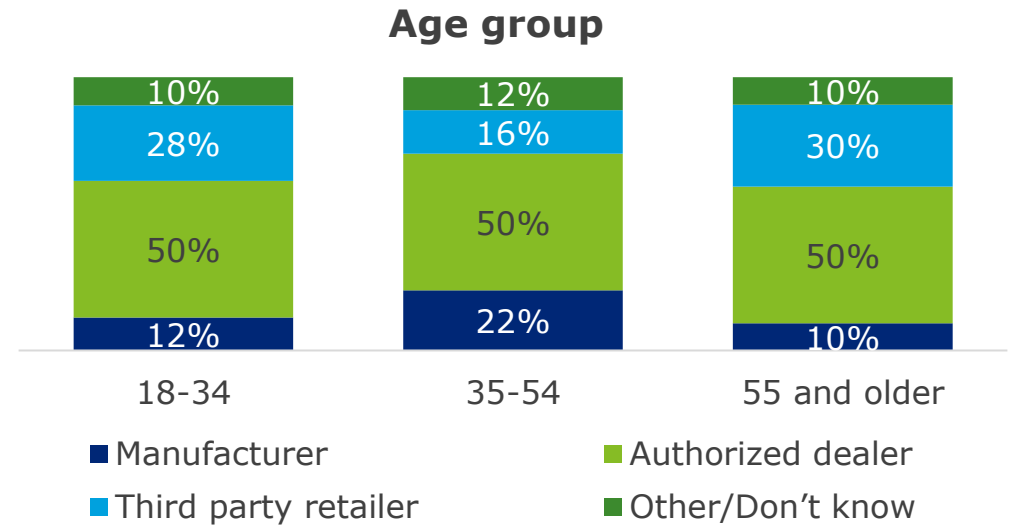
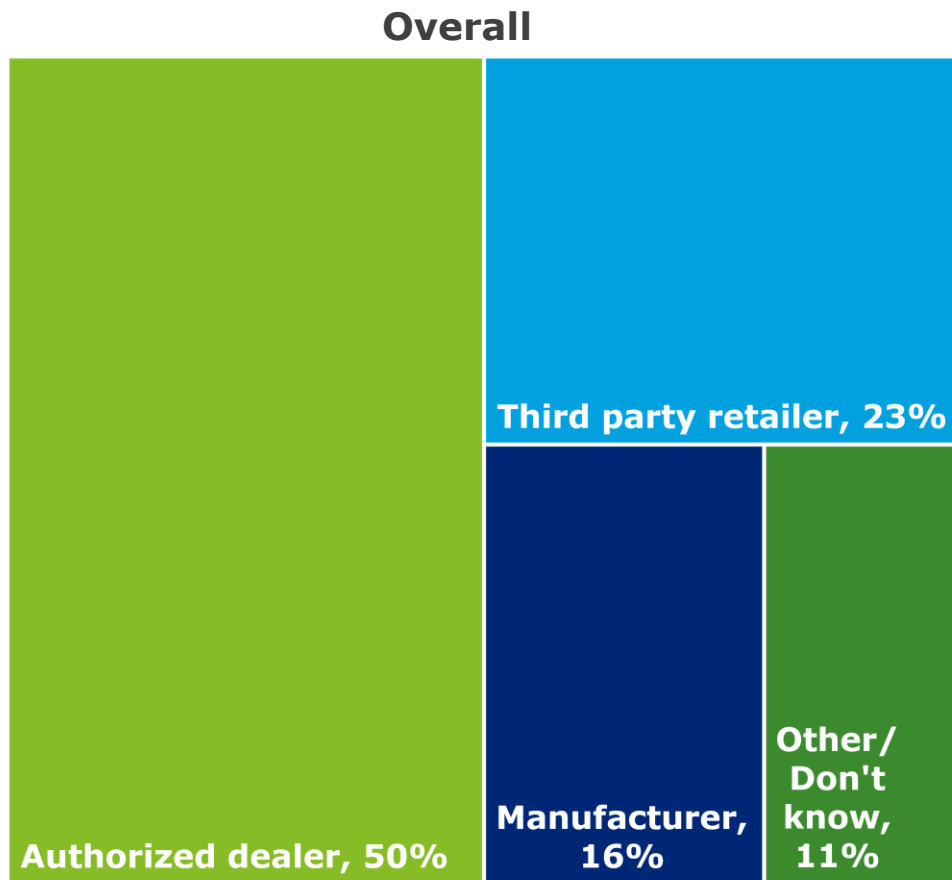


