Polaris Study 2024

September 2024

D'Ieteren

Our Polaris Survey

Towards new challenges for the mobility of tomorrow

**D'Ieteren's ambition is to be the natural choice in Belgium for mobility.
To achieve that, D'Ieteren develops a growing range of mobility products & services that go beyond its core of selling and distributing cars.**

In light of changing customer and market trends, Project Polaris was launched in 2021 to review and reassure D'Ieteren's future-proofness.
With a first repeat survey in 2023, this is already the third follow-up measurement.
Moreover, this survey also takes a closer look at the electrification of the car fleet and the openness to new forms of mobility.

This study has been done in collaboration with Profacts.

Table of contents

Chapter 1

Overall conclusions

Overall conclusion Polaris 2024 – **Belgian population**

The big change in the mobility landscape has not yet taken place. We are leaning close to last year's results.

1

MOBILITY INTENTIONS ARE SIMILAR TO PAST YEAR, INCLUDING LITTLE INTENTION TO CHANGE.

Almost all results about mobility behavior are in line with those of past years, guiding us into the same conclusions.

The car has a central role in the mobility solutions of Belgians. We **don't notice a further increase** for **electric bikes**, neither in Flanders (where this was already higher), nor in Wallonia, where the use of bikes lacks behind. In terms of distance & frequency; we barely see people that are planning to change their travel habits in the (near) future.

The **intention to use shared mobility remains rather low**. At this moment, 18% of Belgians have already used shared mobility. Adoption rate is higher in the urban regions & among younger aged people.

2

THE WAY BELGIANS LOOK AT THEIR CAR HAS NOT CHANGED EITHER.

First of all: the constitution of cars within household has barely changed.

- 88% of Belgians households has a car. 32% have 2 cars or more available.
- 14% of families with a car have at least a company car. In 2 out of 3 situations, accompanied by at least one other car.

This confirms last years insight that there is little interest to abandon the car. And this year too, there seems to be little interest to do so. Even in a mobility package of the employer, the interest to have a car anyway remains high (84%).

Overall conclusion Polaris 2024 – **Belgian population**

The big change in the mobility landscape has not yet taken place. We are leaning close to last year's results.

3

INTEREST IN ELECTRIC CARS HAS NOT FURTHER INCREASED

With 39% intending to consider an electric car as their next purchase, the interest in buying an electric car has not further increased, while the interest in thermic cars remains intact. Belgians also expect other institutions than car dealers or insurance companies less to provide us with information.

The conclusions of Polaris 2023 remain relevant: the perception that electric car lacks convenience & the cost (although the offer is larger & there are more basic models on the market), is still too high.

In addition, we also see that the need for private charging facilities is crucial. The majority of those without a driveway or garage see this as a barrier to not going for an electric car. Sufficient public charging stations are nevertheless going to be able to convince this group.

4

ADOPTION OF OTHER MOBILITY SOLUTIONS CONTINUES (AND LIKELY WILL CONTINUE) TO BE PRIMARILY DRIVEN BY THE YOUNGER GENERATION.

- Belgium is not yet ready for self driving taxis.
- About half of the companies is offering a bicycle leasing option, but only 7% of employee is using it. 19% is considering to start using it though.
- 36% of bike owners are willing to pay for secure bike parking.
- 73% would be ready to install an Energy Management System to reduce their energy bill
- Less people (57%) are open for a dynamic energy tariff (which implies an uncertain price).

D'Ieteren

Overall conclusion Polaris 2024 - **fleet/mobility managers**

1

FULLY ELECTRIC CARS HAVE RAISED THEIR SHARE WITHIN CAR FLEETS, BUT THERMIC CAR WILL STILL BE PART OF THE FLEETS IN THE FORESEEABLE PERIOD OF TIME:

The number of fully-electric company cars raised strongly compared to a year ago (from 10 tot 17%), with Flanders taking the lead (from 12 to 20%). The number of Hybrid cars remained stable.

Mobility offerings among companies remained quite stable.

Tax attractive remuneration is still the number one driver for their mobility offers but is slightly less important compared to one year ago.

2

FLEXIBILITY FOR EMPLOYEES ON THE RADAR OF COMPANIES

Although fleetmanagers don't expect much change in the mobility behaviour of employees, they think more often that there is a wish to use other mobility alternatives next to their cars.

In line with this insight: more than 80% have a positive attitude towards a mobility budget.

Slightly more than 1 out of 3 companies does offer bike leasing.

Awareness among fleet managers about the CO2 tax or CO2 impact of the company due to their mobility policy has not grown.

Customer Insights
(incl. fleet driver)

D'Ieteren

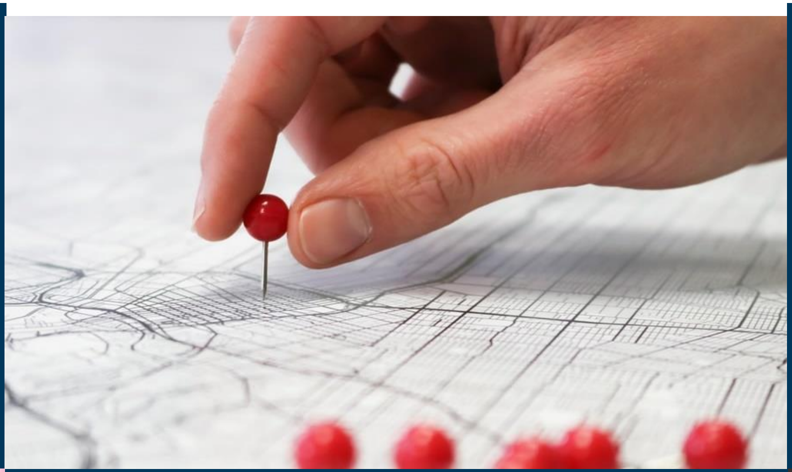
Sample description

Socio-demographic profiling

Gender

49%

51%



Age

< 35 y.o.	35 - 54 y.o.	55 - 64 y.o.	65 y.o.
26	33	17	25

Region

11% Brussels

58% Flanders

31% Wallonia

Where possible, this study also charts comparisons to previous research.

⚠ *Past waves, we only considered people with a driver license or the intention to get one, since we focused on car habits & evolution. With the changing mobility environment, we now also investigate those that don't have a driver license, and don't have the intention to get one either.*

Base: Total sample (n=1004). **Weighted sample*

Mobility behavior

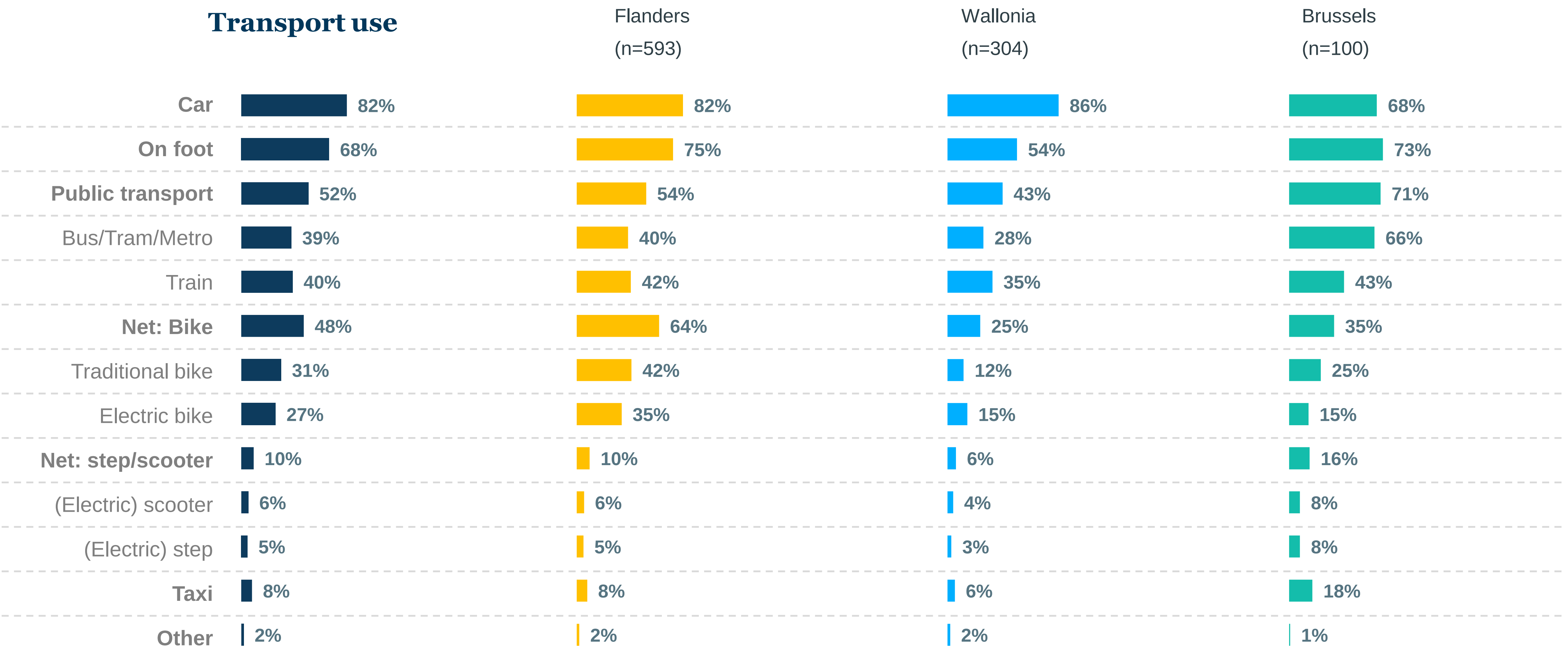
Mobility behaviour

Mobility intentions are similar to past year, including little intention to change.

Almost all results about mobility behavior are in line with those of past years, guiding us into the same conclusions.
The car has a central role in the mobility solutions of Belgians. We don't notice a further increase for electric bikes, neither in Flanders (where this was already higher), nor in Wallonia, where the use of bikes lacks behind. In terms of distance & frequency; we barely see people that are planning to change their travel habits in the (near) future.

The **intention to use shared mobility remains rather low**. At this moment, 18% of Belgians have already used shared mobility. Adoption rate is higher in the urban regions & among younger aged people.

The car remains very dominant in the mobility landscape, although there are very strong regional differences. Cycling scores very strongly in Flanders. Public transport lags behind in Wallonia. There are no differences as compared to past year.

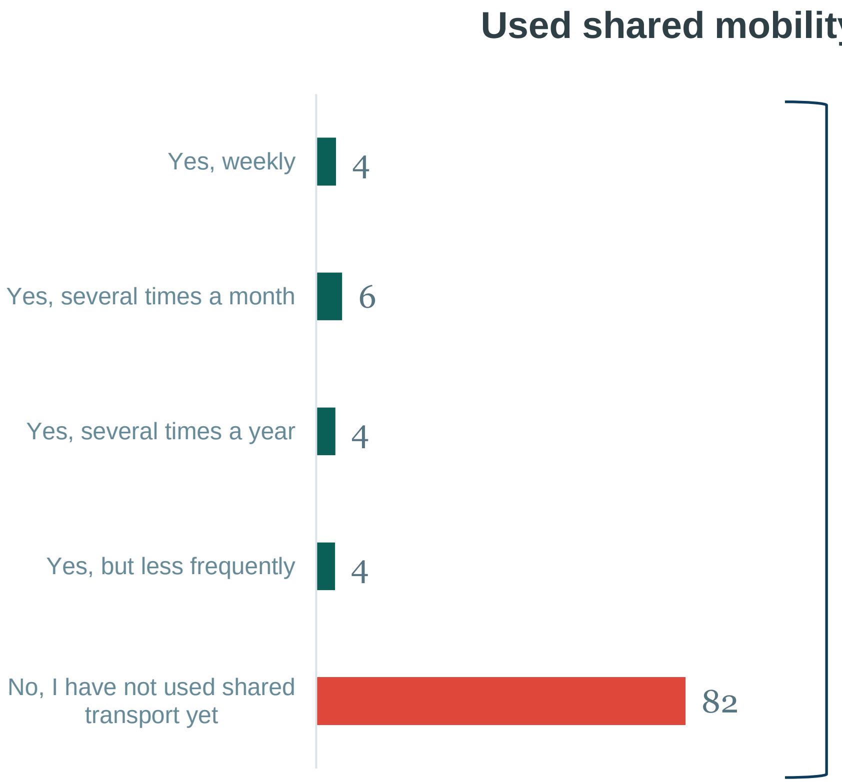


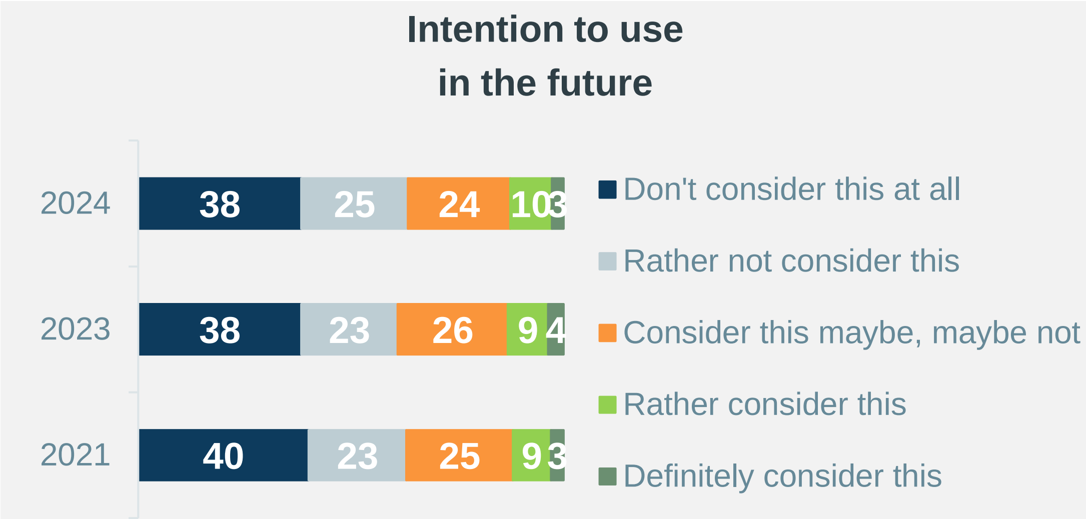
Base: Total net sample (n=1004)

Question: Q2.1 Which of the following modes of transportation do you plan to use in the near future?

