



# Polaris Study 2025

Creating the mobility of the future





# Our Polaris Survey

Towards new challenges for the mobility of tomorrow

**D'leteren reaffirms its ambition to be the natural choice for mobility in Belgium. To achieve this, the group continues to expand its offering of mobility products and services, going well beyond its traditional core business of car sales and distribution.**

In response to evolving customer expectations and market dynamics, Project Polaris was launched in 2021 as a strategic initiative to assess and future-proof D'leteren's positioning.

Following a first update in 2023, the 2025 edition marks the fourth wave of this extensive study.

This year's edition takes a closer look at key developments such as the electrification of the vehicle fleet and growing openness to new forms of mobility, reflecting the major shifts currently shaping the industry.

The study was conducted in collaboration with the independent research agency Profacts.

# POLARIS 2025



## Table of contents

**1. Background, objectives & methodology**

**2. Key conclusions**

**3. Key insights in more detail**

- **B2C insights (incl. fleet driver)**
- **Fleet (B2B) insights**

# Methodology



## METHODOLOGY

B2C: Online (web) research  
B2B: Online (web) research



## SAMPLE SIZE

B2C: N = 1000  
B2B: N = 202



## WEIGHTING

B2C: weighted to be representative for the Belgian population (18+)  
B2B: no weighting was applied to the B2B sample



## SAMPLE DESCRIPTION

B2C: a representative sample of Belgians (18+) (Profacts panel)  
B2B: fleet managers (n=100 Profacts panel + n=102 client panel (\*))



## FIELDWORK PERIOD

B2C: 20/06/2025-30/06/2025  
B2B: 19/06/2025-01/07/2025

(\*) this is different from 2024, where only client panel was used

Chapter 2

# Key conclusions



# Overall conclusion Polaris 2025 - Belgian population

*A fundamental change in the mobility landscape has not yet taken place, however we do see some evolutions vs last year's results.*

## 1. MOBILITY BEHAVIOR & CAR OWNERSHIP

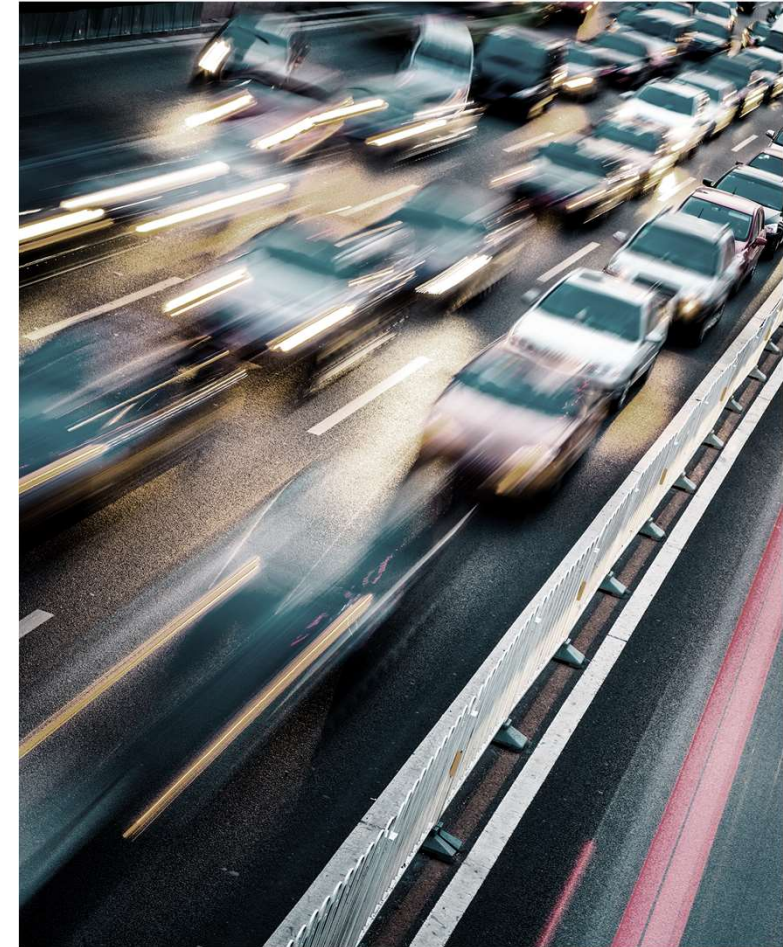
- Mobility habits remain stable; the car continues to dominate.
- Electric bikes are rising, especially in Flanders and Brussels.
- 89% of households own at least one car; 36% own two or more.
- 17% have a company car, mostly electric/hybrid.
- Little interest in abandoning cars, but growing openness to reduce the number of vehicles.

## 2. ELECTRIC VEHICLE ADOPTION

- 39% consider an EV for their next car – unchanged from 2024.
- Thermic cars remain popular (72%).
- Private charging is key; public stations alone are insufficient.
- 50% want a charging point within 1 km of their home.

## 3. SHARED MOBILITY & MOBILITY BUDGET

- Shared mobility usage stagnates (40% used it last year); mostly among youth and urban dwellers.
- 63% are not considering shared mobility in the future.
- Mobility budget awareness is high (2/3), but only 23% understand it and 5% use it.
- In employer mobility offers, cars remain central (37% of budget), followed by cash (29%).



# Overall conclusion Polaris 2025 - fleet/mobility managers

## 1. ELECTRIFICATION ACCELERATES

- EV share in company fleets jumped from 17% (2024) to 32% (2025).
- Petrol vehicles are declining; hybrid remains stable.
- Flanders leads with 36% of fleet cars fully electric.
- Companies expect EVs to represent nearly 50% of fleets within two years

## 2. MOBILITY BUDGET ADOPTION

- More companies offer mobility budgets or alternatives,
- Yet, 50% still don't consider implementing one, citing lack of employee interest.
- Fleet managers are positive about mobility budgets, but believe employees still prefer car ownership.
- Clear documentation and legal/tax guidance are key to future adoption.

## 3. BIKE LEASING

- Interest in bike leasing is growing (41% in 2025 vs 36% in 2024), mainly electric bikes.



### Chapter 3

## Key insights in more detail

- B2C insights (incl fleet driver)
- Fleet (B2B) insights



## 3.1 B2C insights (incl fleet driver)

Mobility solutions & mobility behavior in general

Relationship between Belgians and their cars

Electrification of cars & charging stations

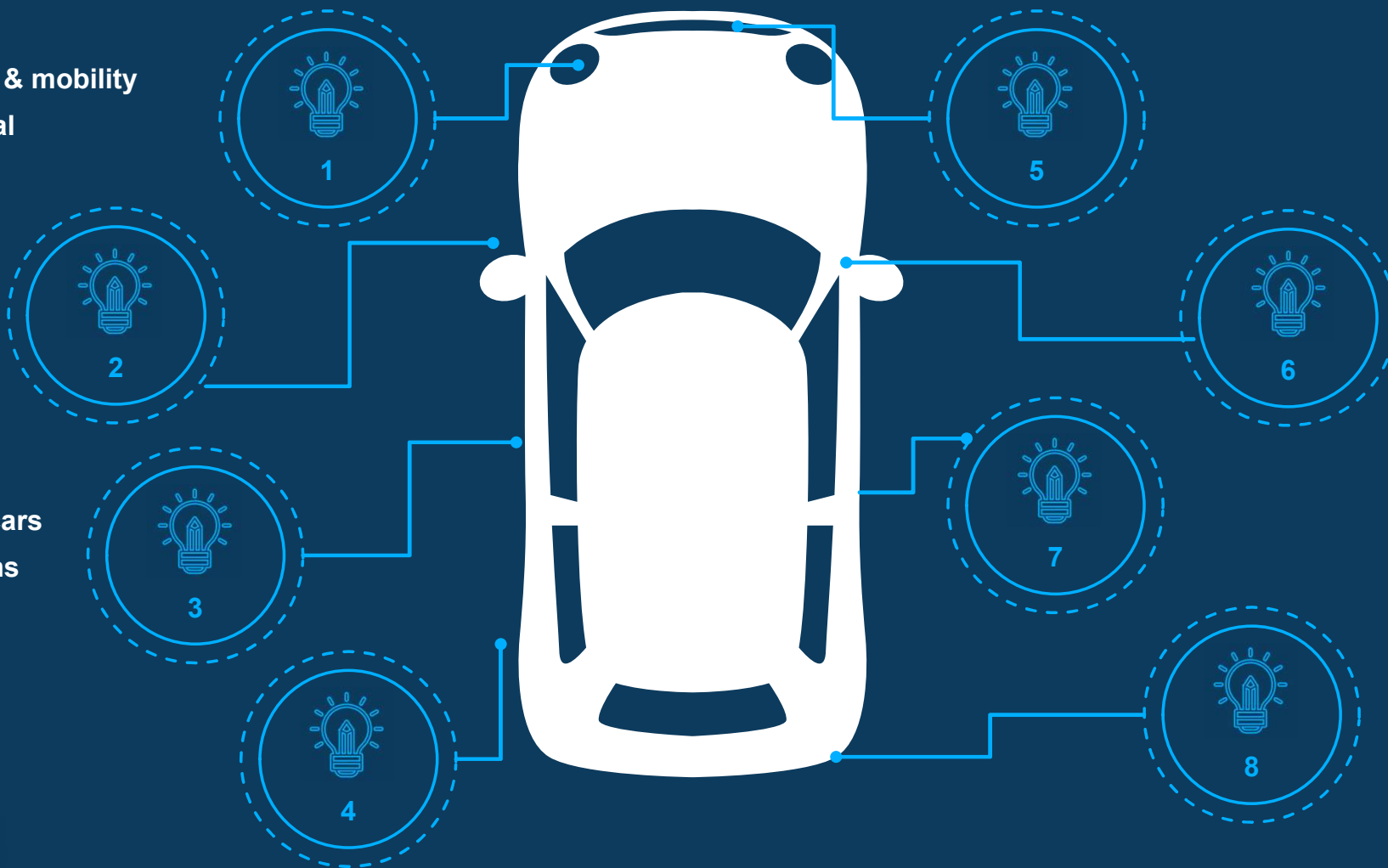
New cars

Shared mobility

Mobility budget

Other mobility solutions

Future trends





# Mobility solutions & mobility behavior in general

# Mobility solutions & mobility behavior in general

**Mobility behavior is quite similar to last year, including little intention to change.**



**In general, results about mobility behavior are in line with those of past years, guiding us to similar conclusions.**

- The car has a central role in the mobility solutions of Belgians, today and tomorrow. Transport “on foot” remains in second place.
- Worth noting however is that we notice an increase for (normal) electric bikes, especially in Flanders (where bike usage was already higher) and Brussels.