Q38. What are the main reasons you are not interested in acquiring your next vehicle via virtual process? (Select all that apply)

Sample size: n= 794

Even consumers who plan to purchase virtually prefer to buy from dealers; interest in third party retailers is high for used cars

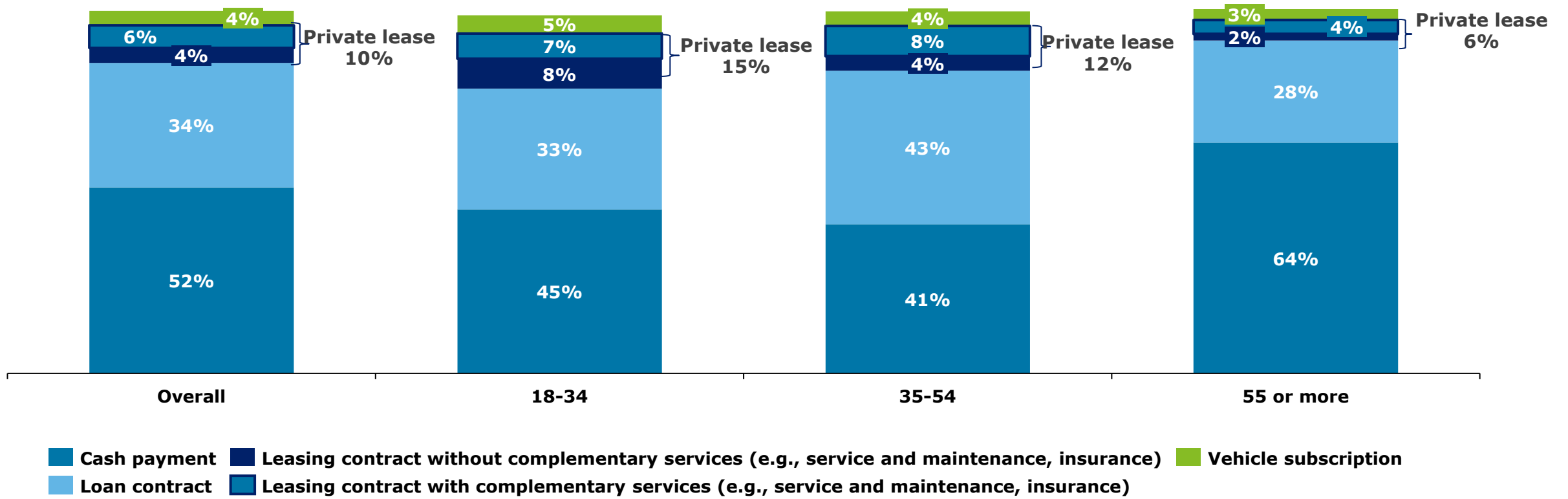
Prefer to acquire next vehicle via a virtual process from



Q36. From whom would you most prefer to acquire your next vehicle via a virtual process?
 Sample size: n= 128 [overall]; 58 [18-34], 50 [35-54], 20 [55 and older]; new [57], CPO/Other used [63]

Nearly half of consumers plan to loan/lease their next vehicle, however cash payments remain popular among the 55+ generation