Eight out of ten Belgians reported never having used shared transport in Belgium. The use rate of shared transport is higher in the urban areas.
The intention to use shared mobility vehicles remains stable compared with past year.

Shared mobility use & consideration in the future



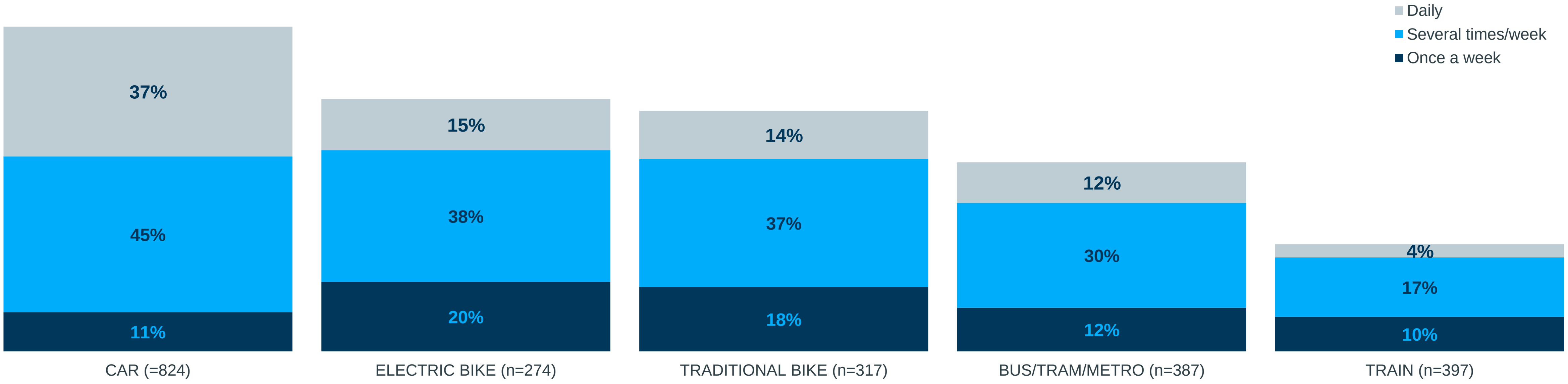


Base: Total sample (n=1004)
Question: Q2.5a. Have you ever used shared transport in Belgium? How often? Share transport allows passengers to travel in vehicles (cars, bikes, scooters) that are shared with all users of the service that provides these vehicles. For example, Cambio, Poppy, Lime, Vélo, Villo!, Jump (source: Profacts omnibus July 2024 (part2))
Q2.5b To what extent do you consider to use shared mobility in the future?

D'Ieteren

Just like past year, the car takes a prominent role in the mobility landscape, with 93% of car users taking the car on a weekly basis.
72% of electric bike users, do so on a weekly basis.

Transport use – frequency



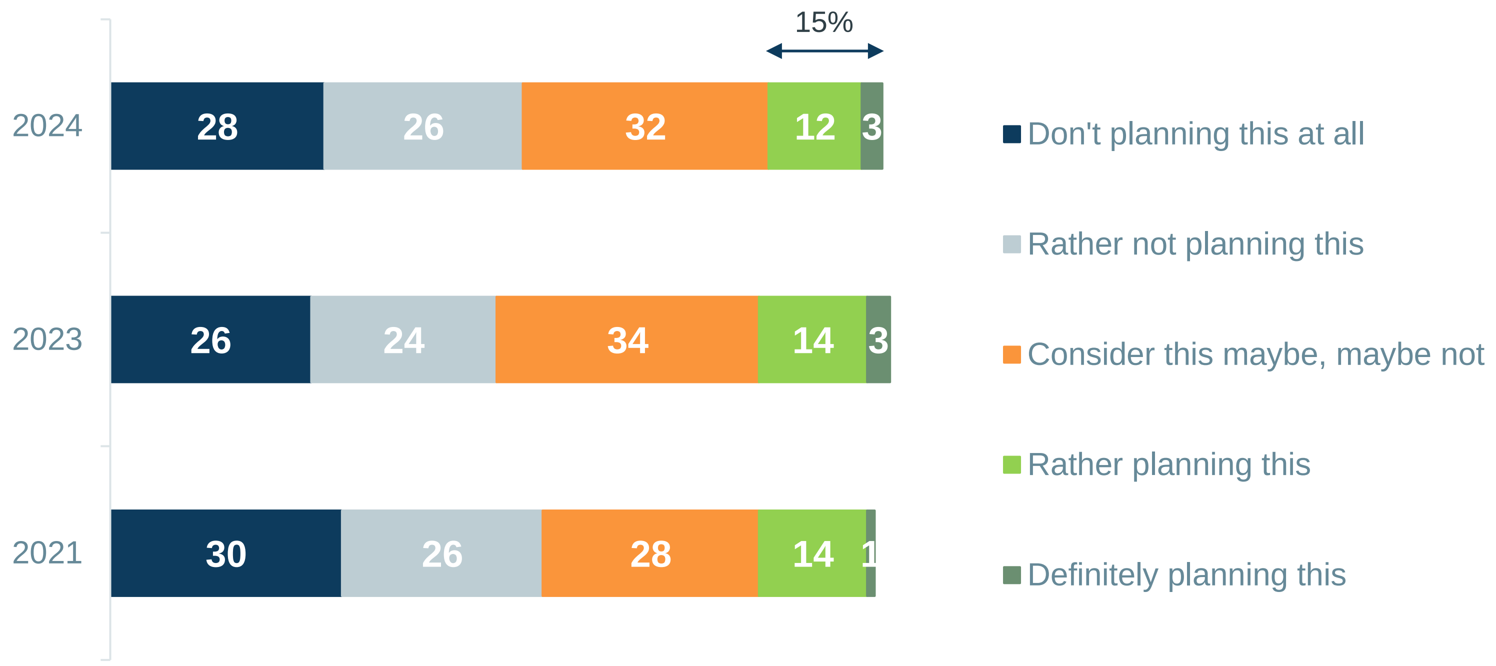
In line with the use – the same difference in frequency does pop-up.
Public transport is more often used in Brussels & Wallonia, while bikes are more frequently used in Flanders.

D'Ieteren

Base: Users of that transport method
Question: Q2.2 How many times per month will you use each of the following modes of transportation in the near future?

Only 15% plans to change their behaviour in the next couple of years.

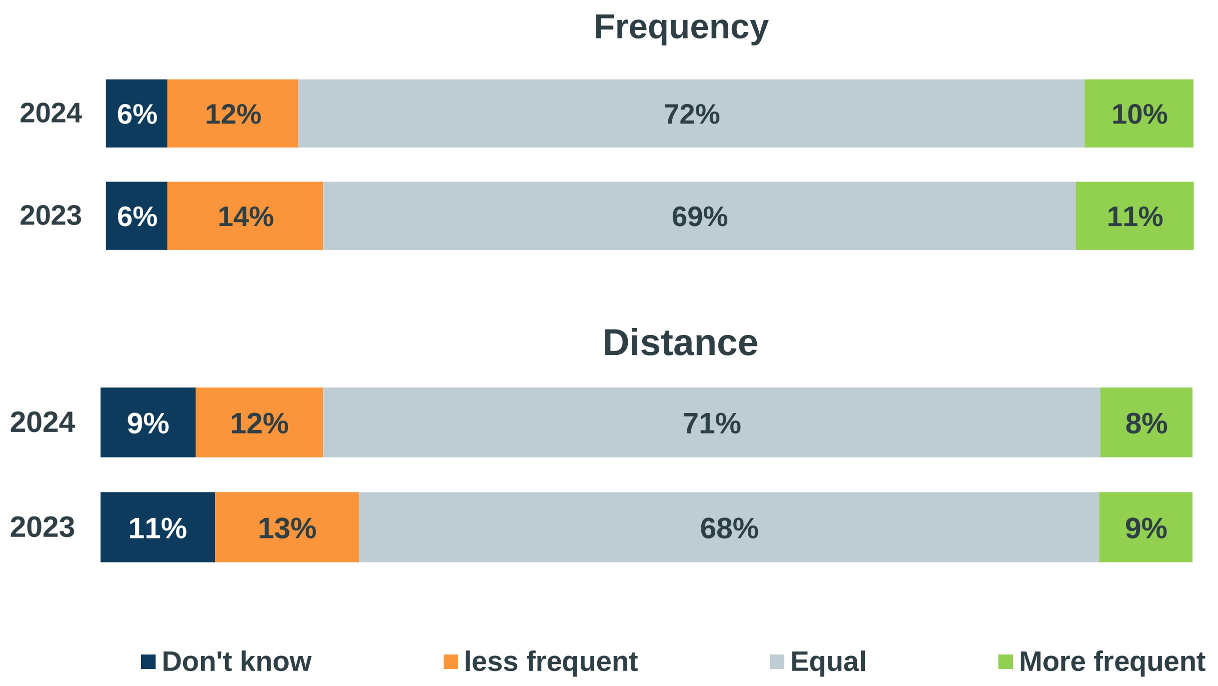
Intention to change their behaviour



Base: Total sample (n=1004) | Plans to change their behaviour (n=148)
Question: Q2.14a To what extent do you plan to change the way you move in the next couple of years?

In line with the intentions, the majority of Belgians will keep their travels similar in the future, both in frequency as in distance.

Travel evolution estimation



The same age effect is true compared to last year: younger people tend to increase their mobility needs (more & further), while older people, especially 65+y.o, tend to decrease their travel attitude

Base: Total sample (n=1004)
Question: Q2.3b How do you estimate the evolution of your travel for the future?

Relationship between Belgians and their cars

Relationship between Belgians and their cars

The way Belgians look at their car has not changed either.

First of all: the constitution of cars within household has barely changed.

- 88% of Belgians households has a car. 32% have 2 cars or more available.
- 14% of families with a car have at least a company car. In 2 out of 3 situations, accompanied by at least one other car.

This confirms last year's insight that there is little interest to abandon the car. And this year too, there seems to be little interest to do so. Even in a mobility package of the employer, the interest to have a car anyway remains high (84%).

The car remain the king…

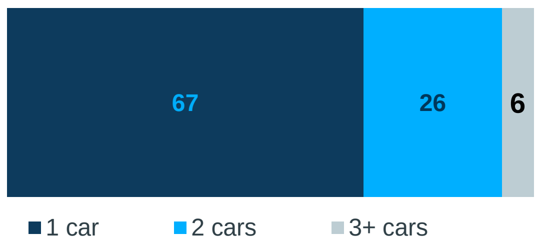
But there is a slight decrease in the number cars by family

88% of respondents have at least 1 car

in their household while 32% own 2 or more cars

There is a decrease of 5 pt. on the people owning more than 3 cars

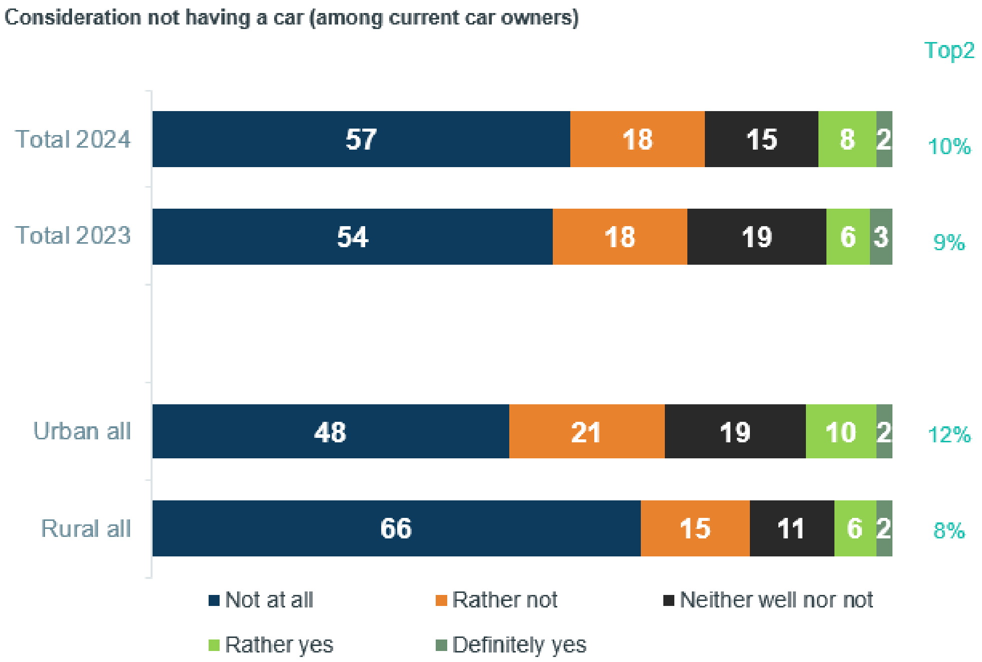
(11% in 2023 vs. 6% this year)



Base: Total sample (n=1004)

Question: Q2.6 Do you have the following means of transportation within your family?