This brings the bike almost at the same level of public transport (and in Flanders even above it).

























































In Wallonia, the use of bikes keeps lacking behind.

- Also, the car is somewhat less popular in Brussels, while public transport and (electric) step/scooter/motorbike are more popular.

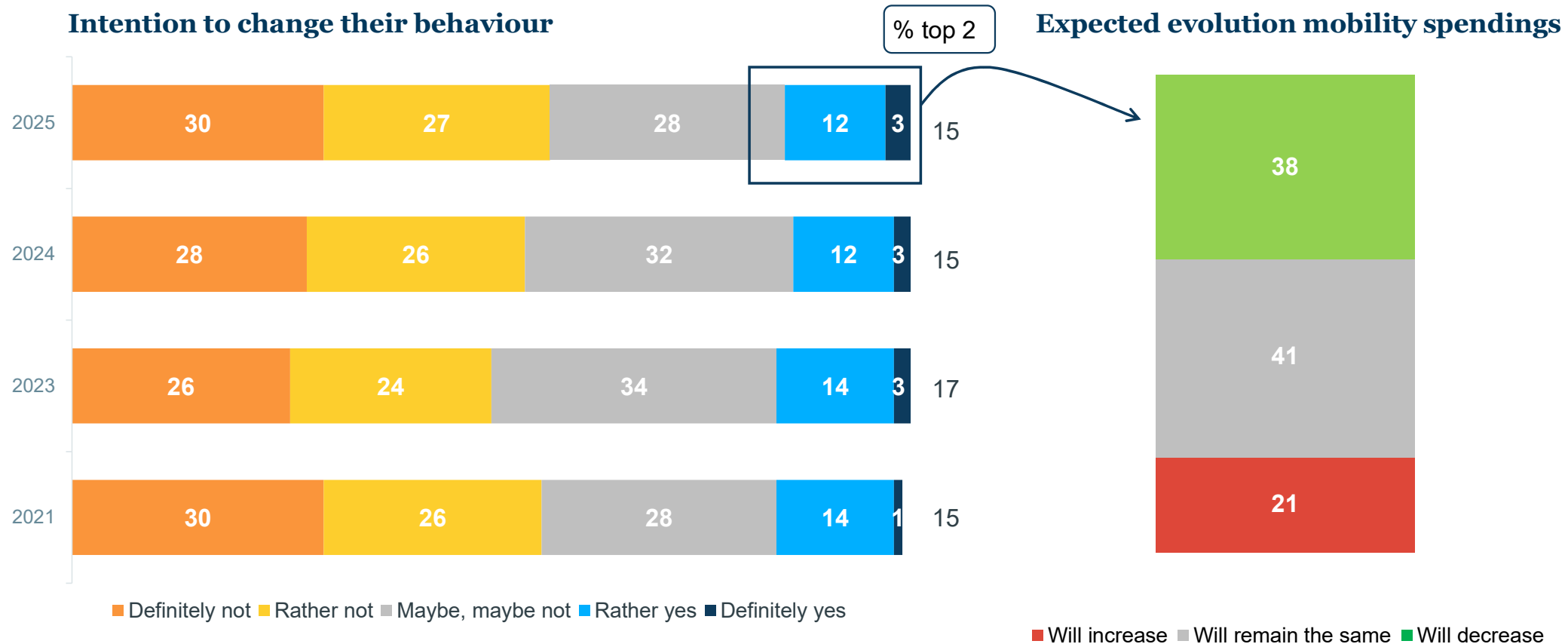
**This behavior is not expected to change drastically, hence limited impact on mobility spendings can be expected.**

The car remains very dominant in the mobility landscape, although there are very strong regional differences. The car is somewhat less popular in Brussels, while public transport and step/scooter/motorbike are more popular. Bike scores very strong in Flanders. Public transport lags behind in Wallonia. Compared to 2024, electric bikes have gained popularity, esp. in FL and BXL.

## Transport use - intention

		2024	Flanders A – (n=624)	2024	Brussels B – (n=106)	2024	Wallonia C – (n=270)	2024
Car		83%		83%		76%		86%
On foot		70%		74%		75%		59%
Public transport		54%		54%		72%		46%
Bus/Tram/Metro		41%		40%		70%		32%
Train		40%		43%		46%		34%
Net: Bike		52%		67%		40%		29%
Traditional bike		30%		39%		24%		18%
Electric bike		31%		42%		26%		14%
Net: step/scooter		8%		8%		17%		5%
(Electric) scooter		2%		2%		6%		2%
(Electric) step		5%		4%		10%		3%
(Electric) motorbike		3%		3%		9%		1%
Taxi		7%		7%		20%		3%
Other		2%		1%		2%		3%

Only 15% plans to change their behaviour in the next couple of years, which is in line with previous years. Almost 4 out of 10 of them thinks this will impact their budget spent to mobility in a positive way, 21% of them expects their mobility spendings to increase.







# Relationship between Belgians and their cars

# Relationship between Belgians and their cars

## **Car remains king for Belgians.**

### **Car ownership in Belgian households is high and has barely changed.**

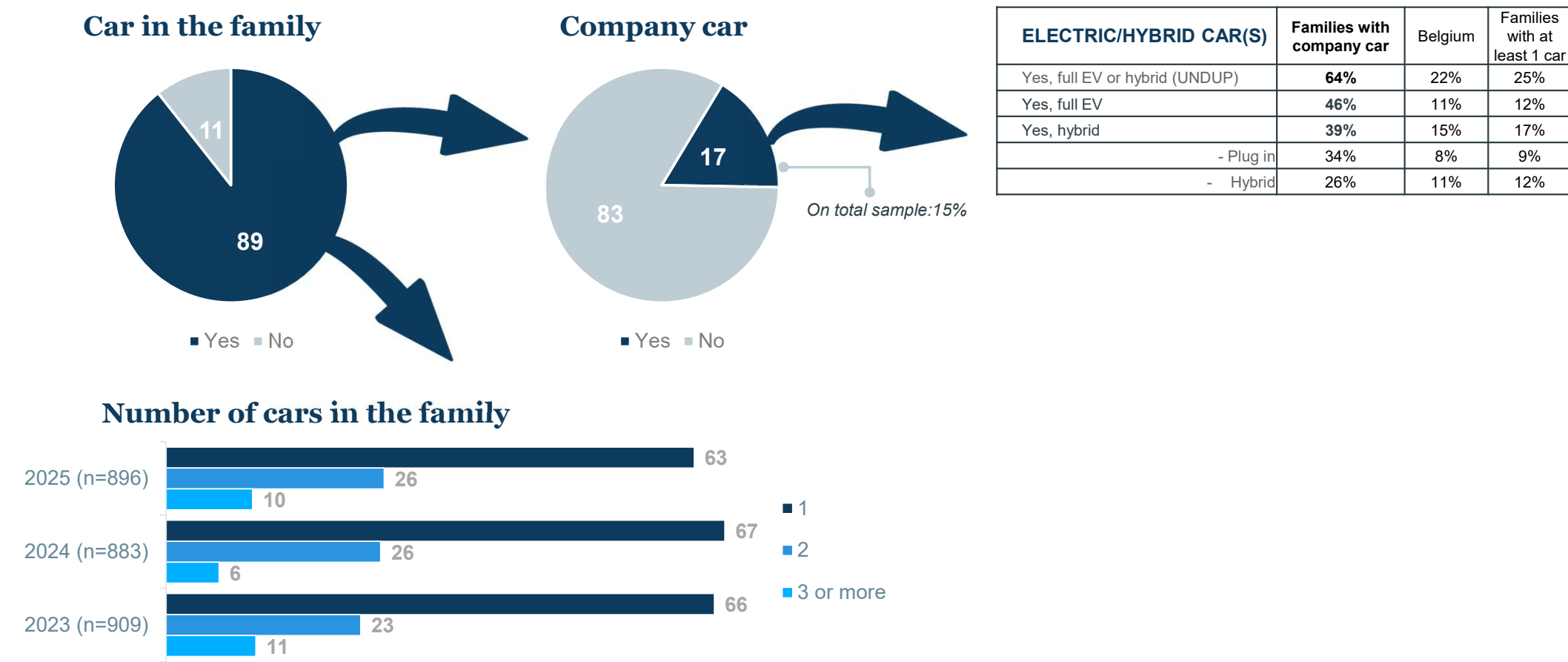
- 89% of Belgian households has at least 1 car in the family (36% has even 2 cars or more available).
- the cars in the household are mostly in own possession
- 17% of Belgian families with a car have a company car, which is in most cases (64%) an electric/hybrid car. In most families, this is accompanied by at least one other car.

### **There seems to be very little interest to abandon the car in the near future.**

- only 1 in 10 Belgians would consider not having a car at all. This number remains stable over the years.
- however, the openness to reduce the number of cars in the household seems to be higher (28%) and growing. Cost and no need for an (extra) car are they key drivers for this.