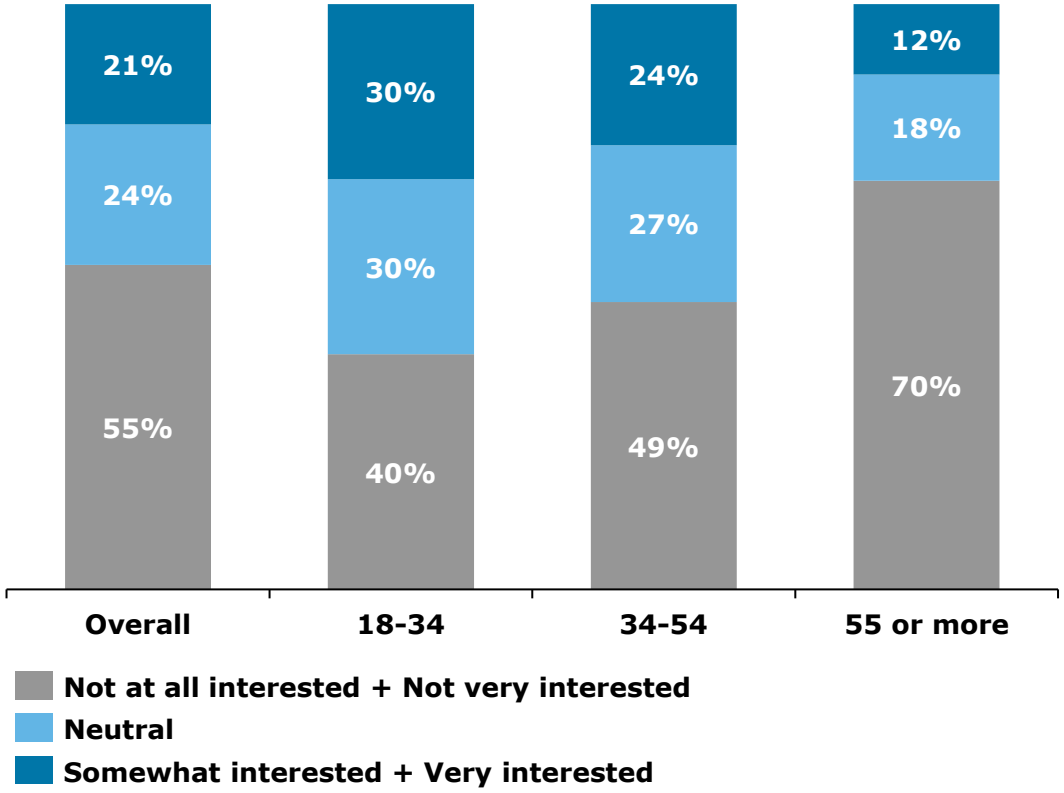
Planning to pay for next vehicle through



Note: "complementary services" include service and maintenance, insurance; * includes mid/long-term rental contract/other
 Q22. How do you plan to pay for your next vehicle?
 Sample size: n= 949