The intention to leave the car remain low and stable with 10% considering to leave their car.

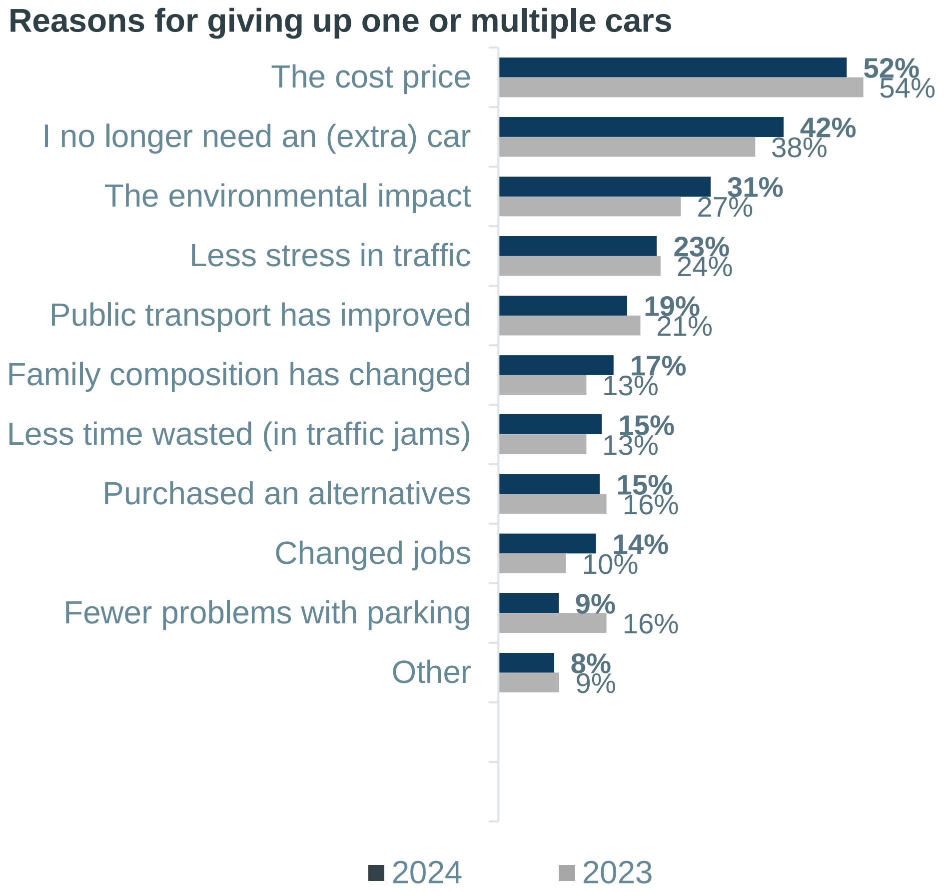


D'Ieteren

Base: Total net sample (n=1020)
Question: Q2.6 Do you have the following means of transportation within your family?
xx% Result 2021

Base: Total net sample (n=1020)
Question: Q2.6 Do you have the following means of transportation within your family?
**Families with cars exclusively via private or business lease are excluded from this breakdown*

The cost remains the most important driver to abandon the car



Base: People considering to give up one or multiple cars (n=137)
Question Q2.9C For which of the following reasons would you choose to give up 1 or more cars within your family?

D'Ieteren

Even in a mobility offer from the employer, the car is crucial. Due to the willingness to use alternatives as well, especially among younger aged people, flexibility becomes an asset.

If a mobility budget would be offered
(from employer)

The interest in having a car anyway is higher in:

- Rural areas compared to urban ones (55% vs 44%)
- Wallonia compared to Flanders (55% vs 47%)
- People older than 55 y.o.

Younger aged people (18-34) are more open to use the alternatives as well (47%)

Base: Total sample (n=1004)
Question: Q2.15 Imagine your employer gives you a mobility budget. Would you then …

Electrification of cars

Interest in electric cars has not further increased

With 39% intending to consider an electric car as their next purchase, the interest in buying an electric car has not further increased, while the interest in thermic cars remains intact.

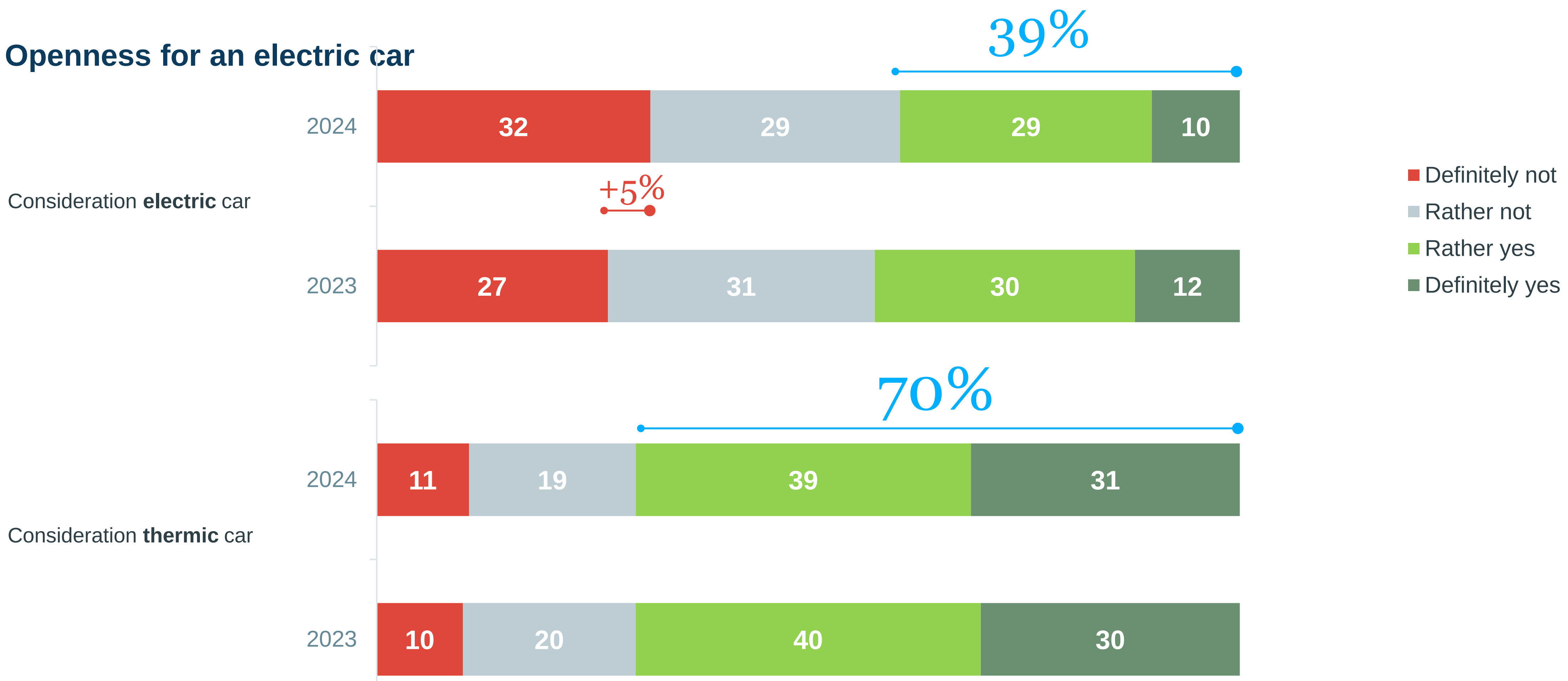
The conclusions of Polaris 2023 remain relevant: the perception that electric car lacks convenience & the cost (although the offer is larger & there are more basic models on the market), is still too high.

In addition, we also see that the need for private charging facilities is crucial. The majority of those without a driveway or garage see this as a barrier to not going for an electric car. Sufficient public charging stations are nevertheless going to be able to convince this group over than last year.

The installation of solar panels, which should be a catalyst for the electrification of the car fleet, are also rather stagnant.

Only 4 out of 10 Belgians do consider an electric car if they would have to buy a new car. Simultaneously: consideration of a thermic car remains high

Openness for an electric car

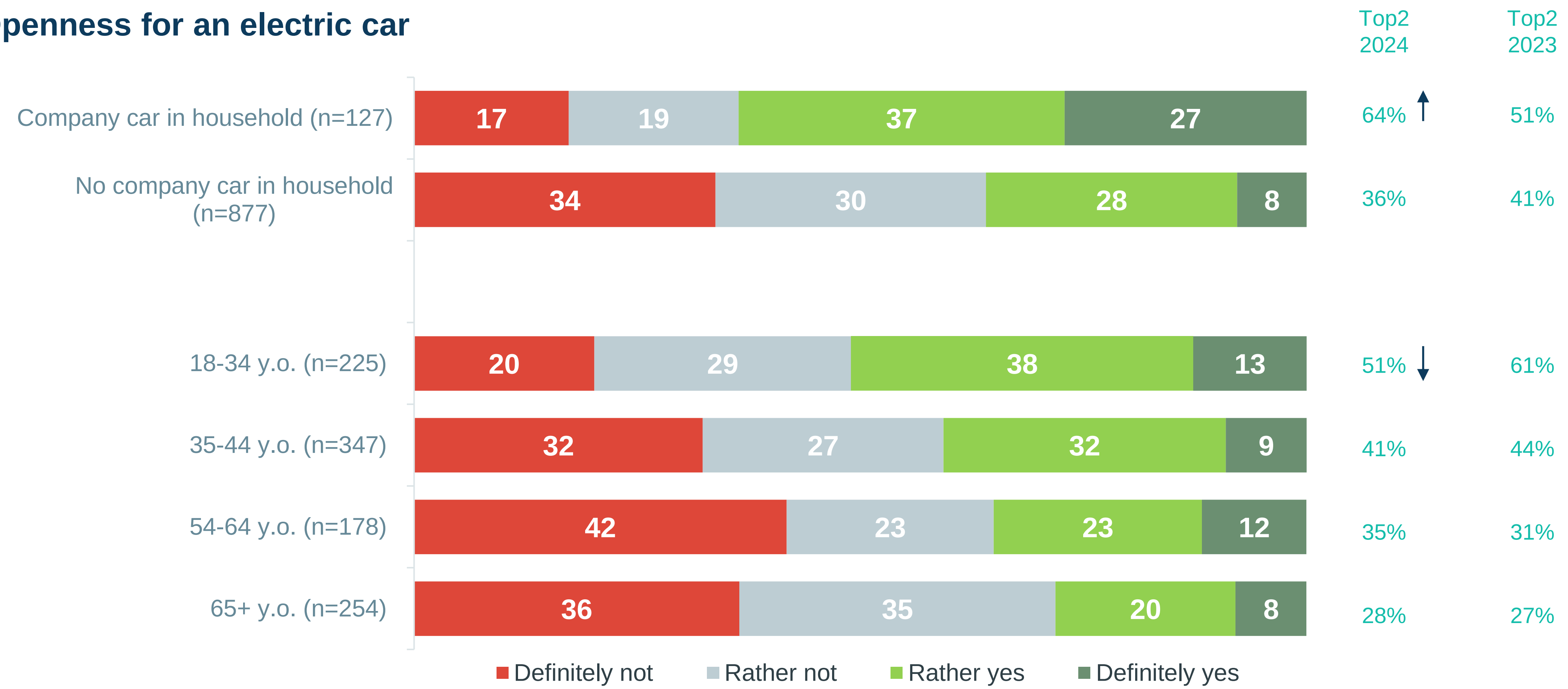


Base: Total sample (n=1004)

Question: Q3.14 Suppose you had to buy a new car tomorrow. To what extent would you consider an electric car? | Q3.19 Suppose you had to buy a new car tomorrow. To what extent would you consider a thermic car?

Especially among people with a company car in the household, the intentions to consider an electric car raised. Older age groups are not convinced to make the switch.