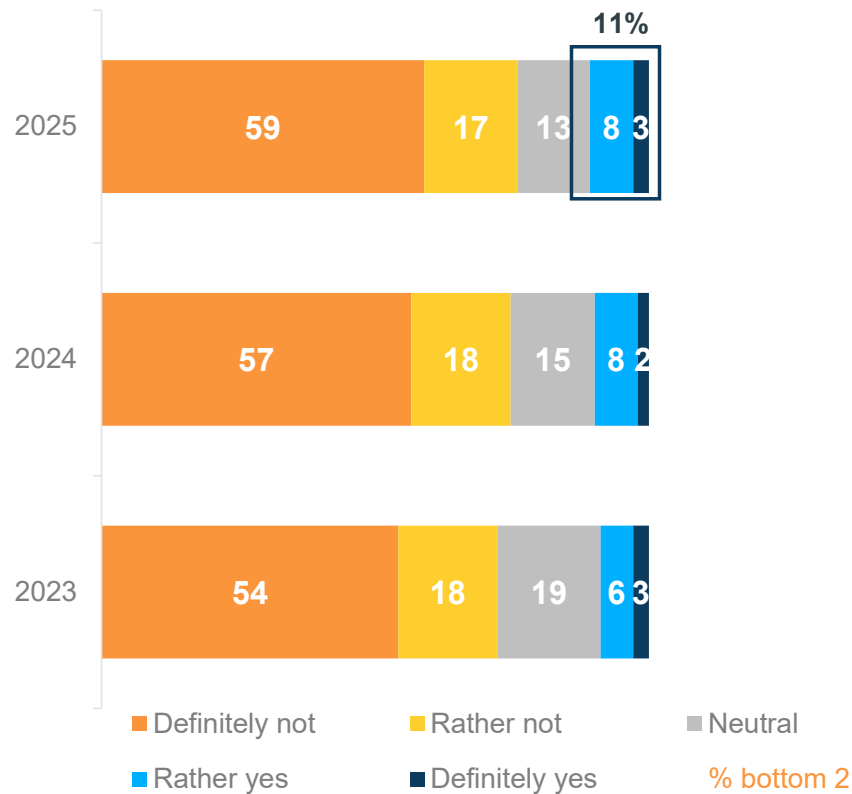


In line with 2024,almost 9 out of 10 Belgian households has at least 1 car in the family. Most of them have 1 car, 1/3 owns multiple cars. 17% of families with a car is having a company car, which is in most cases (64%) an electric/hybrid car.

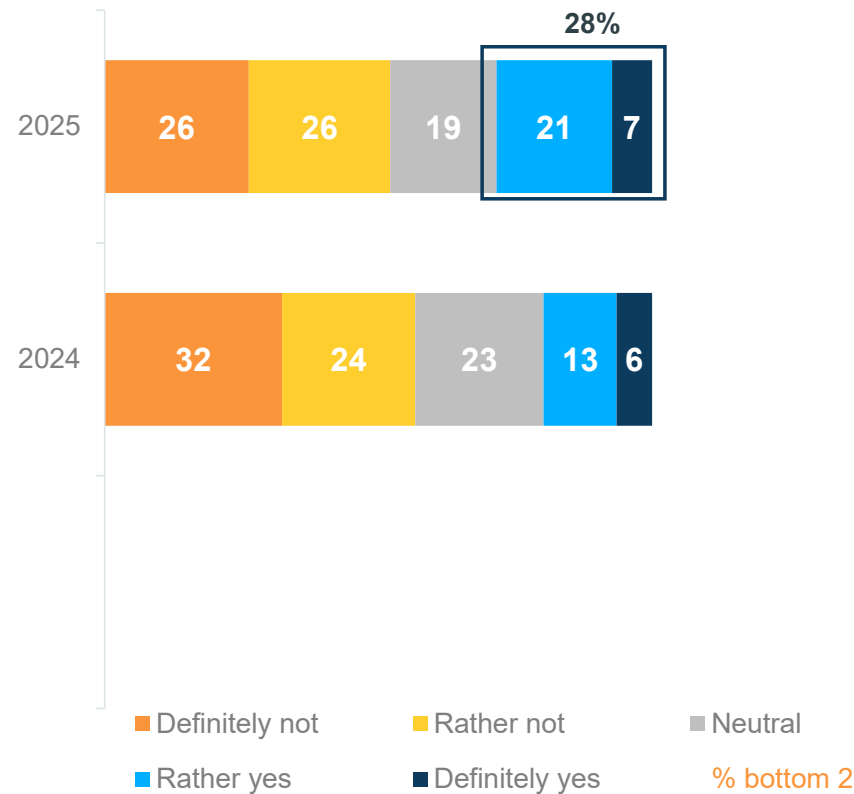


Belgian families with a car are quite hooked to their car: only 1 in 10 would consider not having a car at all. This number remains stable over the years. However, the openness to reduce the number of cars in the household seems to be higher and growing: 28% of the multi-car owners is open to keep only 1 car (which is higher than last year).

Consideration not having a car at all  
(among current car owners)

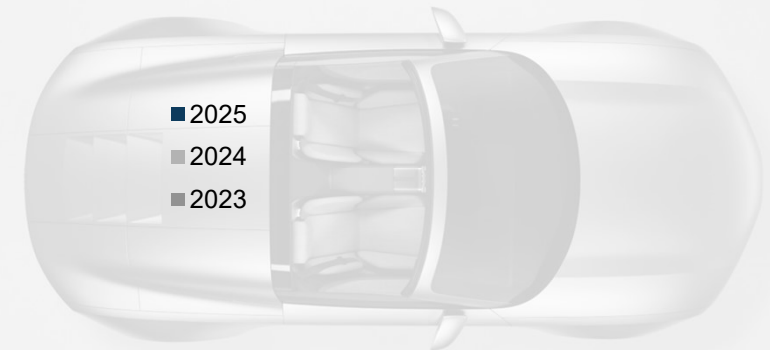
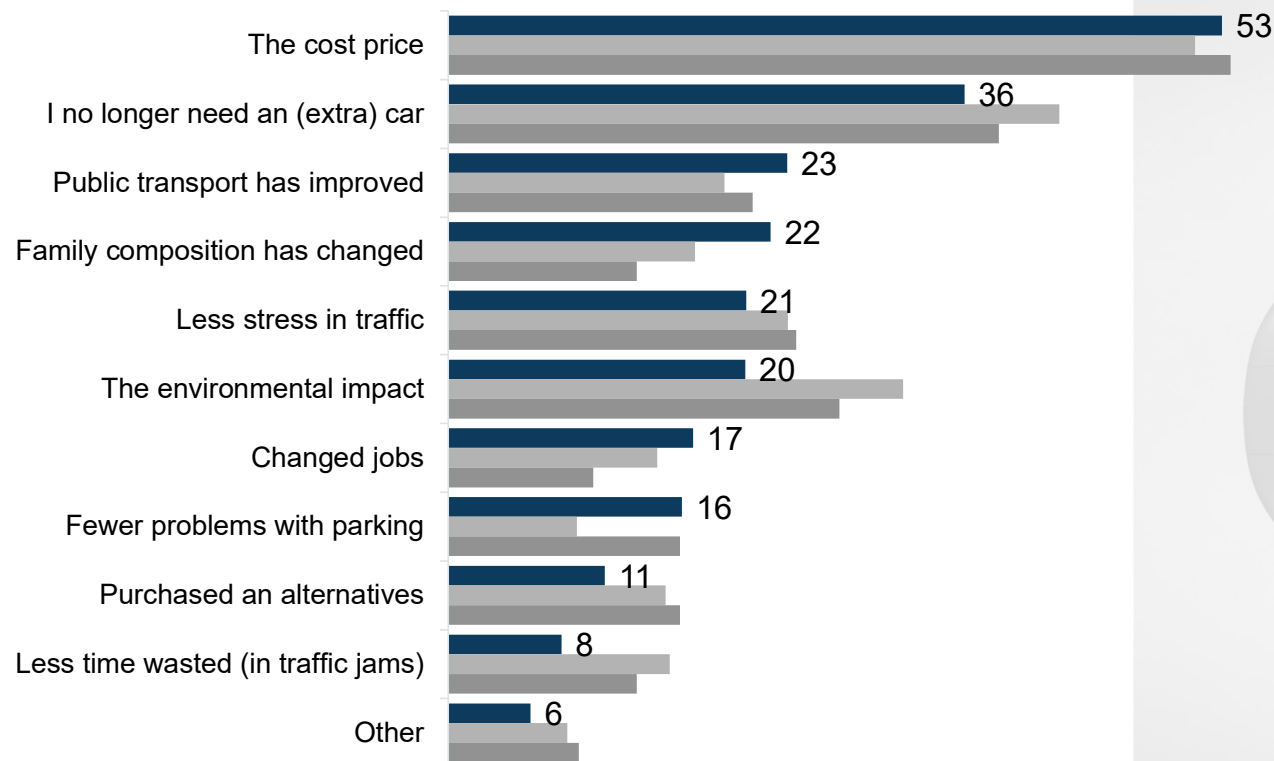


Consideration keeping only one car  
(among multi car owners)



For people considering to give up one or multiple cars, the cost remains the most important driver to abandon the car, followed by the lack of the need of an (extra) car.

### Reasons for giving up one or multiple cars







# Electrification of cars & charging stations

# Electrification of cars & charging stations (1)

**The further expansion of electric cars is still facing several challenges.**



## **Interest in electric cars has not further increased**

- 39% of the Belgians is intending to consider an electric car as their next purchase
- while the interest in thermic cars is clearly higher (72%) and remains intact.