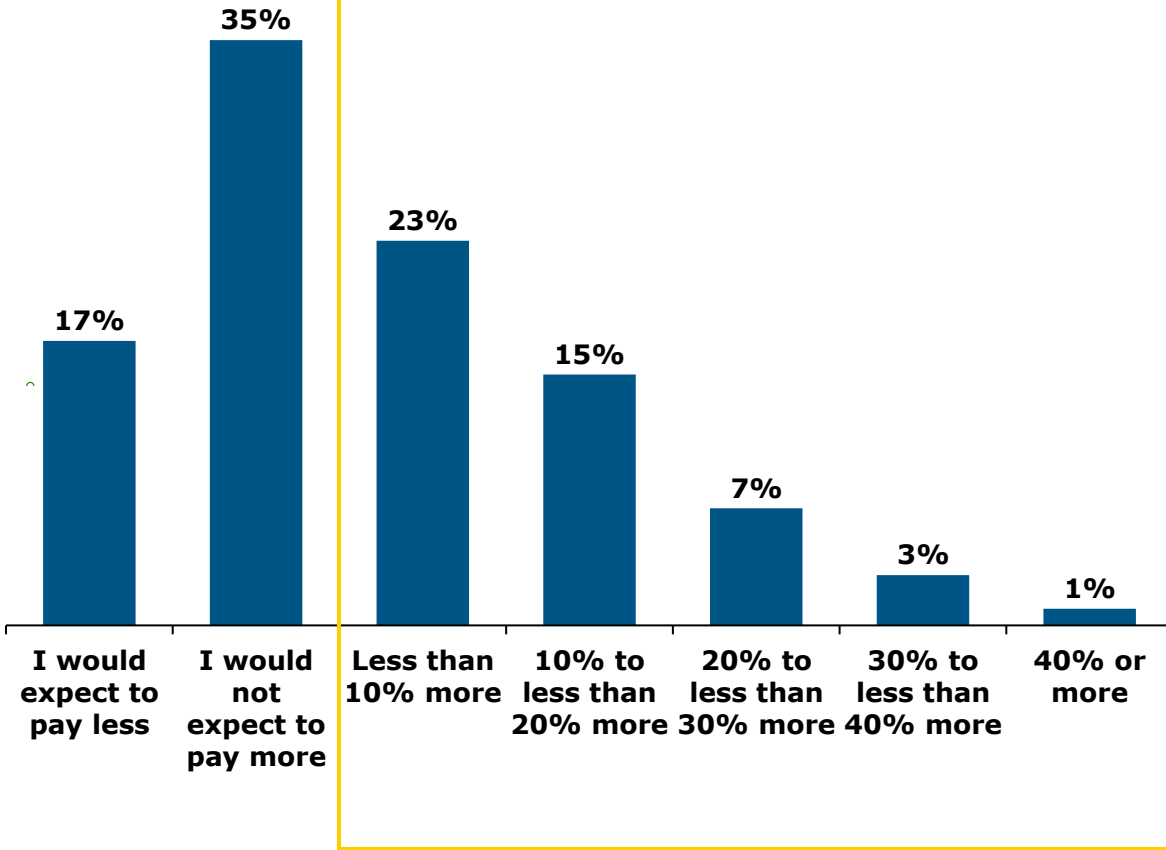
Consumers are interested in vehicle subscription services, but only half are willing to pay more for it

Interest in a subscription service which offers the convenience and flexibility to periodically opt for a different vehicle...



Q45. How interested are you in each of the following scenarios?
 Sample size: n= 1,046 [Overall]; 264 [18-34], 347 [35-54], 435 [55 and older]