Openness for an electric car



D'Ieteren

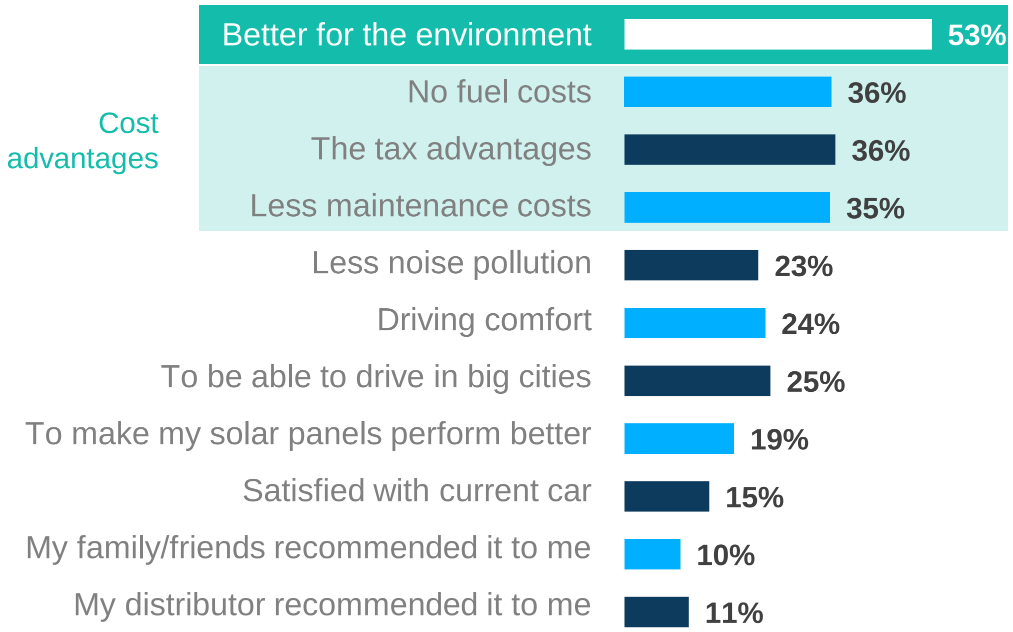
Base: *Total sample (n=1004)*

Question: *Q3.14 Suppose you had to buy a new car tomorrow. To what extent would you consider an electric car?*

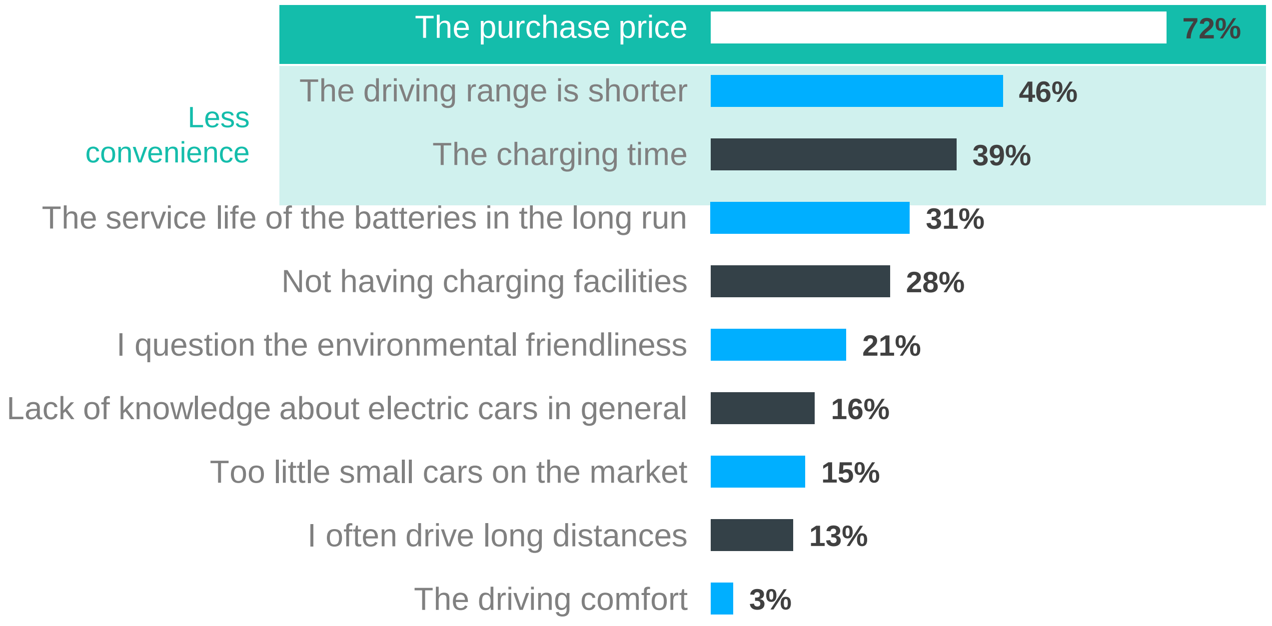
The environmental impact is still the most important driver next to cost advantages …

… the high purchase price is a large obstacle to for those that don't consider to buy an electric car. Additionally, with less convenience, value return is absent.

Drivers for an electric car



Barriers towards an electric car



There are no differences in the drivers & barriers as compared to 2023.

D'Ieteren

Base: Would consider buying an electric car (n=379)

Question Q3.14B Below is a list of reasons why you should consider an electric car. Which of these apply to you?

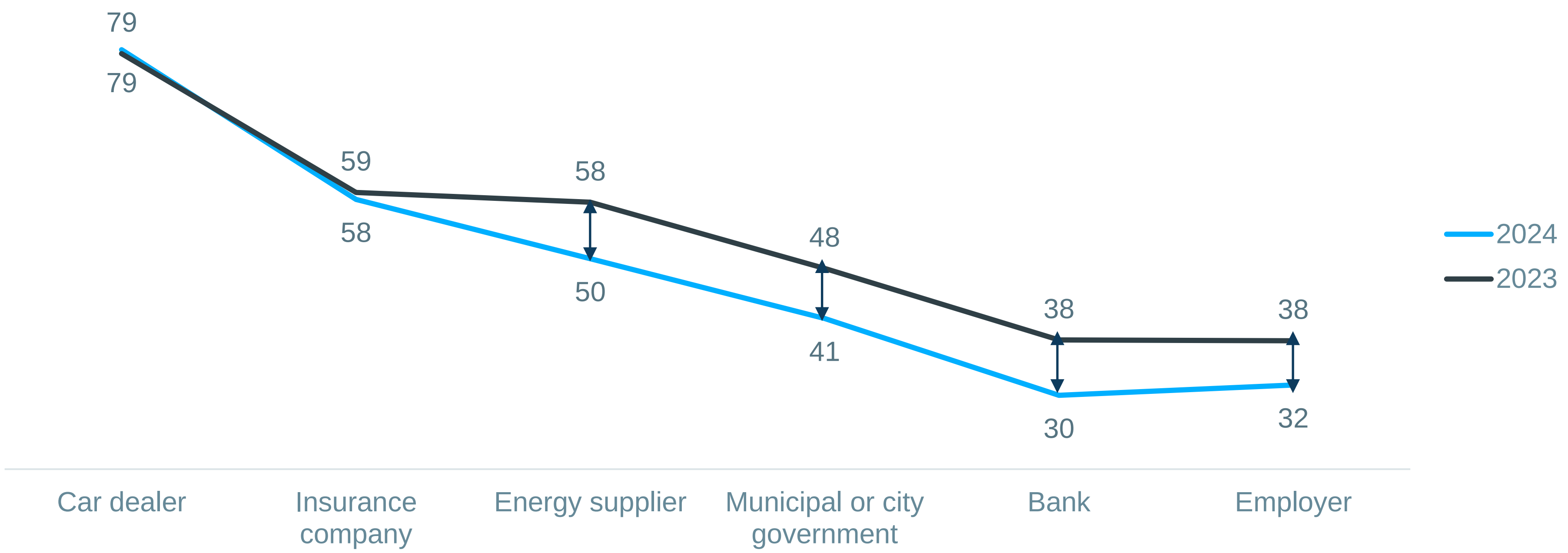
Base: Would not consider buying an electric car (n=594)

Question Q3.18B Below is a list of reasons why you would not consider an electric car. Which of these apply to you?

Institutions other than the car dealer or insurance company are less expected to provide information about the pros and cons of electric cars than this year.

Expectations about pro’s & cons of hybrid and electric cars

% Expect information of this organization

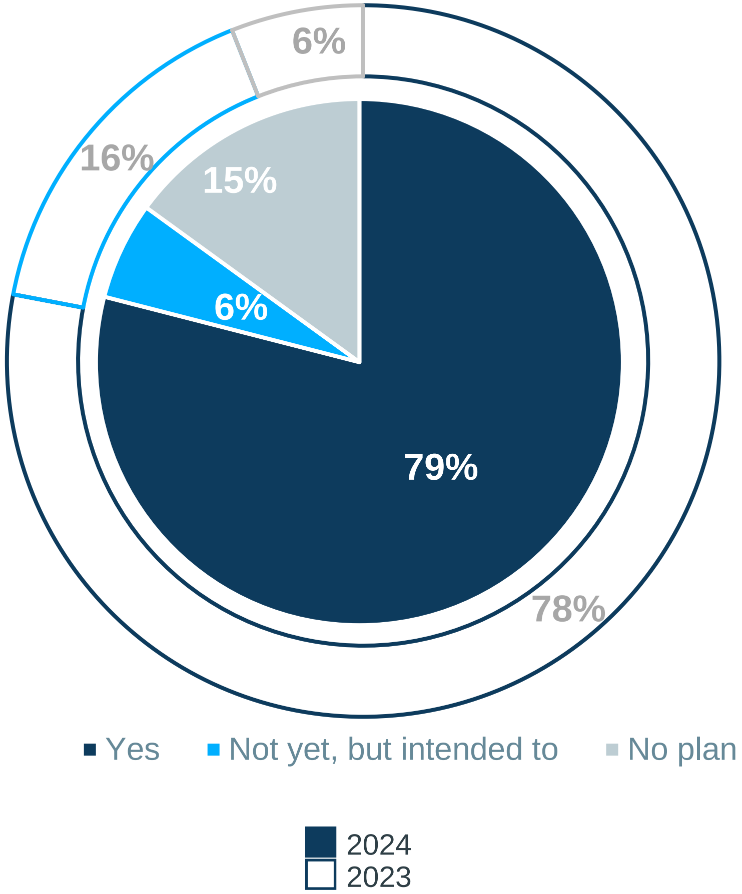


Base: *Total sample (n=1004)*

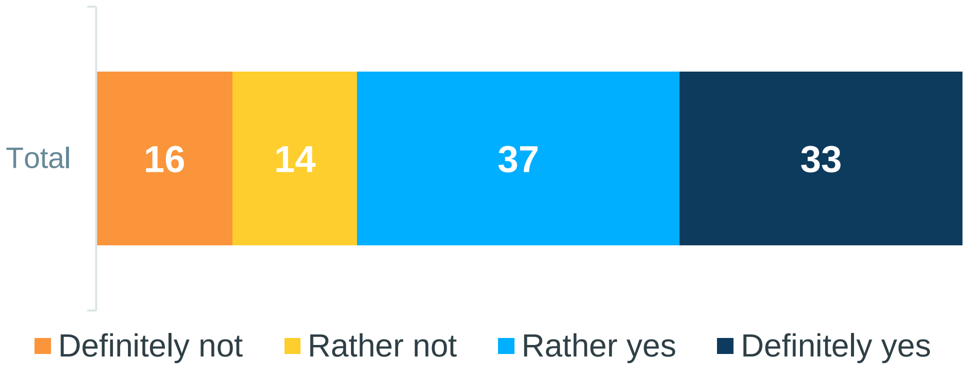
Question: *Q3.4 To what extent do you expect following parties to explain the pros and cons of an electric and/or hybrid car?*

Most people that have an electric car, also have a charging station with them. 70% of the people not driving yet an electric car will install one when they will drive an electric car

Charging station @home for electric cars owner



Intention to install a charging station @home for non electric cars owner when they will have one



Base: People with driveway / garage and have no electric car yet (n=730)

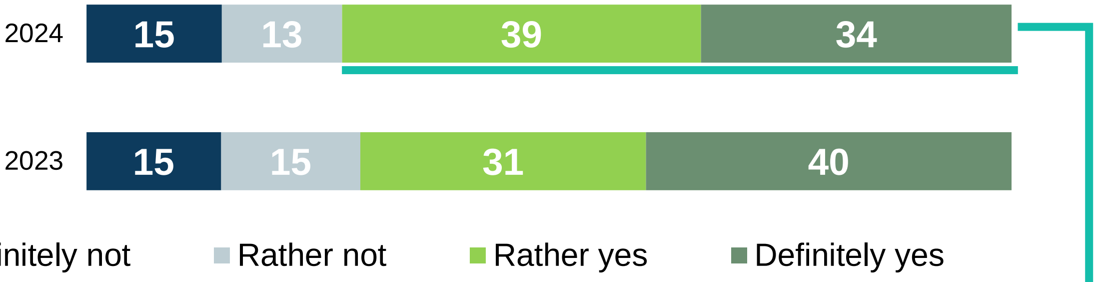
Question: Q3.6b You have your own driveway or garage. Imagine you want to buy an electric car, to what extent would you want to install a charging station?