## **The same key barriers as in 2023 and 2024 remain**

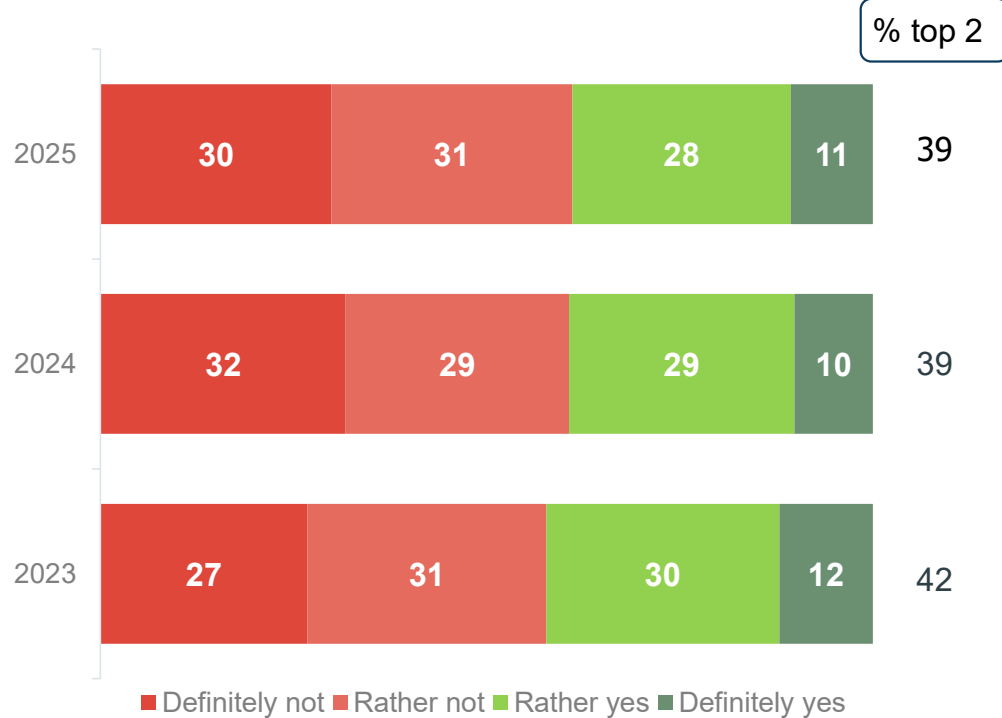
- The electric car lacks convenience & the cost (although the offer is larger & there are more basic models on the market), is still too high.

## **Belgians seem to have become more demanding regarding charging stations & places**

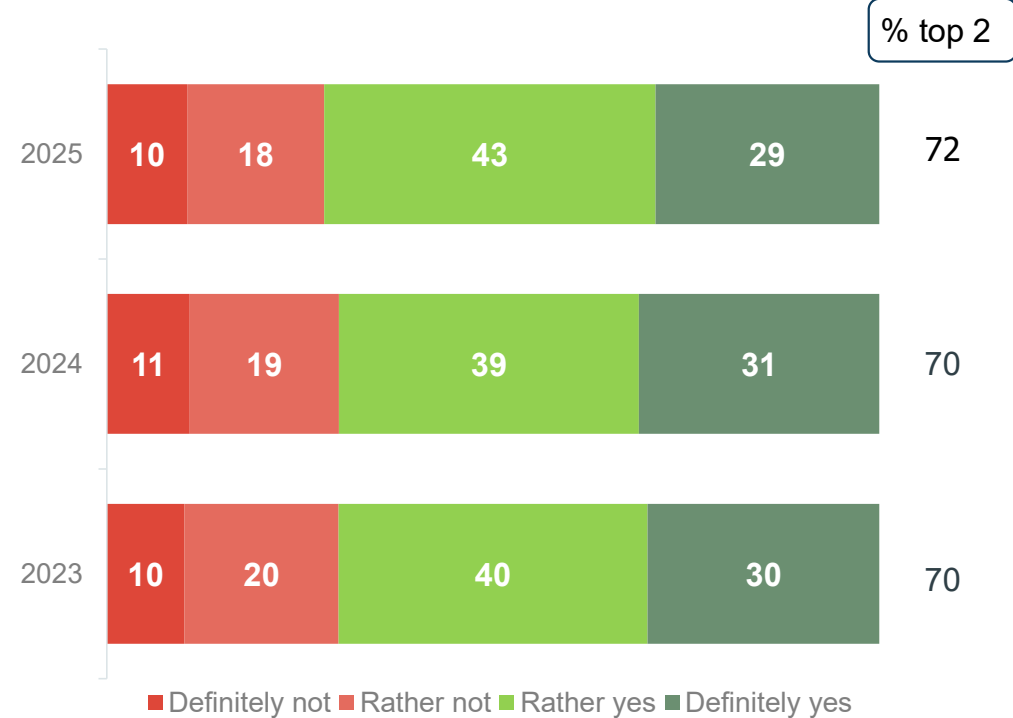
- Private charging facilities are crucial: most current EV drivers have this (and also use it), non-EV drivers would install this. Solar panels are still a catalyst for this.
- Sufficient public charging stations (only) will not be able anymore to convince the group of non-EV drivers.
- In any case, charging stations should be near enough (50% wants to have one in less than 1 km distance).

Only 4 out of 10 Belgians consider an electric car if they would have to buy a new car, which is comparable to 2024. Simultaneously consideration of a thermic car remains high, revealing a barrier in the expansion of electric cars.

### Consideration electric car

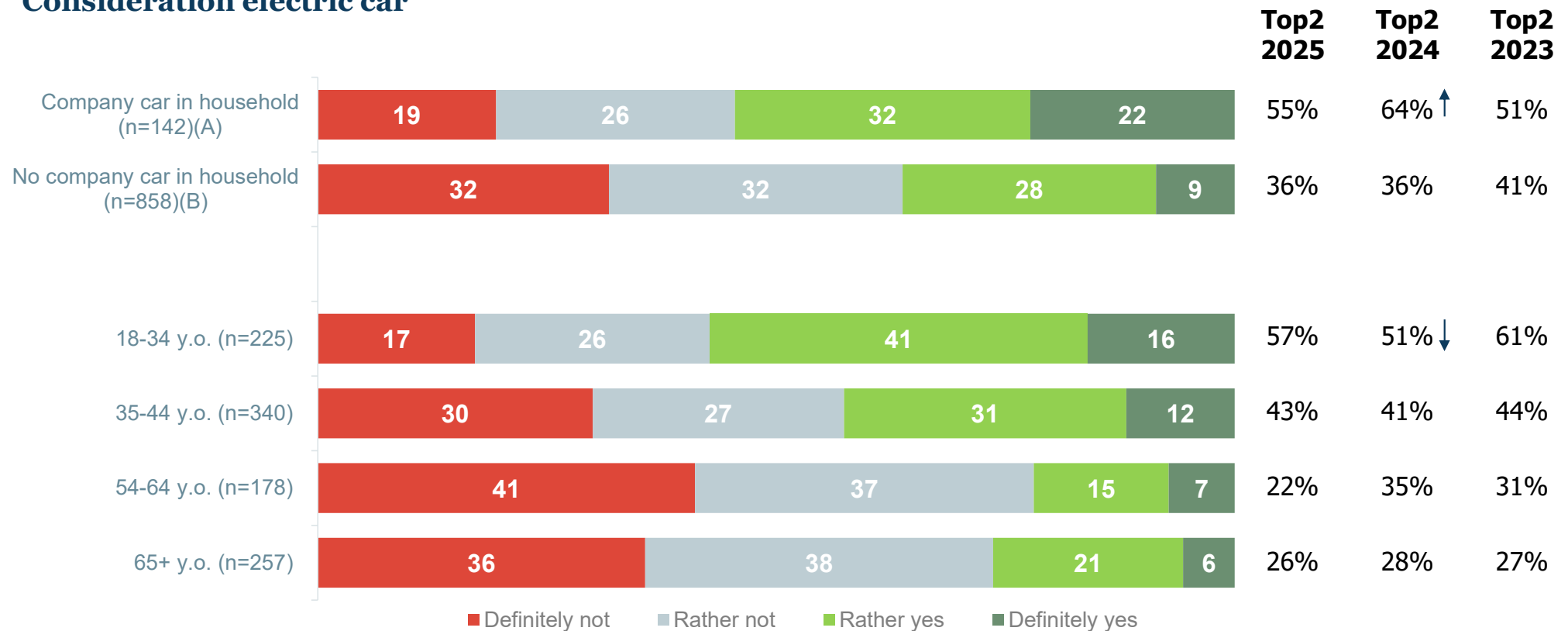


### Consideration thermic car



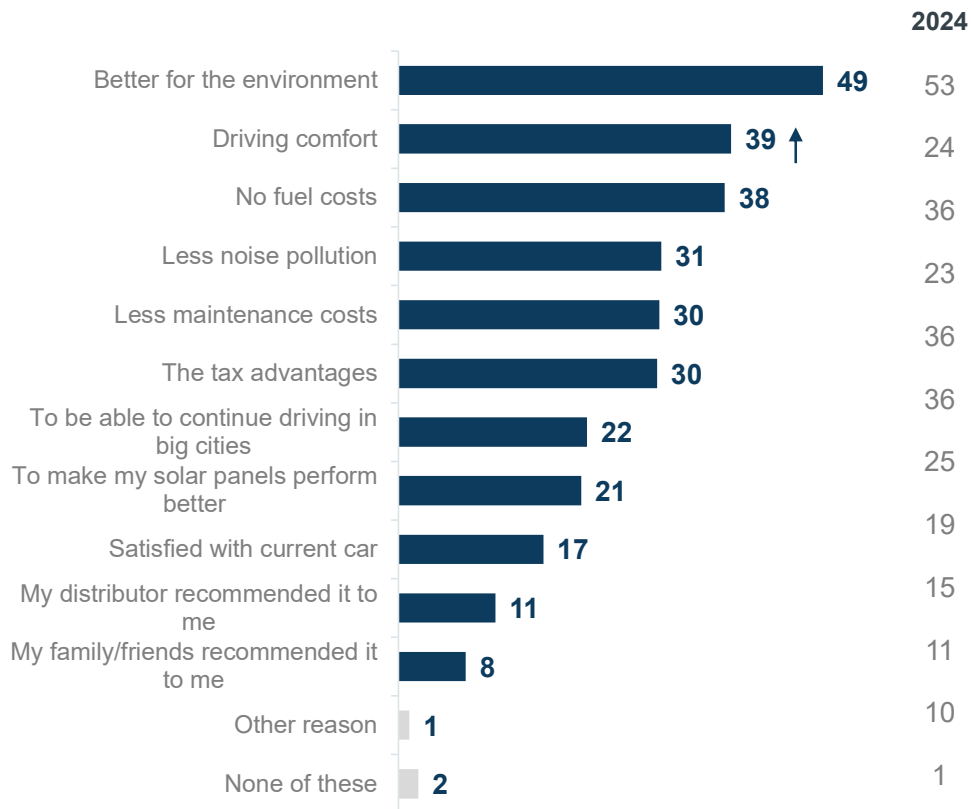
Intention to consider an electric car is the highest among people with a company car in the household, but this has decreased vs 2024. Younger age groups are most convinced to make the switch and are back up after a decreased interest in 2024.

