

## Press Release

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### Belgian interest in electric vehicles accelerates

**29% of Belgian consumers want their next vehicle to have a hybrid electric engine and 9% opts for an all battery-powered electric vehicle, according to the Deloitte Global Automotive Consumer Study 2020. Belgian consumers remain concerned about connected and autonomous vehicles.**

Brussels, Belgium – 16 January 2020

- In 2020, **29 percent** of Belgian consumers want their next vehicle engine to be hybrid electric, which is up from 23 percent in 2018. **Nine percent** of Belgian consumers would even choose an all battery-powered electric vehicle.
- Wanting a gasoline/diesel engine dropped from 64 percent in 2018 to **52 percent** in 2020.
- **Half** of Belgian consumers (**50 percent**) believe that fully autonomous cars will be **unsafe**.
- Consumers remain resistant to multi-modal mobility. Only a quarter of consumers (**25 percent**) take multi-mode trips on a weekly basis.
- **R&D continues, but consumers lack willingness to pay.** A concerning number of consumers (30 to 49 percent depending on the technology) are unwilling to pay extra for a vehicle with advanced connectivity technologies, even if it improves safety.
- Belgian consumers have **concerns about privacy and data security** in connected vehicles, with consumers most concerned about apps disseminating data (e.g. smartphone apps) and biometrics (e.g. heart rate) being collected.

#### Demand for electrified vehicles accelerates

Traditional diesel/gasoline operated vehicles are starting to give way to hybrid electric vehicles (HEV) and all battery-powered electric vehicles (BEV). In Belgium, interest in diesel/gasoline decreased from 64 percent in 2018 to 52 percent in 2020, while interest in HEV increased from 23 percent in 2018 to 29 percent in 2020 and interest in all BEV rose to 9 percent.

The majority of consumers want more than 320 km of range from a fully charged battery-powered electric vehicle (BEV). However, younger people are more comfortable with a lower driving range compared to older generations. Consumers are ready to wait maximum one hour to fully recharge their BEV. Only 14 percent of consumers expect to charge a battery within 10 minutes.

Thirty-eight percent of consumers who intend to purchase an electrified vehicle identified lower emissions and operating costs as the main reasons for consideration. Driving range and lack of charging infrastructure remain the top concerns.

## **Interest in autonomous vehicles decreased in most countries**

Consumer perception regarding the safety of self-driving vehicles remains stalled since last year, and a couple of countries are reversing course. In India, the percentage of consumers who agree that autonomous vehicles will not be safe has risen from 47 percent in 2018 to 58 percent in 2020, and in China this percentage rose from 26 percent in 2018 to 35 percent in 2020. In Belgium, 50 percent of consumers believe that fully self-driving cars will not be safe in comparison to 43% in 2019. There is also a growing desire for government oversight of AV technology (57 percent in 2020 in comparison to 42 percent in 2017) and also brand trust remains very important.

Consumer trust is now almost evenly split between traditional car manufacturers, traditional tech companies, and new autonomous vehicle (AV) specialists suggesting no one has been able to build a compelling proposition yet.

**Eric Desomer, Deloitte Belgium Automotive Leader:** "Technologies in the alternative powertrain domain appear to be advancing to a point where they have offset some of the concerns we have seen over the past decade. However, to encourage the consumer uptake of advanced vehicle technologies, the automotive ecosystem still has some work to do in terms of making EVs as easy and convenient as internal combustion engines, lowering the cost of EVs, and figuring out just who will build and pay for the charging infrastructure. Despite Belgians being increasingly receptive to electric vehicles, their concerns about connected and autonomous vehicles will require the Belgian automotive ecosystem to put in more effort to encourage a significant uptake of advanced vehicle technologies. Taking into account the concerns of consumers when determining long-term investments can be the difference between success and failure."

## **New mobility models: Consumers remain resistant to multi-modal mobility**

More access to mass transit is perceived as the best option to solve congestion. However, at the same time, the idea of combining different modes of transportation into a single trip remains largely an occasional behaviour. Only a quarter of consumers (25 percent) take multi-mode trips on a weekly basis while 50 percent rarely use multiple modes of transportation.

## **Vehicle connectivity, privacy and data security concerns remain**

When it comes to the advantages of increased connectivity in vehicles, consumers are split on whether it is worth it. Nearly half of Belgian consumers are concerned about apps disseminating data and biometrics (e.g. heart rate) being collected in connected vehicles. They are more inclined to share sensor data on the mechanical status of the vehicle.

Although original equipment manufacturers (OEMs) appear to have a distinct advantage when it comes to engendering trust, 20 percent of consumers do not want anyone managing the data created by their vehicle. The majority of Belgian consumers are willing to pay no more than €1,200 for connectivity. A concerning number of consumers (30 to 49 percent depending on the connected technology) are unwilling to pay extra for a vehicle with advanced connectivity technologies, even if it improves safety.

## **R&D continues, consumers lack willingness to pay**

Original equipment manufacturers continue to spend billions on R&D in advanced vehicle features with the assumption that consumers will pay a premium to gain access to these advanced technologies when they appear on the market. However, Deloitte's 2020 Global Automotive Consumer Study reinforces the past findings that achieving a return on invested capital for new technologies may be more difficult than some automakers think. A concerning number of consumers (30 to 49 percent depending on the technology) are unwilling to pay extra for a vehicle with advanced connectivity technologies, even if it improves safety. For those willing to pay extra, it does not cover the costs required to develop and deliver the technology.

**Eric Desomer:** "Stakeholders across the automotive industry are currently facing challenges when it comes to business models and product portfolios as they are forced to rethink long-term investments while not getting left behind. Underlying these massive R&D investments is the assumption that consumers will actually pay for advanced vehicle technologies when they appear on the market. However, as consumer scepticism gains momentum and their desire to purchase new technologies continues to wane, automakers should rationalise returns on invested capital to remain profitable and shift gears to the realities of electrified vehicles."

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#### About the report

From September through October 2019, Deloitte surveyed more than 35,000 consumers in 20 countries, including 1,286 Belgians, to explore opinions regarding a variety of critical issues impacting the automotive sector, including the development of advanced technologies.

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