Base: Have electric car in their family and have their own driveway (n=47)

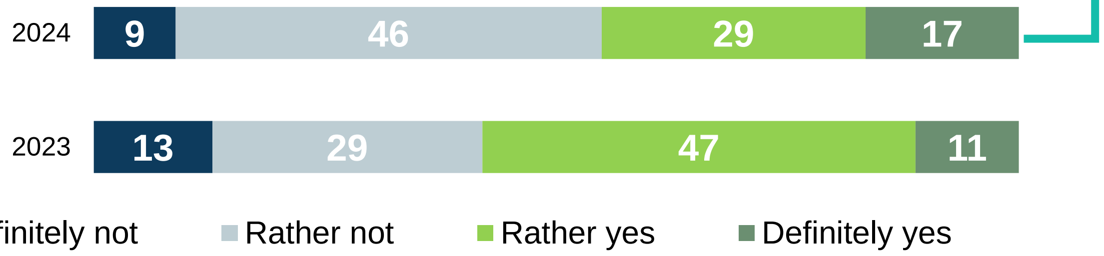
Question: Q3.6a You have your own driveway or garage. Have you installed a charging station for your electric vehicle?

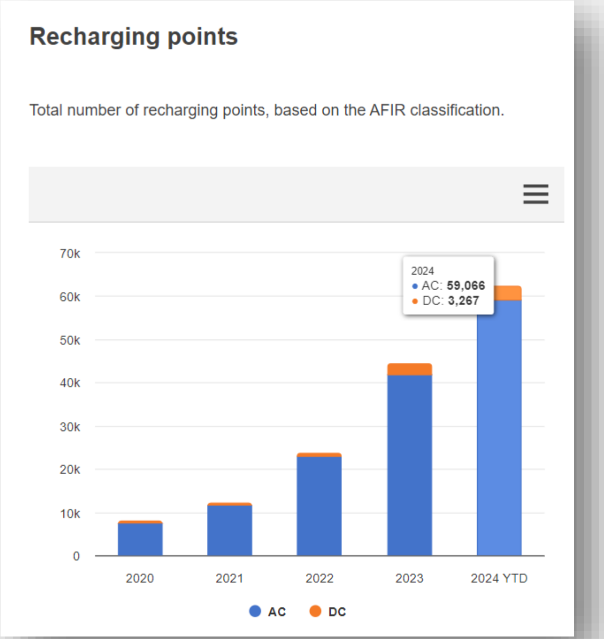
Among people that don’t have the possibility to have their own charging station:, not less than 73% indicated this is a major barrier and although the Belgian charging net increased rapidly ; enough public charging poles will not resolve this need.

Lack of own charging station among people that don’t have a garage or driveway, forms a major barrier.



But even if there are enough charging stations in their neighborhood, only 36% will reconsider to buy an electric car.





“ Zo is het aantal **gewone laadpunten (AC) in 2023 haast verdubbeld**, van 22.614 naar 41.903. Eigen aan de Belgische AC-laadinfrastructuur is dat ze grotendeels van het semipublieke type is.
Nog straffer is de evolutie bij de **snellaadpalen (DC).** Waren er eind 2022 nog maar 894 in ons land, dan was dat aantal eind 2023 al opgelopen tot 2.460. Dat stemt overeen met **een groei van 275 procent**.

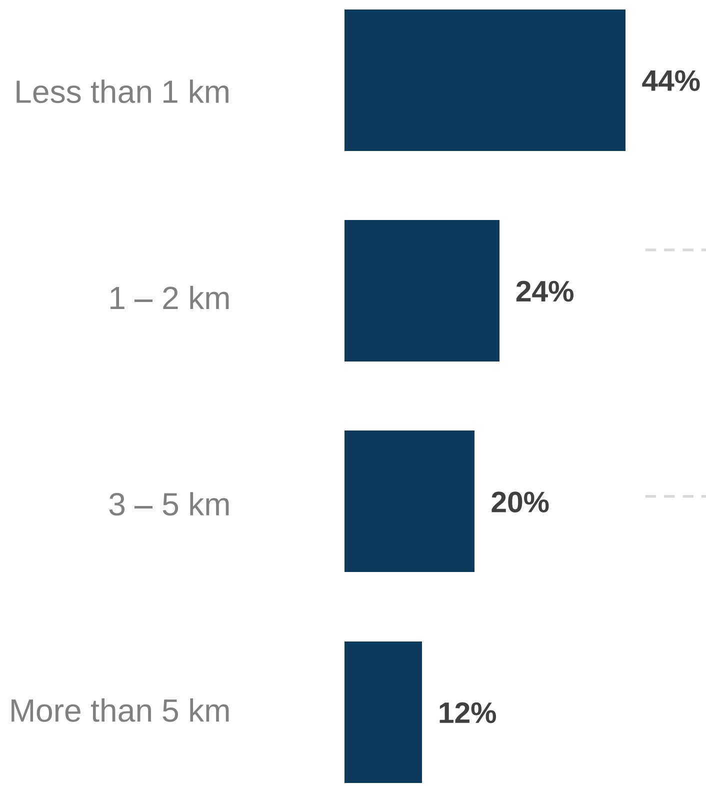
External source:
https://alternative-fuels-observatory.ec.europa.eu/transport-mode/road/belgium
Autogids.be; 27/06/2024

Base: People without driveway / garage and have no electric car yet (n=217) | People that see this as a barrier (n=155)

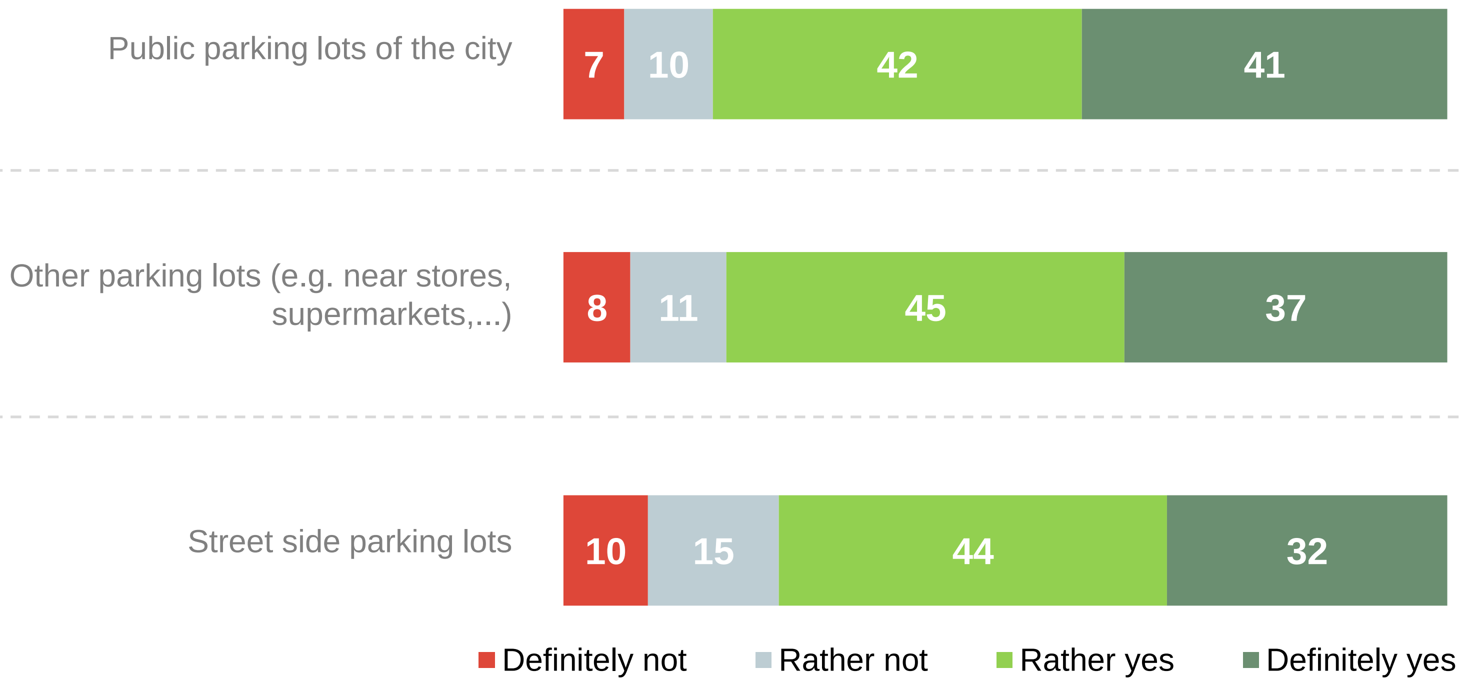
Question: Q3.8 You don’t have your own driveway or garage. To what extent is the lack of an own charging station decisive in the decision not to purchase an electric car? | Q3.9 Suppose your municipal or city government i n your town or city provides a generous number of charging stations in various locations at a price that is reasonable for you to charge your car. Would this convince you to purchase an electric car?

Charging whishes don’t differ from past year: charging stations should be near enough. 44% want to have one in less than 1 km distance. Meanwhile, we expect charging stations to be “everywhere” – close to (parkings) and street sides.

Distance to charging station



Locations for charging stations (expectations)



D'Ieteren

Base: People that don’t have an electric car (n=947)
Question Q3.12 Suppose you have an electric car, how far from your own residence would you want to drive maximum for the nearest charging station, if you did not have your own charging station?

Chapter 3

Other mobility Knowledge & interest

Other mobility – knowledge & interest

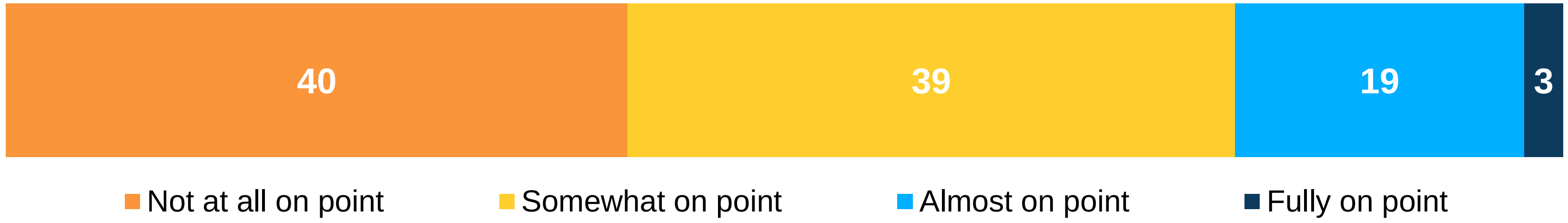
Adoption of other mobility solutions continues (and likely will continue) to be primarily driven by the younger generation.

- Belgium is not yet ready for **self driving taxis**. People are mainly concerned about the safety related aspects.
- About half of the companies is offering a **bicycle leasing option**, but only 7% of employees is using it. 19% is considering to start using it though.
- 36% of bike owners are willing to pay for **secure bike parking**.
- 73% would be ready to install an **Energy Management System** to reduce their energy bill. Less people (57%) are open for a **dynamic energy tariff** (which implies an uncertain price).

The majority is not yet ready for self-driving taxis, they believe that the self-driving technology is not yet on point to do so.

Intention to use self-driving taxis

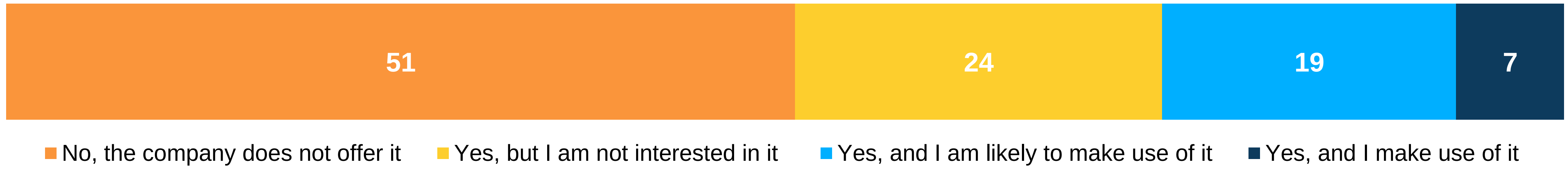
Current state of self-driving technology



Base: Total sample (n=1004)
Question: Q2.19 If driverless taxis were offered for journeys on public roads by 2027, within a limited route, e.g. Brussels - Antwerp. To what extent would you be willing to use such a service? | Q2.21 To what extent do you think today's technology is on the verge of making cars autonomous (driverless)?

About half of the companies is offering a bicycle leasing option, but only 7% of employees is using it. About 1 in 5 is considering to start using it though.

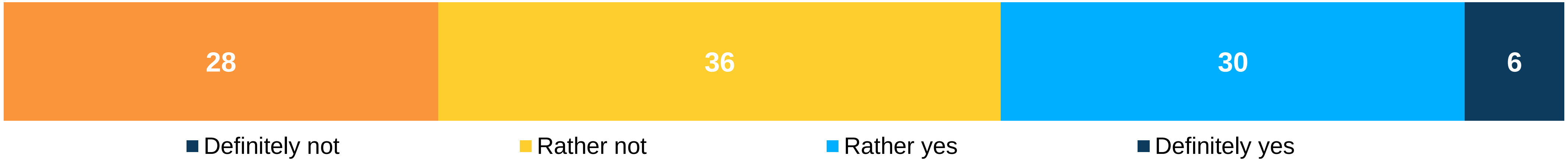
Company offering a bicycle leasing option?