## Consideration electric car



The environmental impact is still the most important driver. Comfort has gained importance compared to last year and is now the nr. 2 reason. The main obstacles remain the high purchase price (even though this decreased vs 2024) in combination with a limited driving range.

### Drivers to consider an electric car



### Barriers to consider an electric car

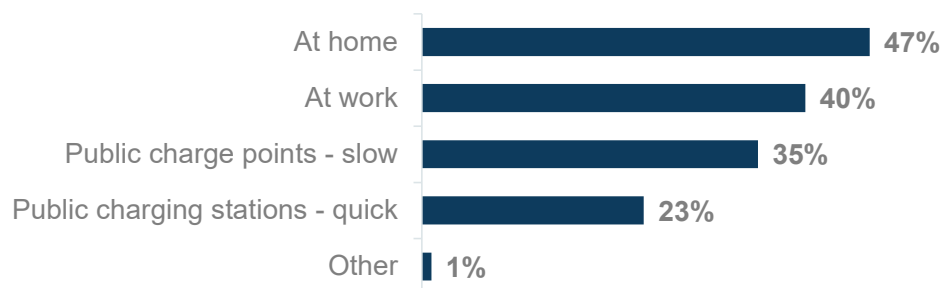


💡 The key barriers to consider an electric car are also the key drivers to consider a thermic car.

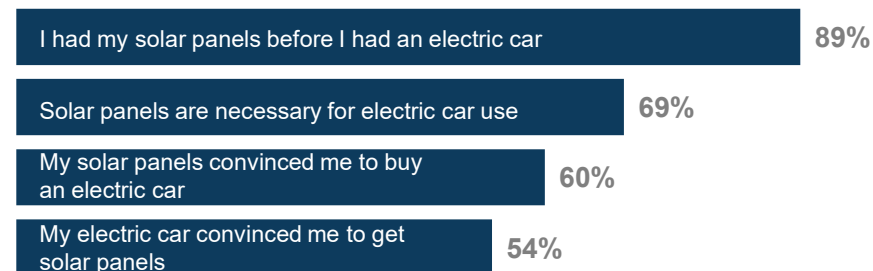


Current EV drivers charge in different places: at home (47%), at work (40%) or at slow public charging points (35%).

### Charging places



### Link with solar panels

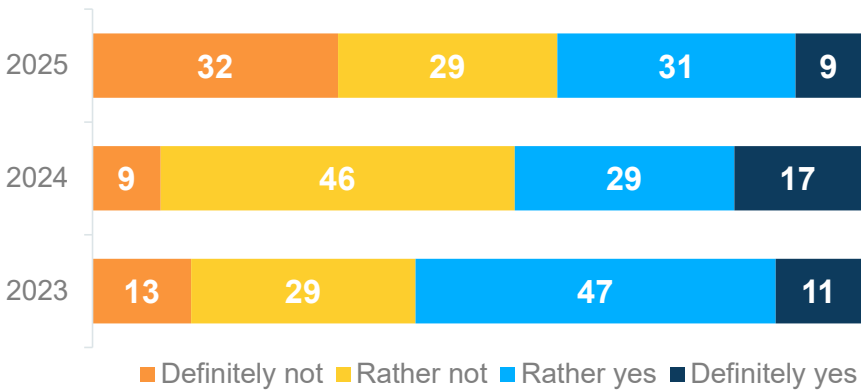


Base: People that have an electric car (n=99) / People that have an electric car and solar panels (n=46)

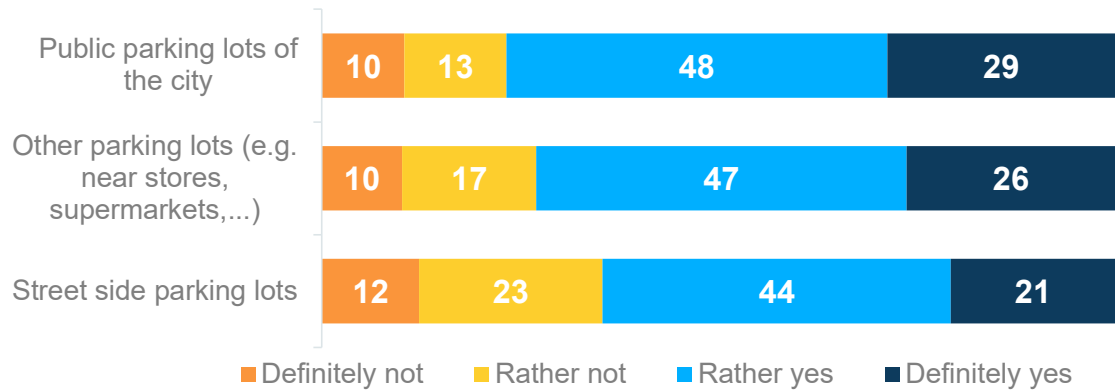
Question: Q3.13C Where do you usually charge your electric car? I Q3.13B You indicated that you have solar panels and also have an electric car with a charging station at your home. For each of the following statements, indicate whether it applies to you or not. I Q3.13D Of your total number of charging trips, what % do you do through the following types of charging stations to charge your electric car? I Q3.13E1 Which way(s) do you currently pay for your charging? I Q3.13E2 Do you have an idea of the price per kWh or the average cost of a charge?

Contrary to previous years, installing more public chargers is not really impacting the openness towards EV. And in any case, charging stations should be near enough (49% wants to have one in less than 1 km distance). Meanwhile, people expect charging stations to be “everywhere”, close to parking lots and street sides.

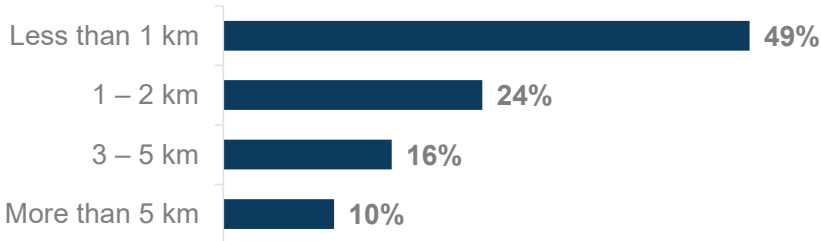
### Impact of public chargers



### Expected location of charging station



### Expected distance to charging station



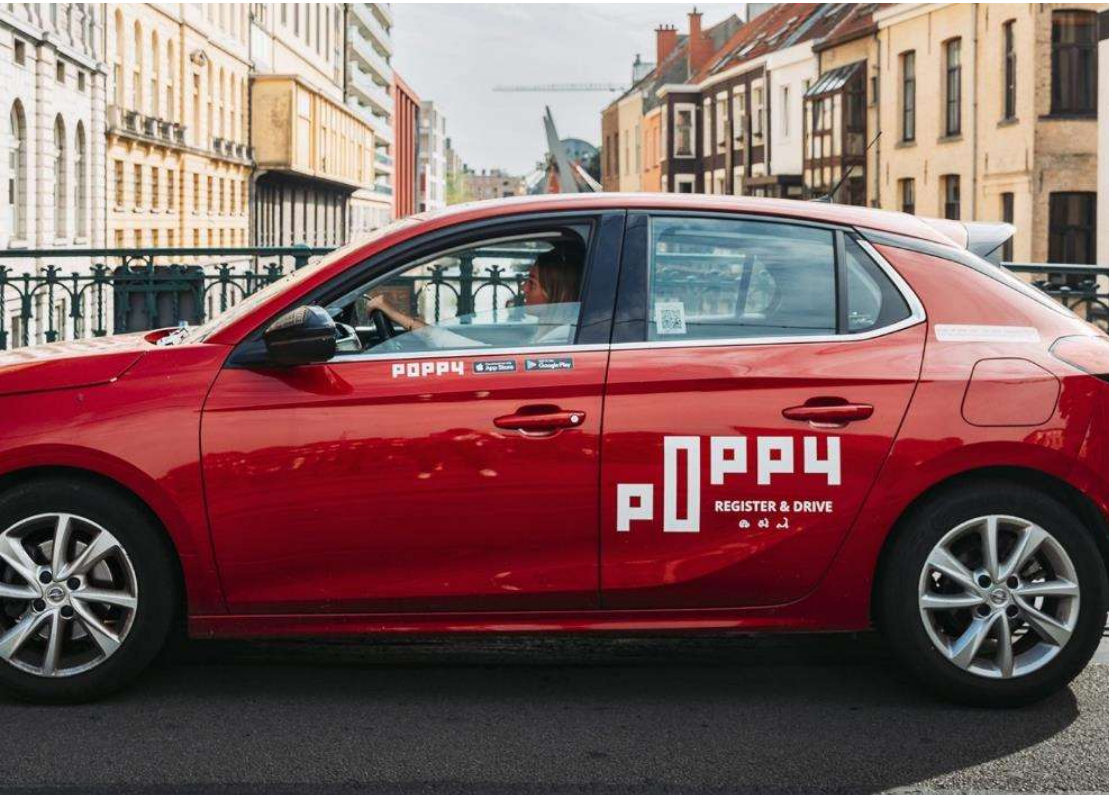
Base: People without driveway / garage that have no electric car yet (n=169) | People that have no electric car yet (n=779)  
 Question: Q3.9 Suppose your municipal or city government in your town or city provides a generous number of charging stations in various locations at a price that is reasonable for you to charge your car. Would this convince you to purchase an electric car? / Q3.10. To what extent do you expect your municipal or city government to provide charging stations for electric cars at the following locations? / 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?