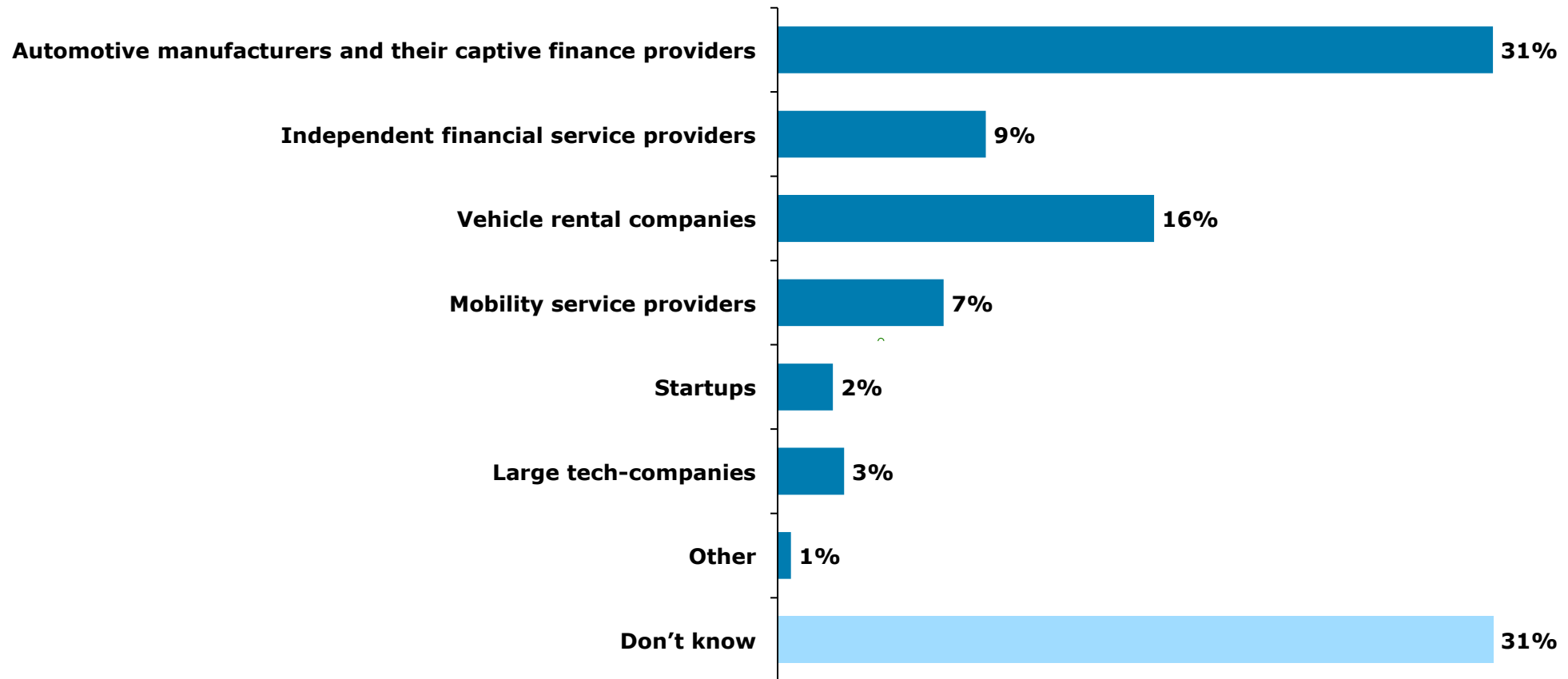
Willingness to pay for such a service



Q46. How much would you be willing to pay for each of the following services as compared to a regular vehicle lease?
 Sample size: n= 466

Though OEMs are the most preferred choice to offer “vehicle-as-a-service” solution, the market is still wide open in terms of consumer trust

Most trusted provider to offer a “vehicle-as-a-service” solution



Q48. Which of the following providers would you most trust to offer a “vehicle-as-a-service” solution (i.e., flexible vehicle usage offering)?

Sample size: n= 1,046

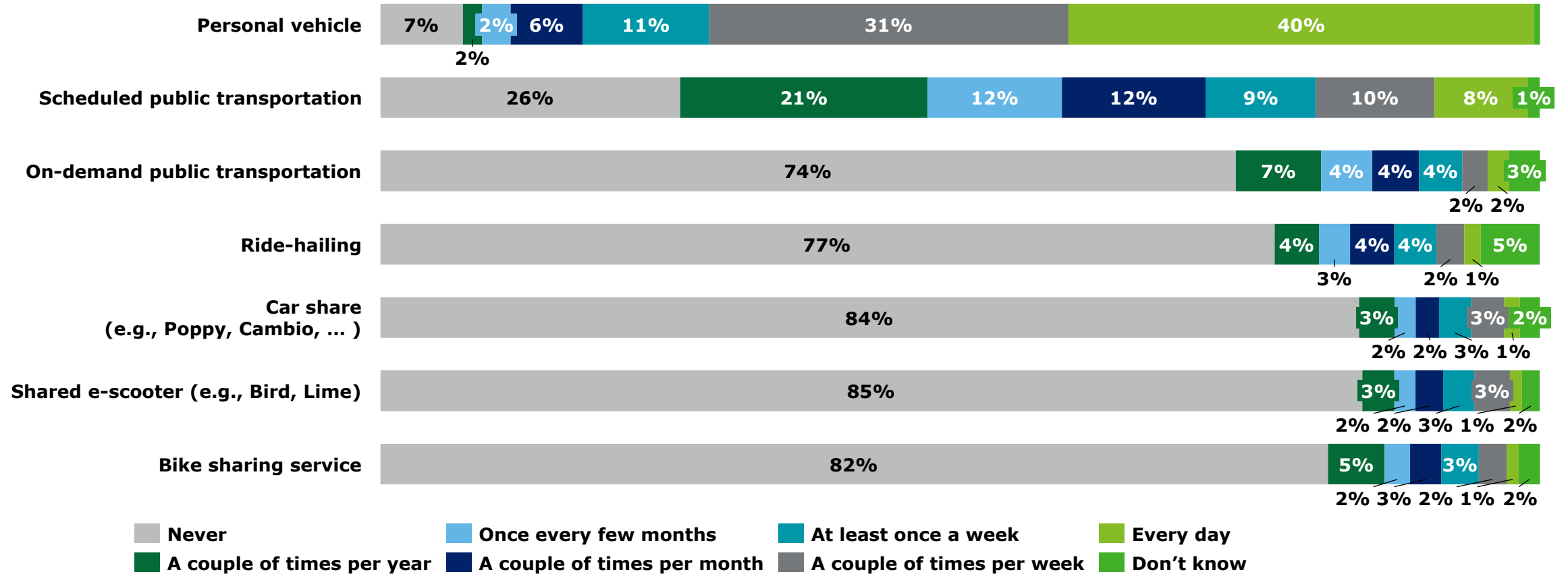
3 | What type of mobility services do consumers prefer?