Base: *Employees (n=496)*
Question: *Q2.16b Does your company offer a bicycle leasing option in exchange for part of your salary or other allowances?*

36% of bike owners are willing to pay for secure bike parking.

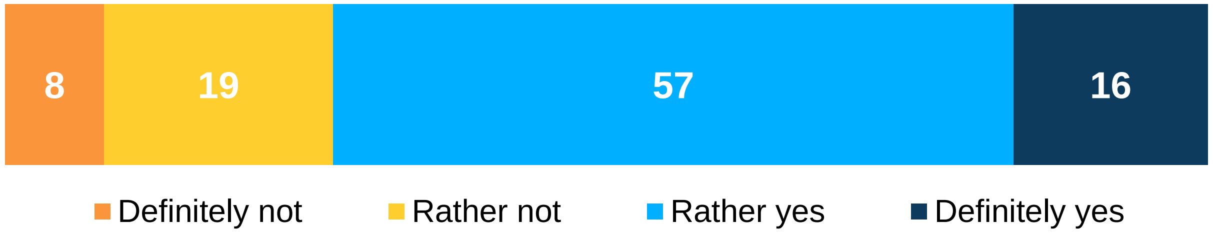
Willingness to pay for bike parking / bike parking boxes



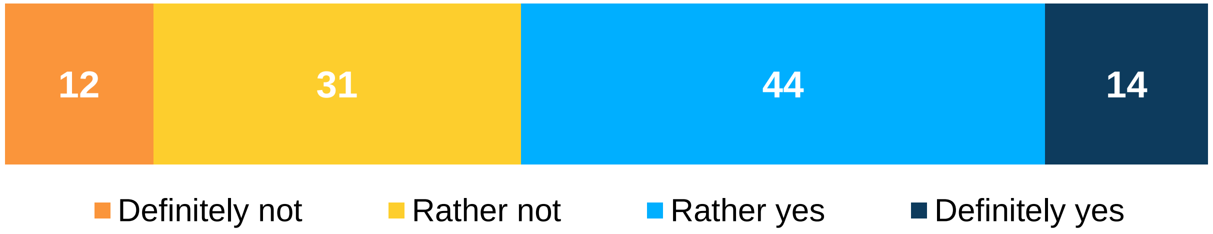
Base: Bike owners (n=559)
Question: Q4.4 Are you willing to pay to make use of secured bikeparkings or boxes?

73% would be ready to install an Energy Management System to reduce their energy bill. People are less open to opt for a dynamic energy tariff (which implies an uncertain price).

Intention to install Energy Management System (EMS)



Intention to opt for dynamic energy tariff



Older people (65+):
higher intention to install
Energy Management System

Younger people (18-34y):
more prone to opt for dynamic
energy tariff

Base: *Total sample (n=1004)*
Question: *Q1.4 Would you opt for an energy contract with a dynamic tariff if it ensures that your electricity bill goes down?*
Q1.5 Would you install an energy management system (EMS) at home if it would help you reduce your electricity bill?

Fleet Insights: Profiling & composition

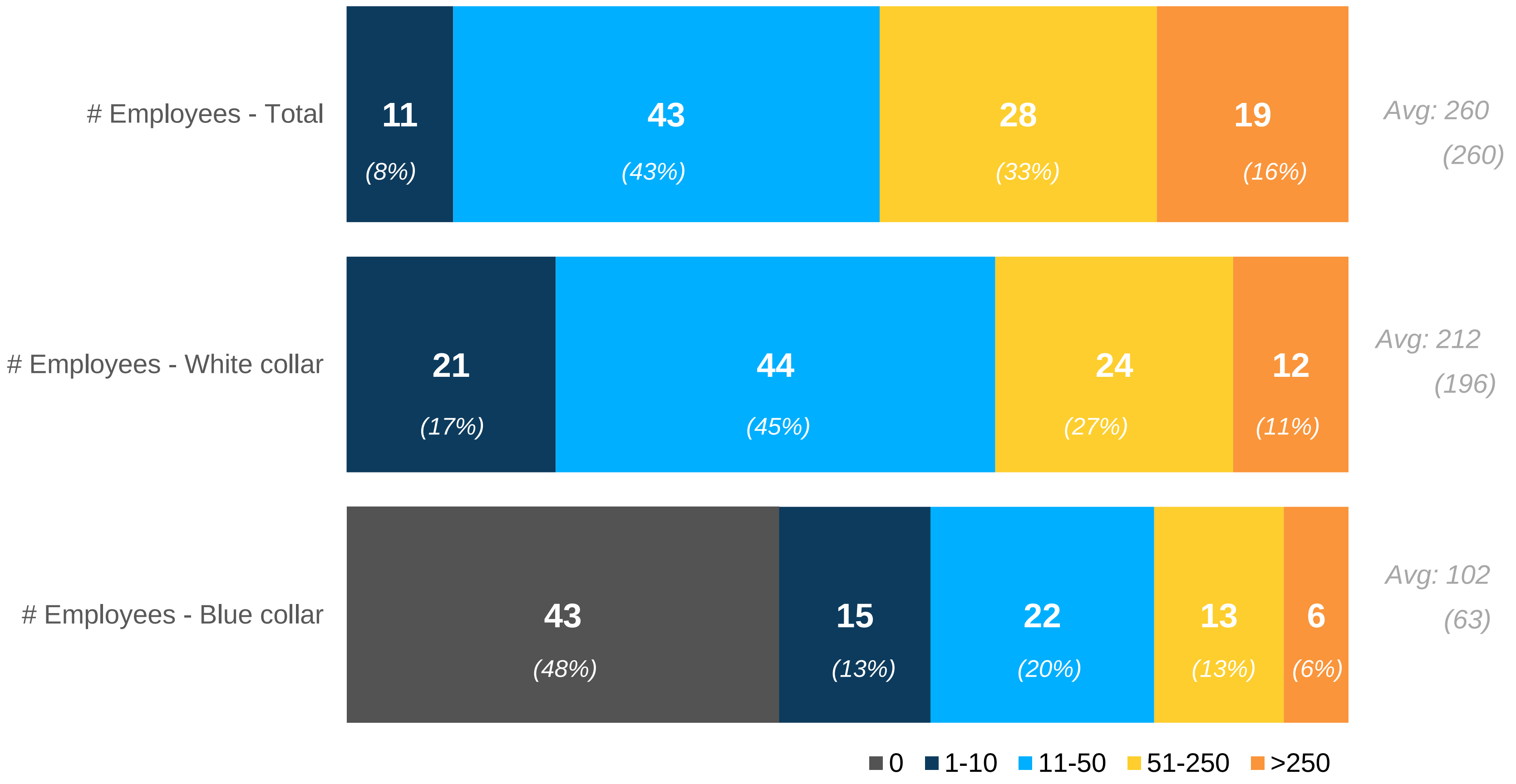
Profiling & composition

Fully electric cars have raised their share within car fleets, but Thermic car will still be part of the fleets in the foreseeable period of time:

- The number of **fully-electric company cars** raised strongly compared to a year ago (from 10 tot 17%), with Flanders taking the lead (from 12 to 20%). The number of Hybrid cars remained stable.
- **Mobility offerings** among companies **remained quite stable**

54% of participating companies have less than 50 employees, 46% has more than 50 employees. This composition is similar to 2021 and 2023.

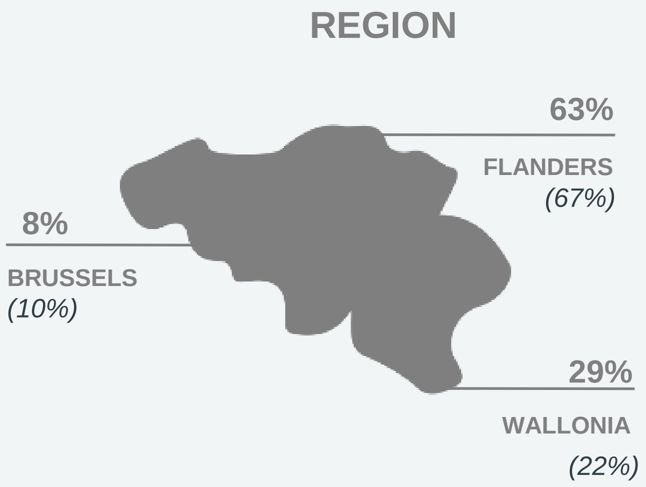
Employee composition

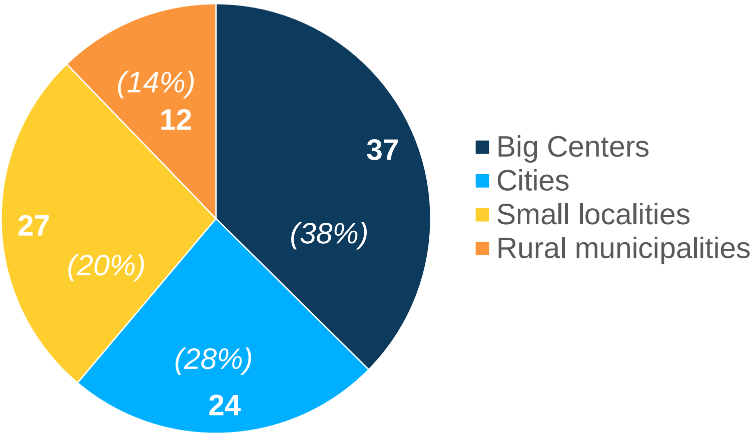


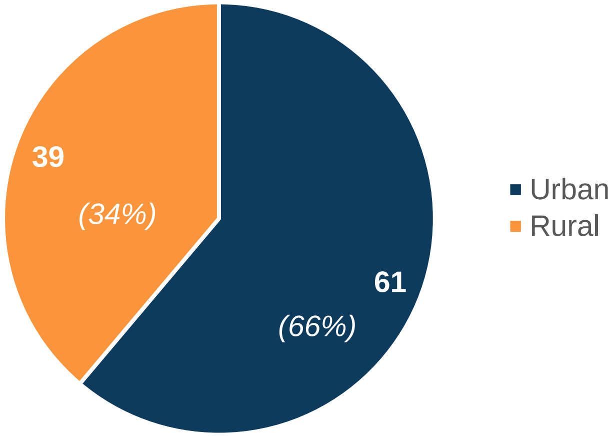
Base: *Total sample (n=139)*
Question: *Q1.2 How many employees does your company have?*

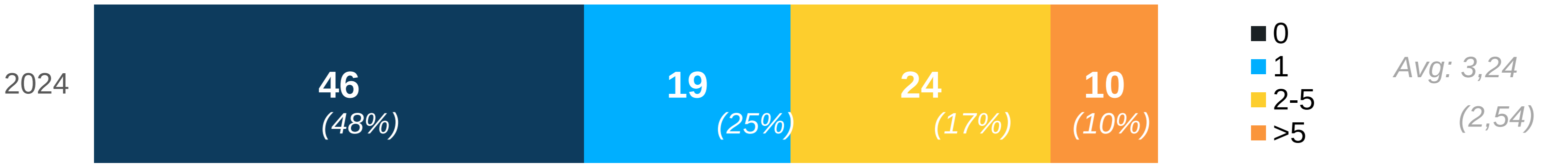
Based on geographical location, with 63% fleet managers in Flanders, the sample is very similar to the 2023 measurement.