# Shared mobility

# Shared mobility

**The adoption rate of shared mobility seems to be stagnating.**



**The usage of shared mobility remains rather low.**

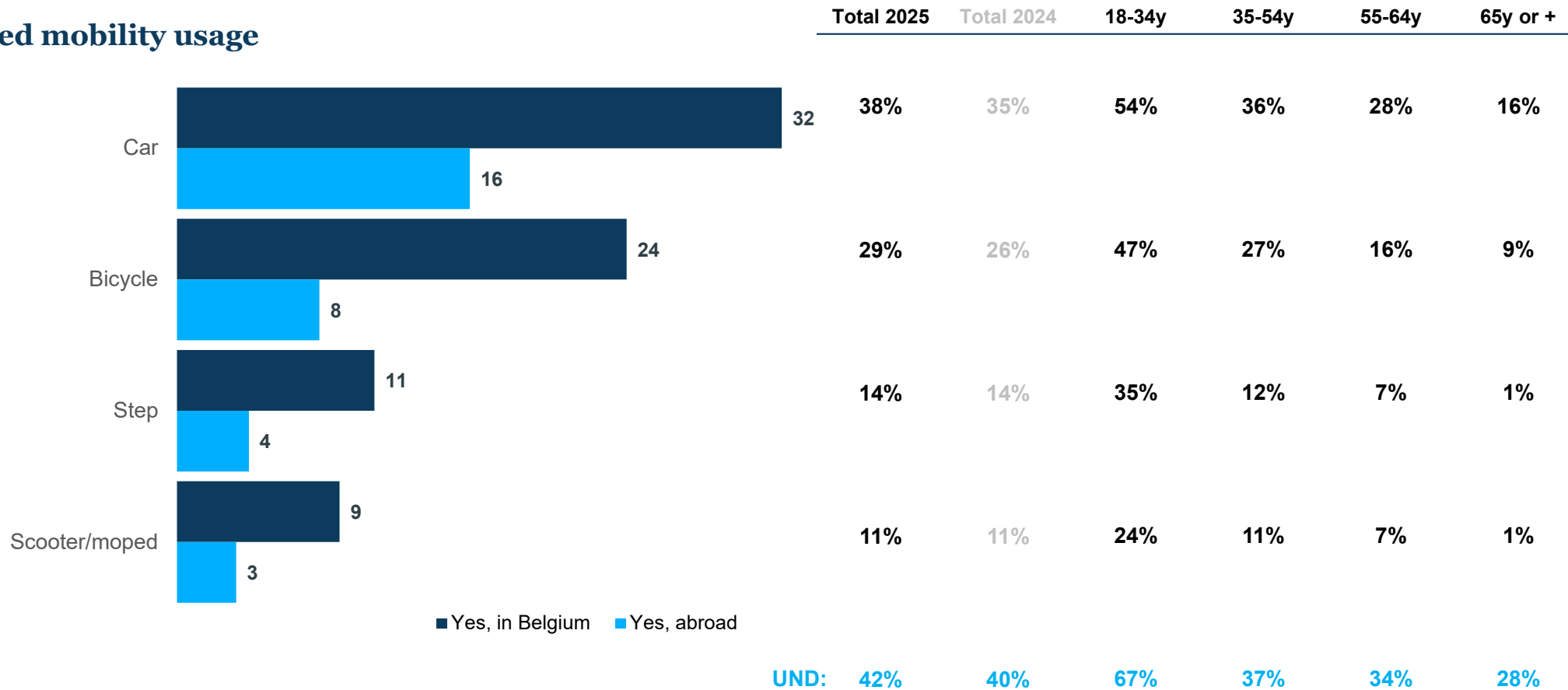
- 4 out of 10 Belgians have used a shared mobility service in the last year, mostly cars and/or bicycles. This is in line with 2024.
- Shared mobility services are far more popular among younger generations and in urban regions.

**And it looks like this is not likely to change on short term**

- The intention to use shared mobility solutions remains stable compared to last year, with 63% not considering doing this.
- We also see low consideration of people for sharing their own car. The main barriers are fear of damage and lack of trust in other drivers.

4 out of 10 Belgians already used a shared mobility service, mostly cars and/or bicycles. This is in line with 2024. Shared mobility services are far more popular among younger generations.

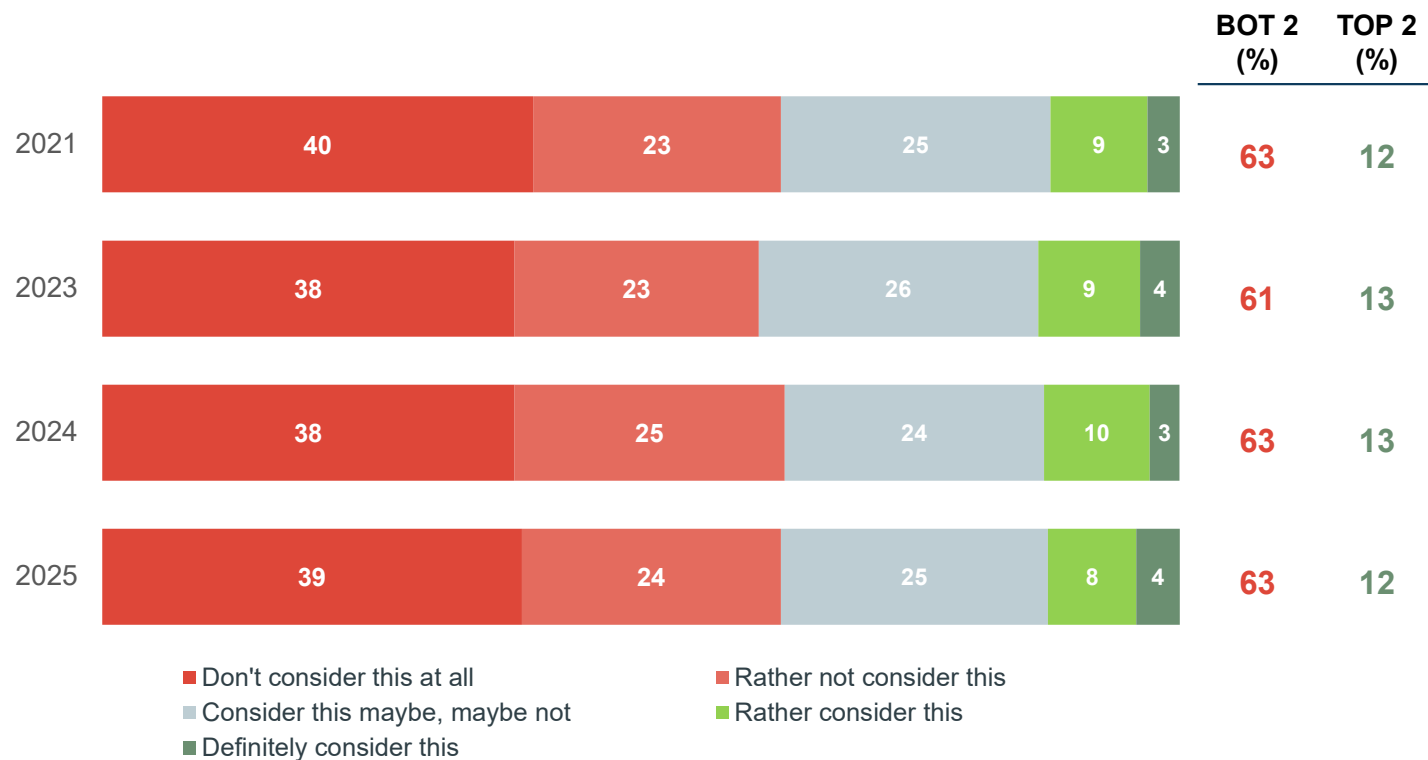
## Shared mobility usage





The intention to use shared mobility vehicles remains stable compared with past year, with 63% not considering doing this.

## Intention to use shared mobility in the future





# Mobility budget

# Mobility budget

**The concept of ‘mobility budget’ is quite well known but not fully exploited yet.**



**There is already a good awareness about the mobility budget**

- about 2/3 of the Belgians are aware of this concept

**Yet the step to full understanding & common usage is to be taken**

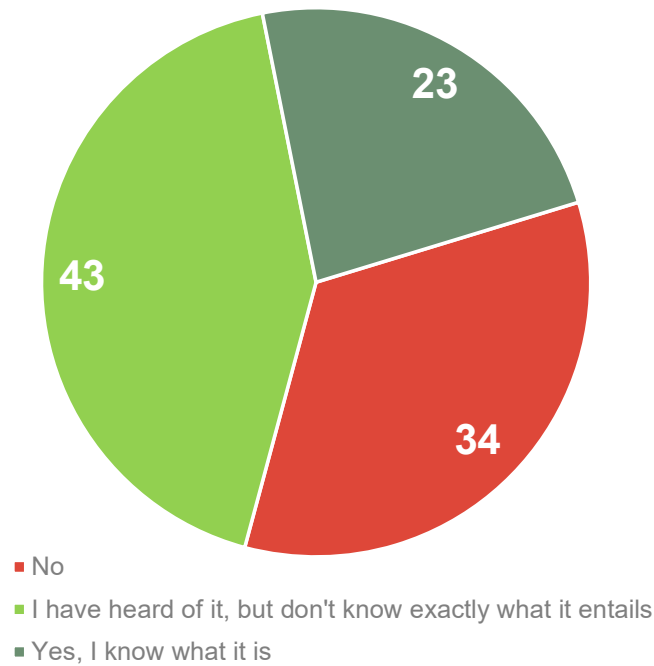
- only 23% truly understands what it entails
- only 5% is using it already

**In a mobility offer from the employer, the car remains crucial.**

- the interest to have a car remains high (85%)
- respondents would allocate 37% of their mobility budget to an environmentally friendly or smaller car, followed by cash (29%). Younger people are more interested in bike leasing, shared car/bike and rent/loan repayment, while 55+ are more interested in a car or cash.