Focus on mobility apps

'Car is King' – personal vehicles remain the preferred mobility choice, although one in 10 use car sharing on at least a monthly basis

Frequency of usage of different modes of transportation

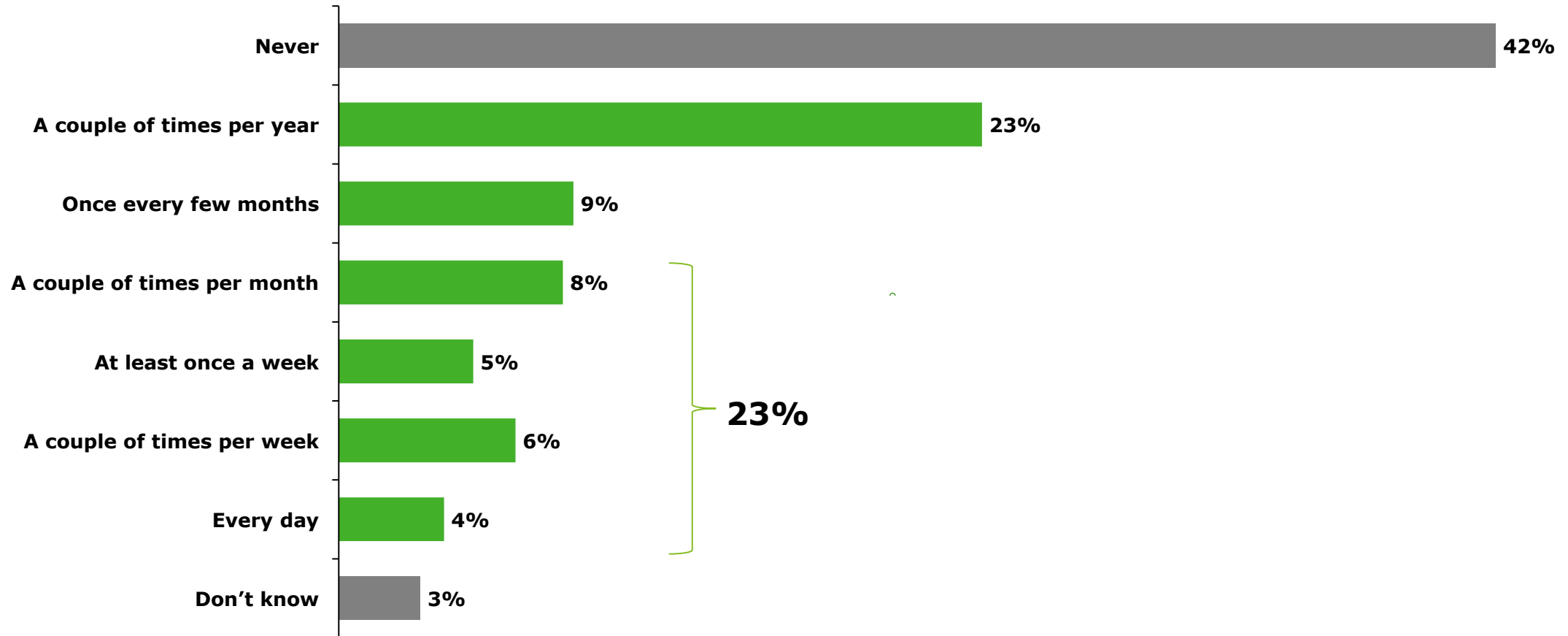


Q42. How frequently do you typically use the following modes of transportation?