Location







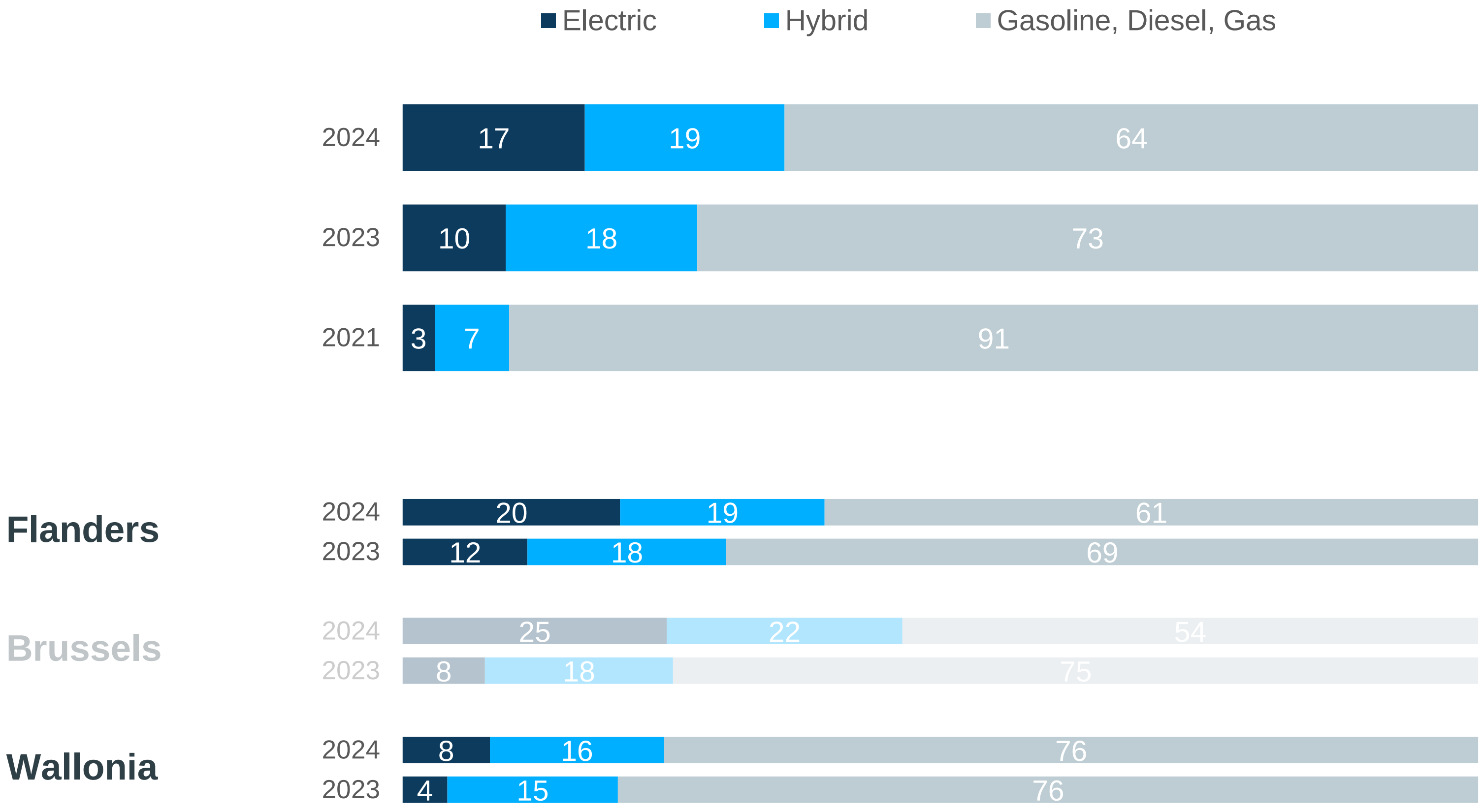


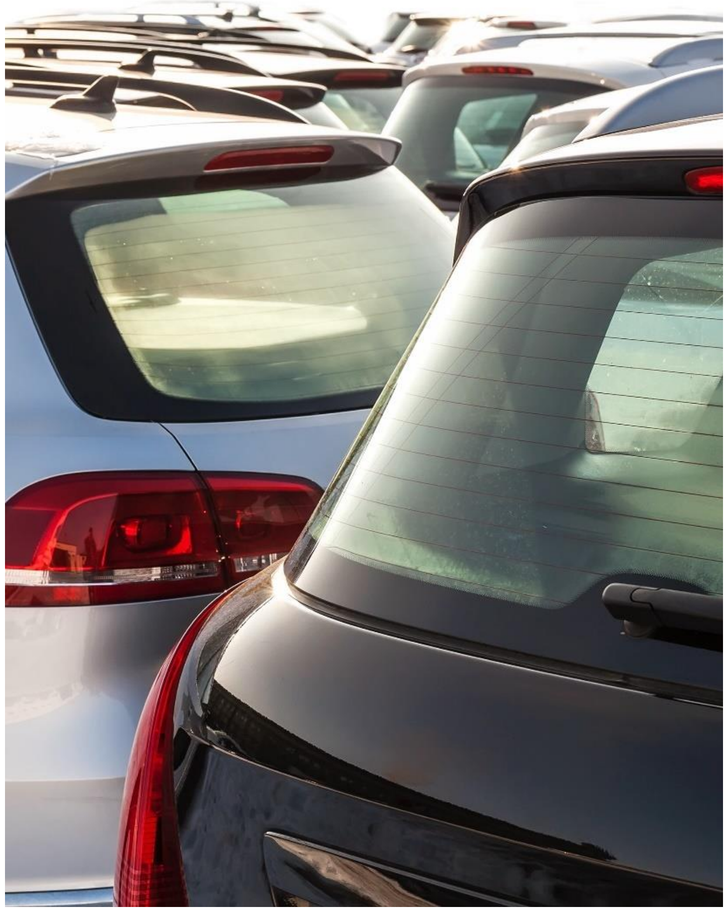
Base: *Total sample (n=139)*
Question: *R1 What is the postal code of your headquarters? | Q1.1 How many other sites has your company?*

D'Ieteren

The transition towards electric vehicles within fleets continues rapidly. Flanders is taking the lead, with already 1 fifth of the salary cars being fully electric. The incidence of hybrid cars as compared to past year is stable.

Salary car composition

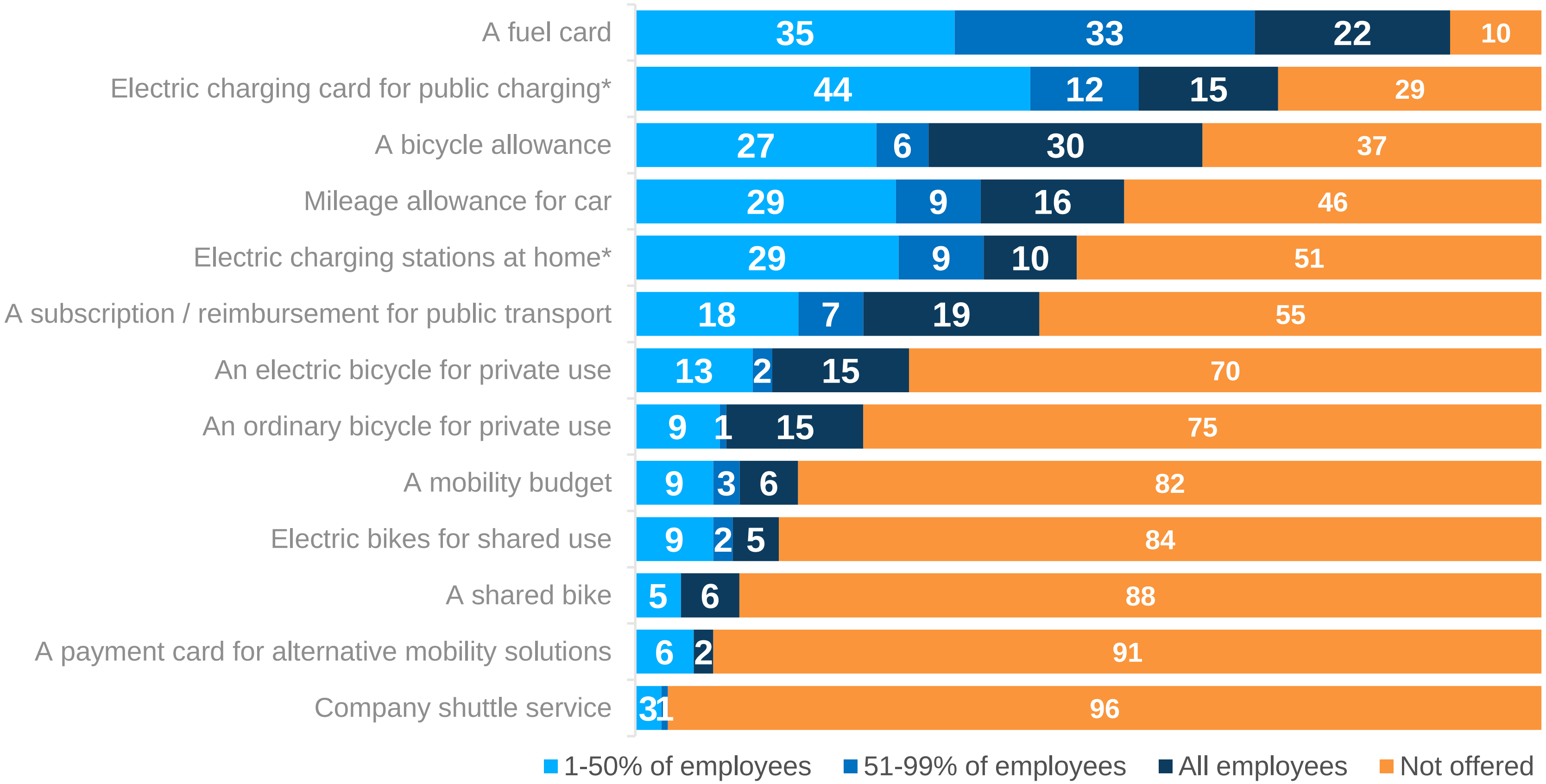




Base: *Companies with company cars (n=137)*
Question: *Q1.4b How many company cars does your company have? | How much of them are salary cars?*

Among companies that have electric cars in their fleet, there is a decrease in the offered charging poles at home. This means that a (new) electric car is not automatically accompanied with a charging pole.

Mobility offer



% Offered

	2024	2023
A fuel card	*90*	*88*
Electric charging card for public charging*	*71*	*74*
A bicycle allowance	*63*	*63*
Mileage allowance for car	*54*	*57*
Electric charging stations at home*	*49* ↓	*60*
A subscription / reimbursement for public transport	*45*	*46*
An electric bicycle for private use	*30*	*26*
An ordinary bicycle for private use	*25*	*22*
A mobility budget	*18*	*15*
Electric bikes for shared use	*16*	*14*
A shared bike	*12*	*10*
A payment card for alternative mobility solutions	*9*	*8*
Company shuttle service	*4*	*3*

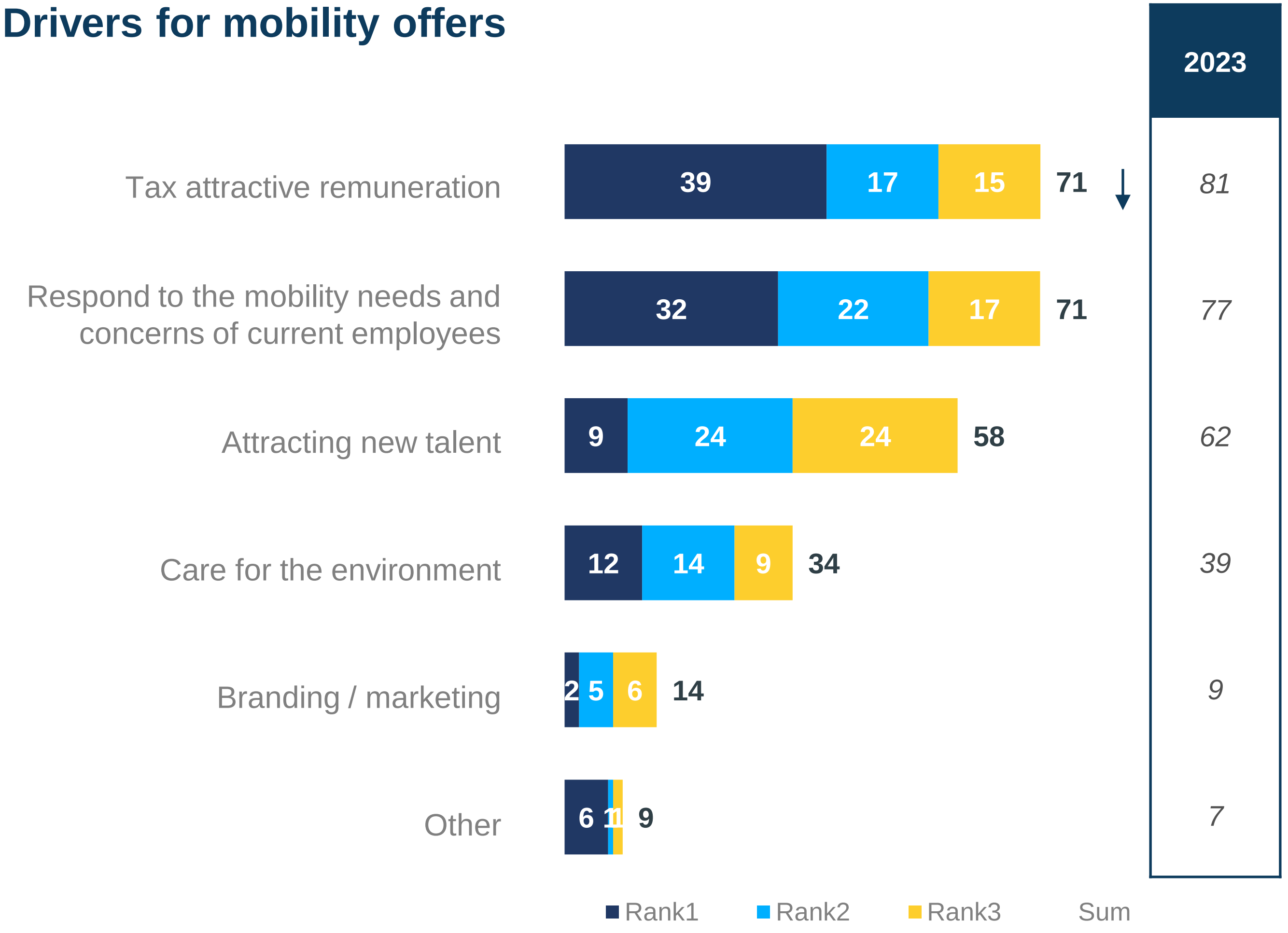
Bikes for private use are (just like past year) offered more often in Flemish companies.