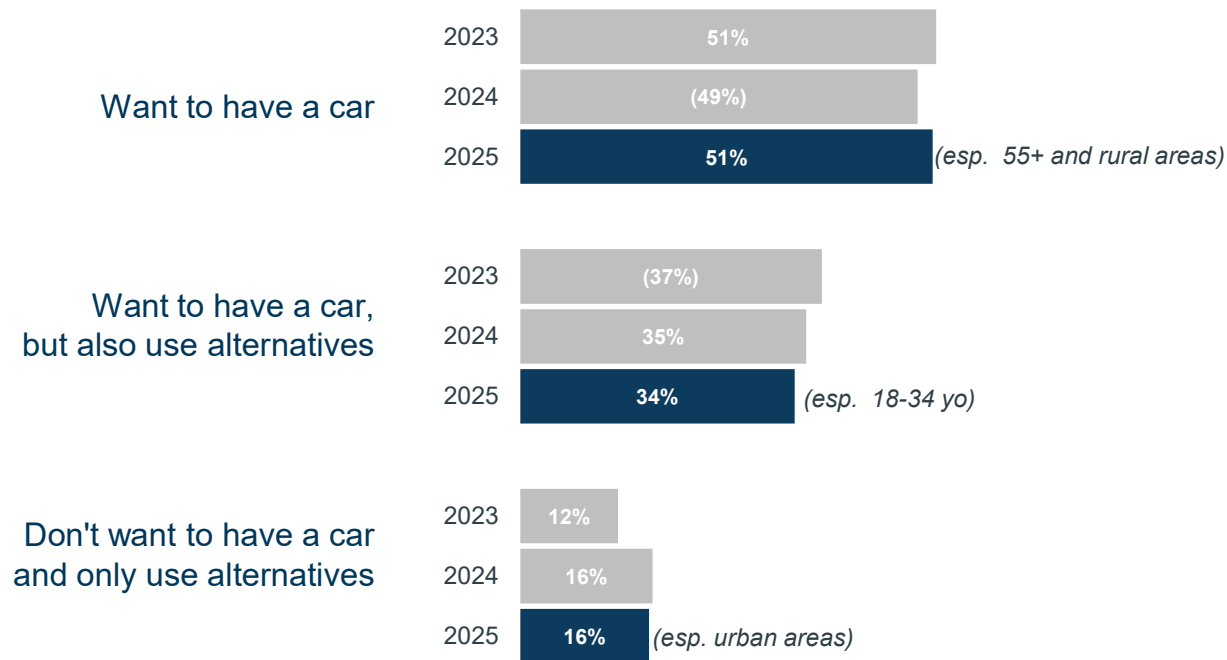
About 2/3 of the Belgians are aware of the concept of a mobility budget, but only 23% truly understand what it entails.

## Knowledge



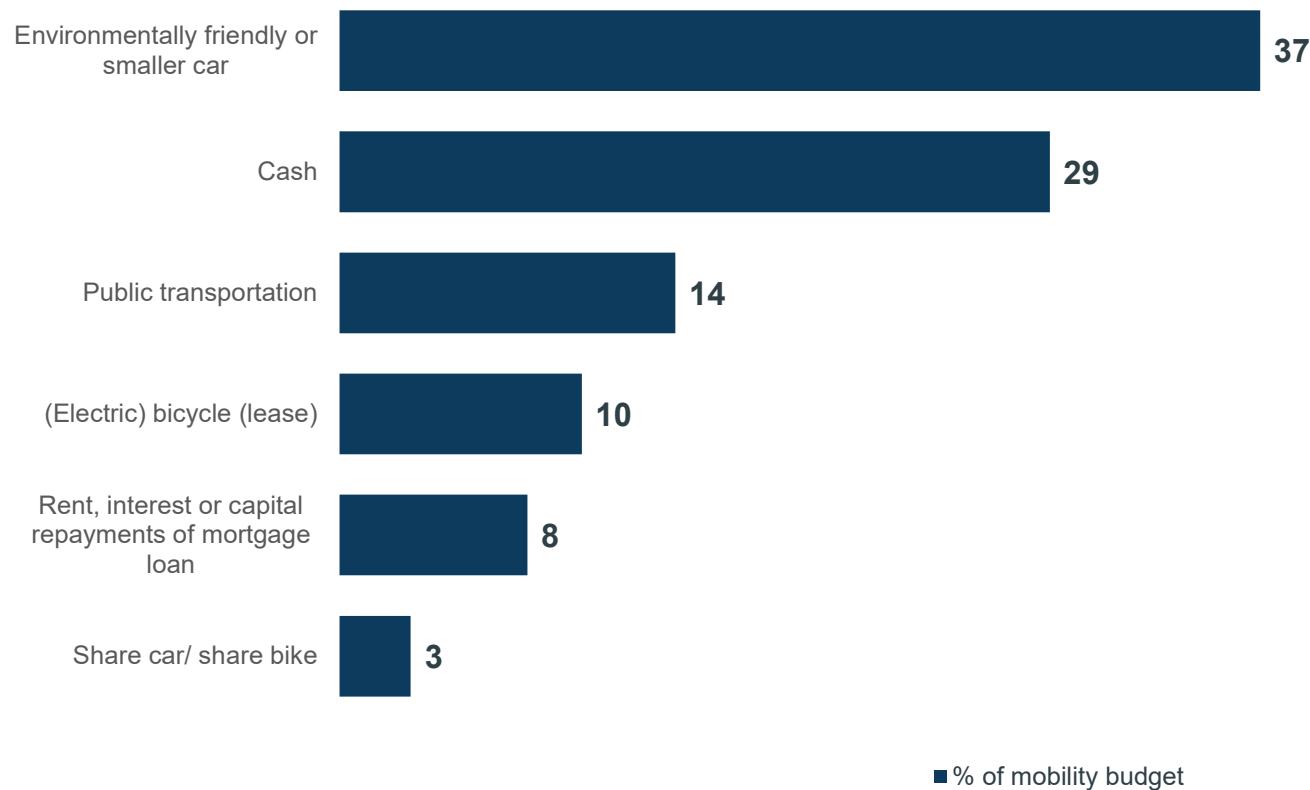
In a mobility offer from the employer, the car is crucial. Due to the willingness to use alternatives as well, especially among younger aged people, flexibility becomes an asset. There's almost no difference when comparing previous years with 2025.

### Preferences if mobility budget would be offered



Respondents would allocate 37% of their mobility budget to an environmentally friendly or smaller car, followed by cash (29%).

### Preferability allocation



## 3.2 B2B insights (Fleet insights)

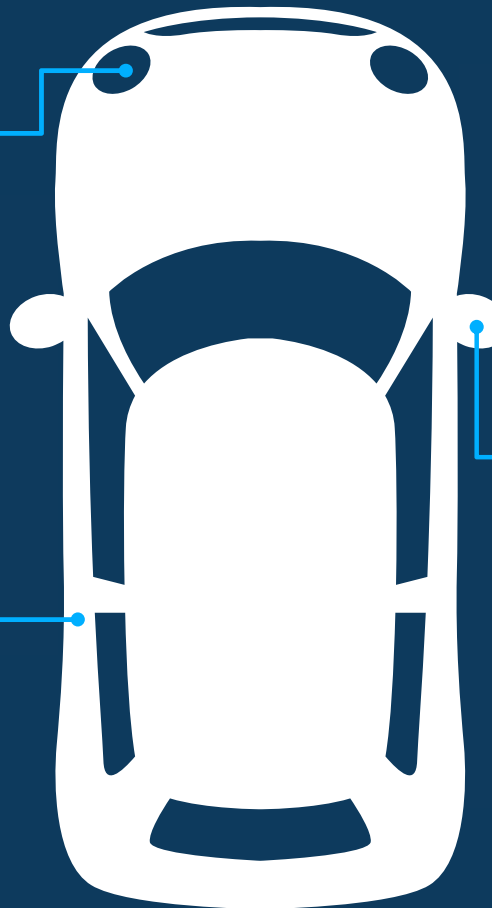
Fleet Composition,  
electrification & brand  
preference



Future trends



Charging infrastructure,  
mobility services &  
management







# Fleet composition, electrification & brand preference

# Fleet composition, electrification & brand preference

**Electrification of the fleet accelerates with D'Ieteren brands maintaining a strong presence in the fleet of companies.**