Sample size: n=1,046

One in four consumers uses multi-modal transport more than a couple of times a month, although 4 out of 10 never do so

Use of multiple modes of transportation in the same trip

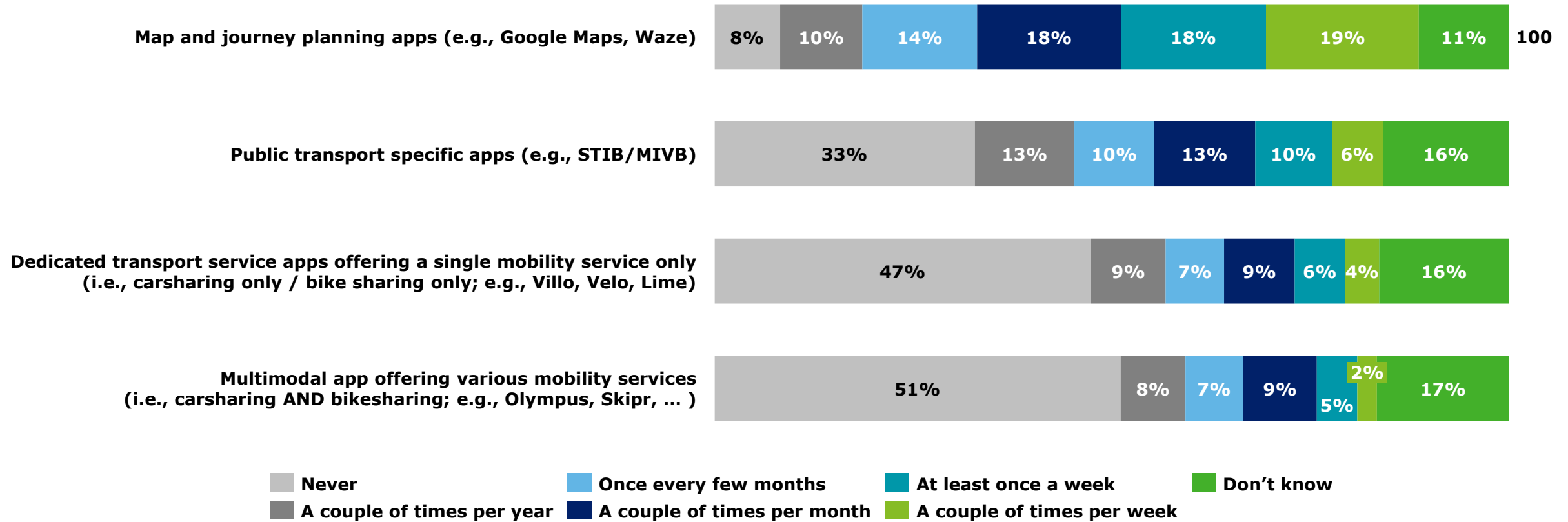


Q43. How often do you use multiple modes of transportation in the same trip (e.g., a trip using a subway, commuter train and your own vehicle)?

Sample size: n= 1,046

Consumers expect to use map and journey planning apps more frequently than other transport-related apps

Types of mobility apps planning to use



Q40. Looking forward, how often do you intend to use the following types of mobility apps?

Sample size: n=1,046

Price and ease of use of the mobility app are significantly more important than the availability of multiple types of mobility offerings

Most important characteristics of a mobility app



Q41. Please rank the following characteristics of a mobility app in order from most to least important.

Sample size: n=1,046

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