D'Ieteren

Base: *Total sample (n=139)*
Question: *Q1.5 Which of the following elements does your mobility offer consist of today? And what proportion of your employees is it offered to?*

The attractive tax remuneration is equally important as responding to mobility needs & concerning for companies in their mobility offers.

Drivers for mobility offers



Attracting new talent is a more important driver among companies with more than 40 employees (63%)

Base: Total sample (n=139)
Question: Q1.6 How is the mobility offering within your company primarily driven?

Other insights

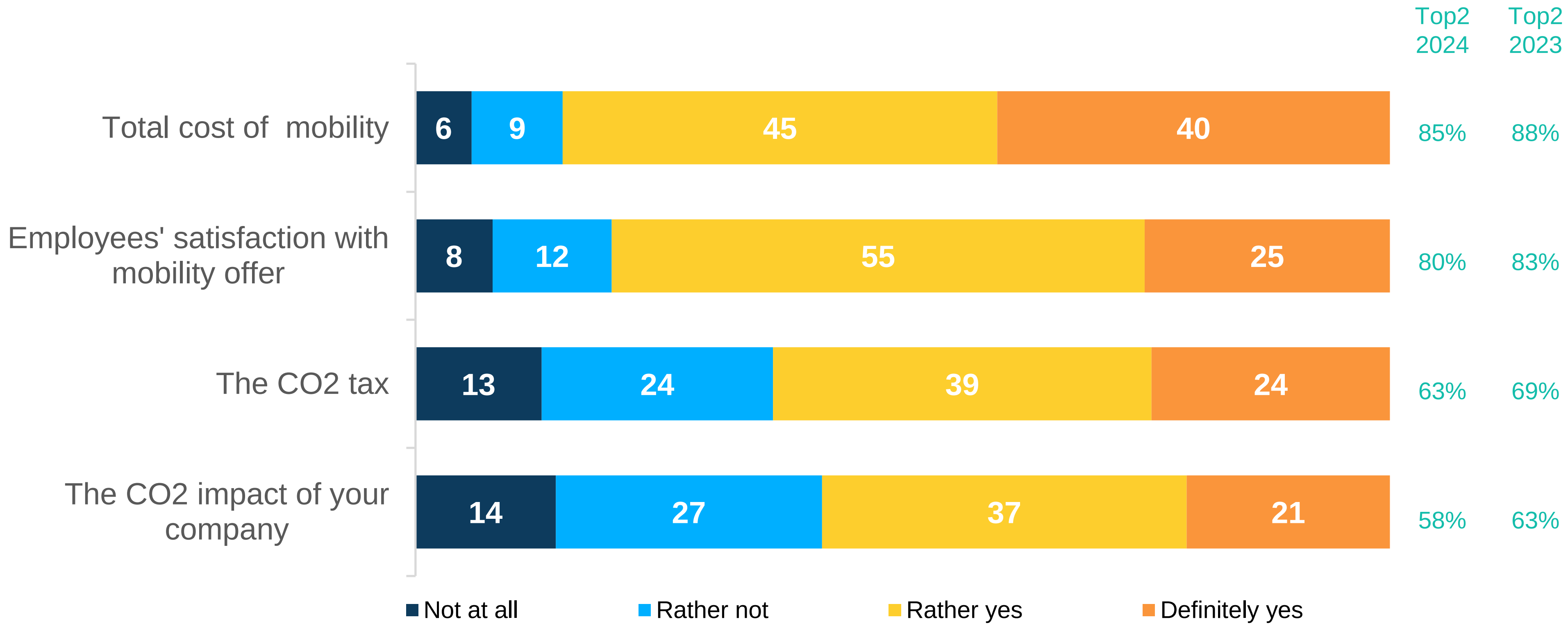
Flexibility for employees on the radar of companies

Although fleet managers don't expect much change in the mobility behaviour of employees, they think that there is a wish to use other mobility alternatives next to their cars.

Awareness among fleet managers about the CO2 tax or CO2 impact of the company due to their mobility policy has not grown.

We don’t notice an increased awareness among fleet managers about the CO2 tax or CO2 impact of the company due to their mobility policy. 4 out of 10 has no view on they CO2 impact.

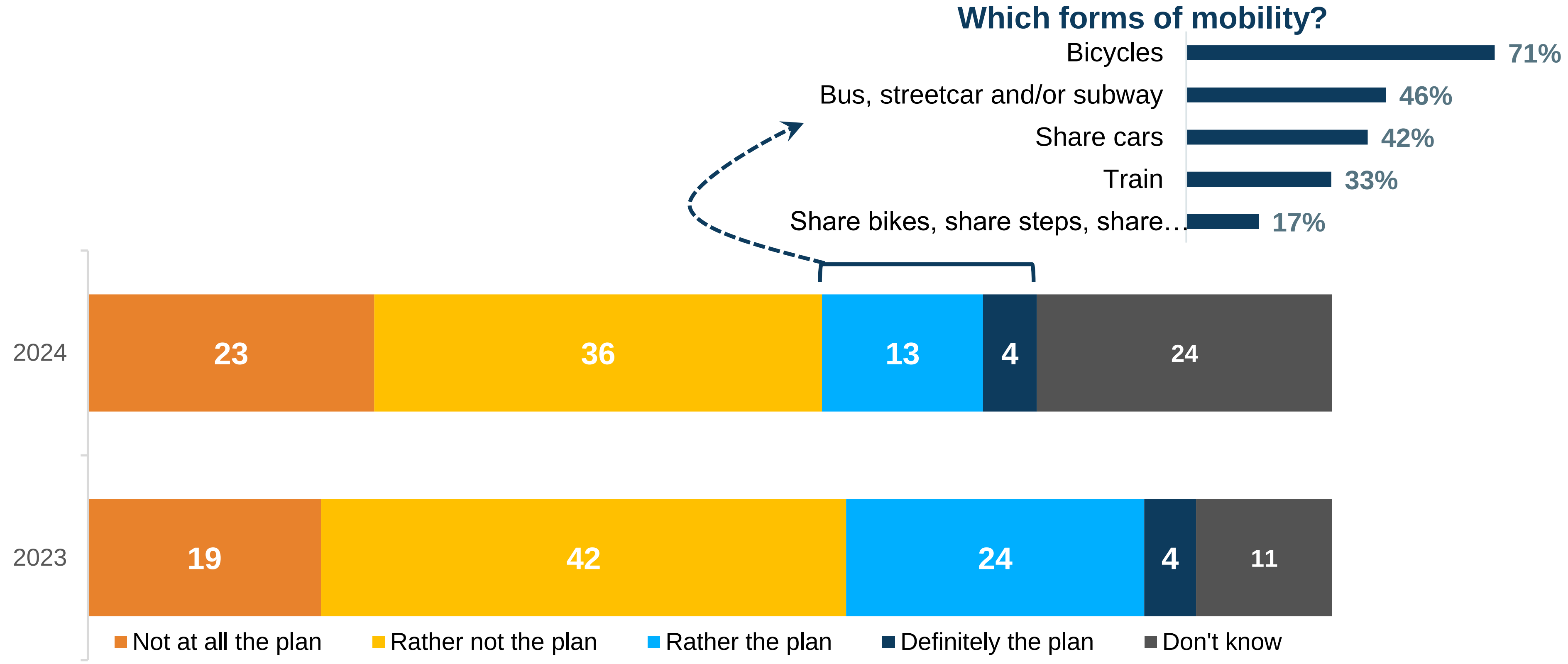
Insights on mobility

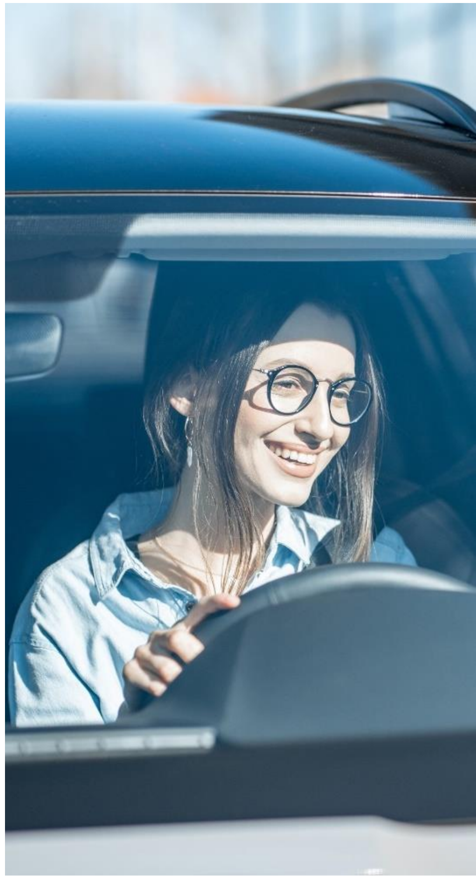


Base: Total sample (n=139)
Question: Q1.7 To what extent today do you have a view of ... ?

Confirming earlier insights among consumers, companies too don't expect their employees to change their mobility behaviour.

Change in mobility behaviour among employees



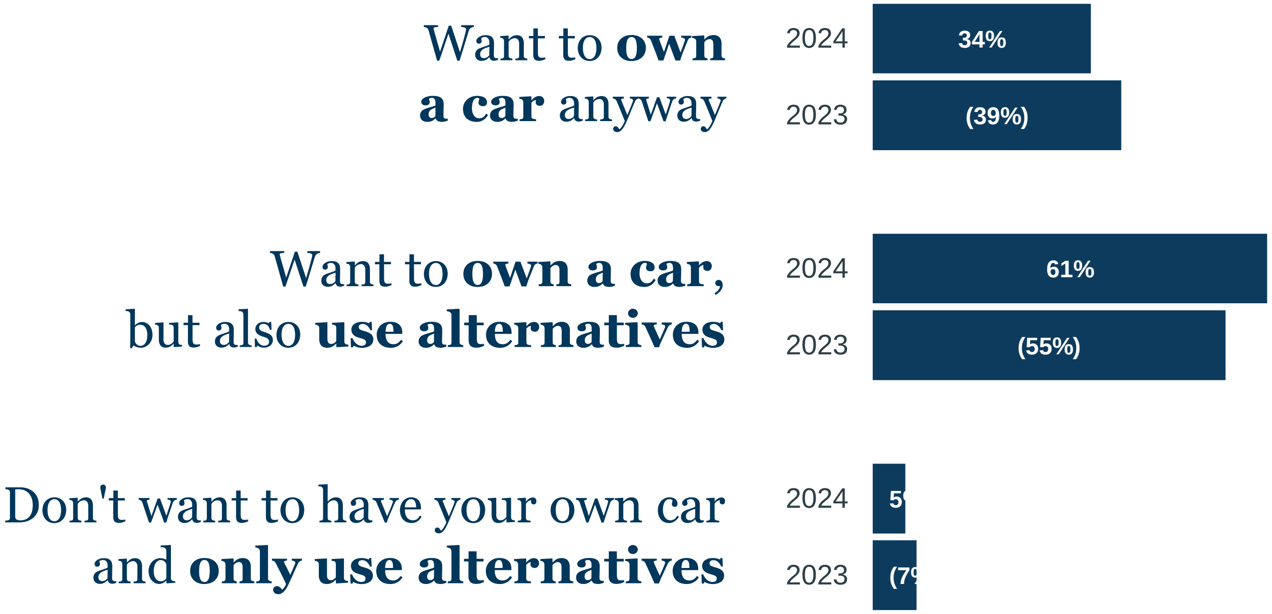


Base: *Total sample (n=139) | Think that employees will change the way they move (n=24)*
Question: *Q1.9 To what extent do you think your employees plan to change the way they move in the coming years?*
Q1.9a What form of mobility will your employees strive for (more)?

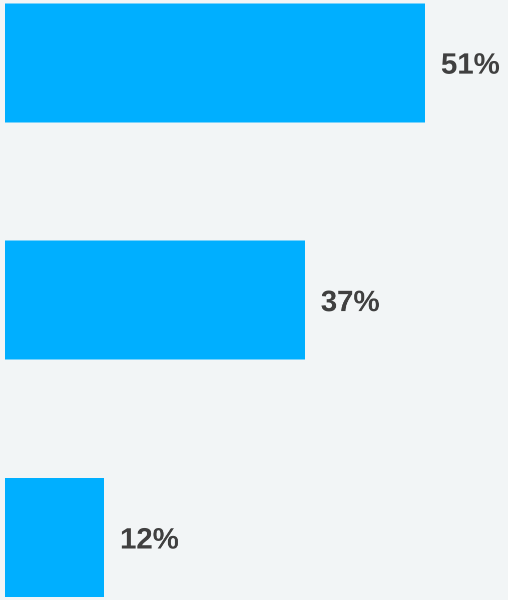
D'Ieteren

Employers estimate their employees would still prefer an own car, mostly including alternatives as well. Comparing with the Customer insights, employers tend to be even more flexible and provide alternatives too.

Mobility budget (from employer)



Customer results



Base: Total sample (n=139)
Question: Q1.11 Imagine that tomorrow there is a mobility budget for everyone where an employee can choose for … Do you think that most employees would… ?

© D'Ieteren Automotive S.A. – September 2024
All rights reserved, no copy or usage without previous authorization

D'Ieteren