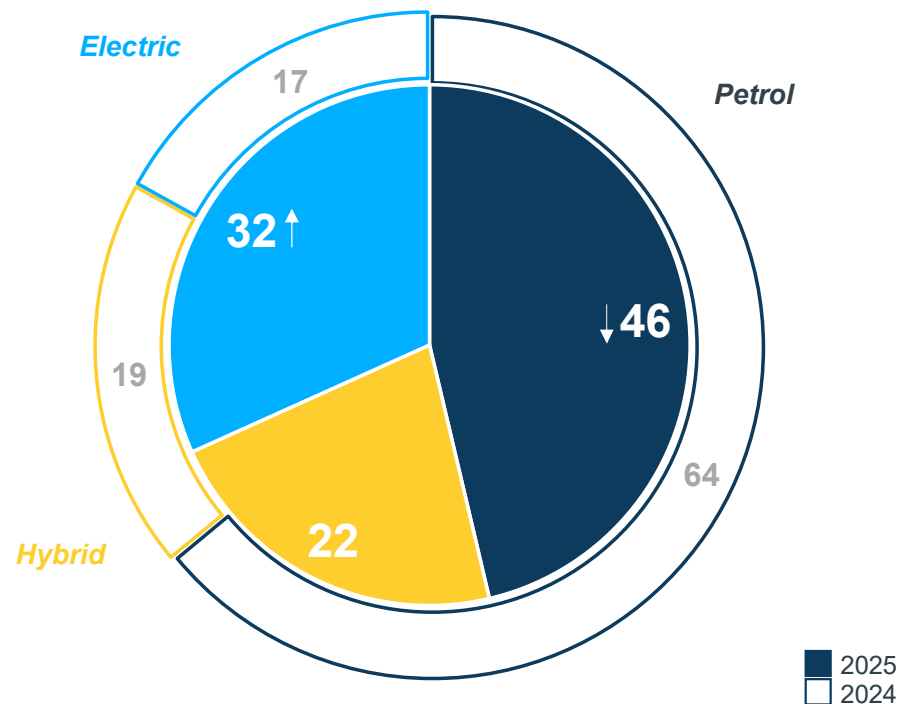


## **Electrification is accelerating:**

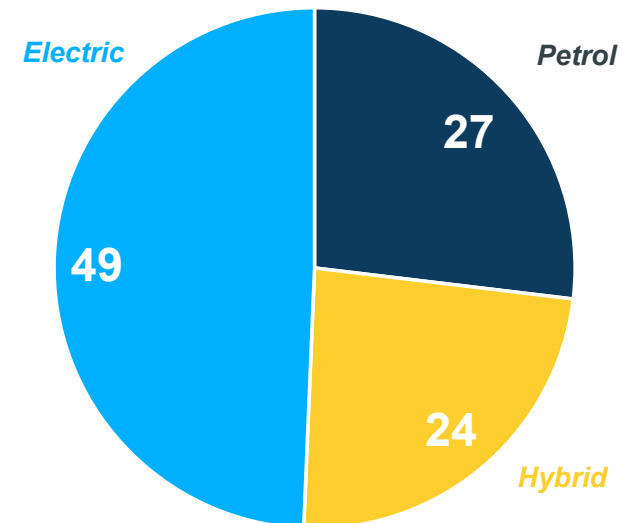
- EV share increased significantly from 17% in 2024 to 32% in 2025. Petrol vehicles are declining sharply, while hybrid use remains stable.
- Flanders remains leader in EV adoption: with 36% of fleet cars already fully electric.

The shift to electric company cars is accelerating, with their share rising from 17% in 2024 to 32% in 2025. Petrol cars are declining, while hybrid use remains stable. Flanders leads the way, with 36% of fleets already fully electric. In two years, companies expect EVs to make up nearly half their fleets.

**Current Fleet Composition**



**Expected Future Fleet Composition**





# Charging infrastructure, mobility services & management

# Charging infrastructure, mobility services & management

**Rising interest in mobility budgets, home charging contributions, bike leasing and MaaS platforms.**



## **Mobility offer insights:**

- The amount of companies that offer a mobility budget or alternative mobility solutions has increased significantly compared to last year.

## **Mobility budgets:**

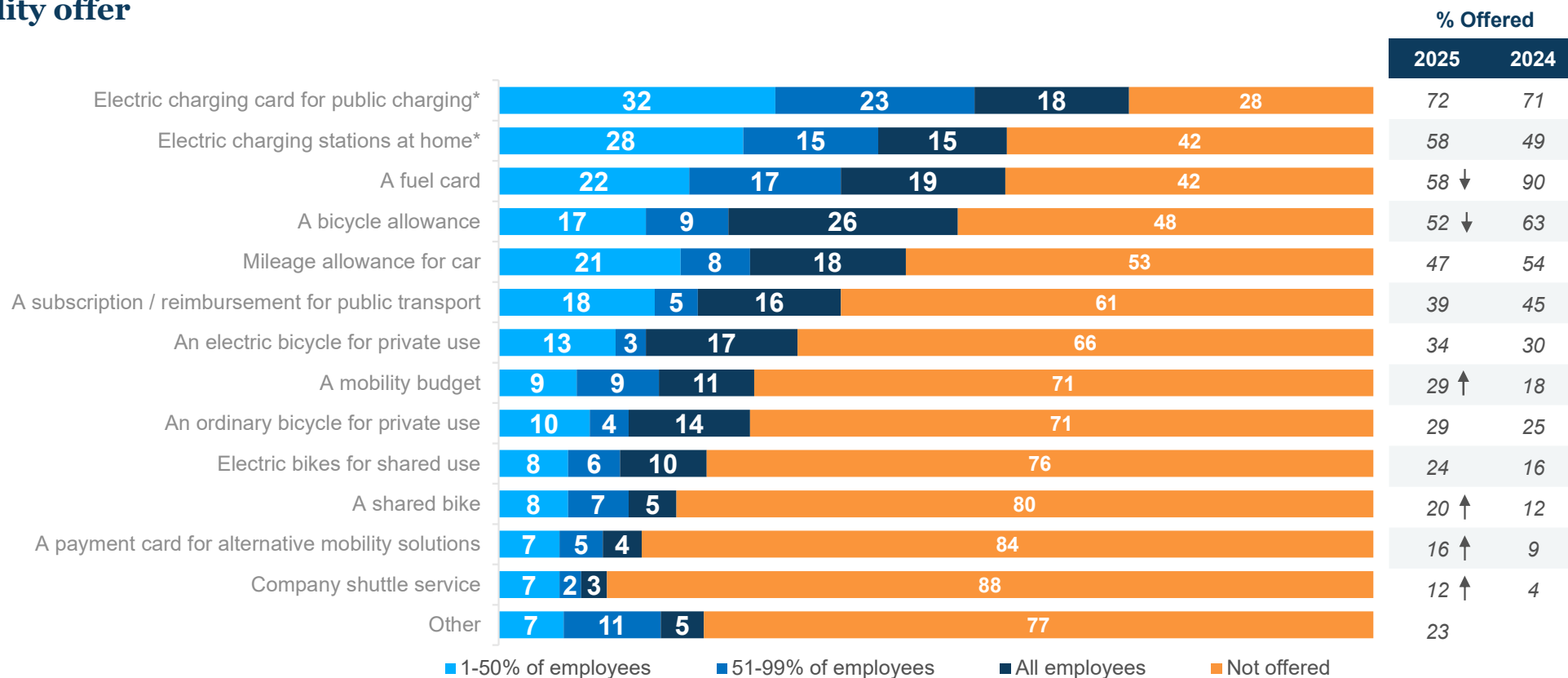
- Despite the increase vs 2024, 50% still don't consider implementing a mobility budget.
- The main reason for not offering a mobility budget (yet) is a perceived lack of interest or demand from employees.
- Attitudes of fleet managers towards a mobility budgets remain overwhelmingly positive, though most employers still believe employees prefer car ownership.
- Future adoption depends on clear and understandable documentation for the general public and legal/tax guidance.

## **Bike leasing:**

- Growing (36% in 2024 to 41% in 2025) mostly consisting of electric bikes

Among companies with electric cars, the offering of home charging stations remained stable vs 2024 (58%), demonstrating that a new electric car is not more likely to come with a home charging solution than last year. The amount of companies that offer a mobility budget or alternative mobility solutions however has increased significantly compared to last year.

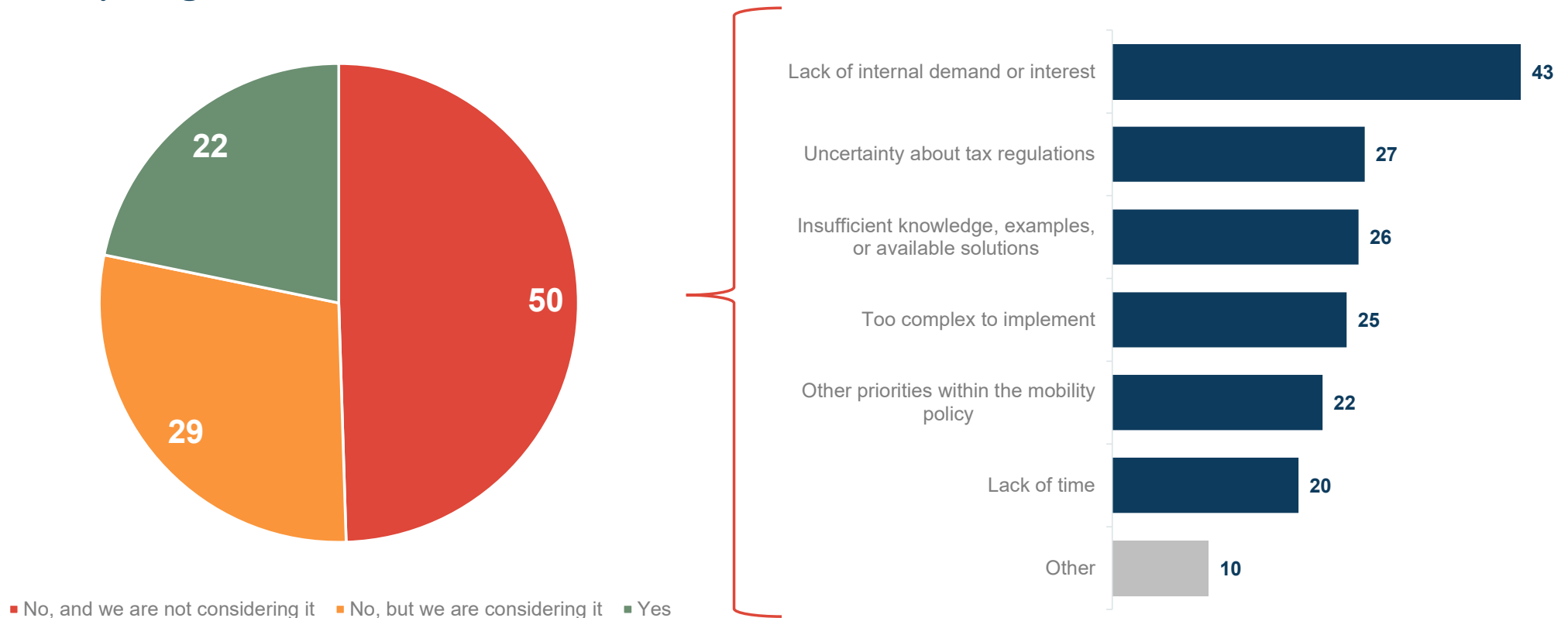
## Mobility offer



\* Only if EV

The majority of companies (78%) does not yet offer a mobility budget, with 50% stating they are not even considering it. The main barrier is a perceived lack of internal demand or interest, followed by uncertainty around tax regulations and insufficient knowledge. Mbrella might be a solution to tackle some of these barriers.

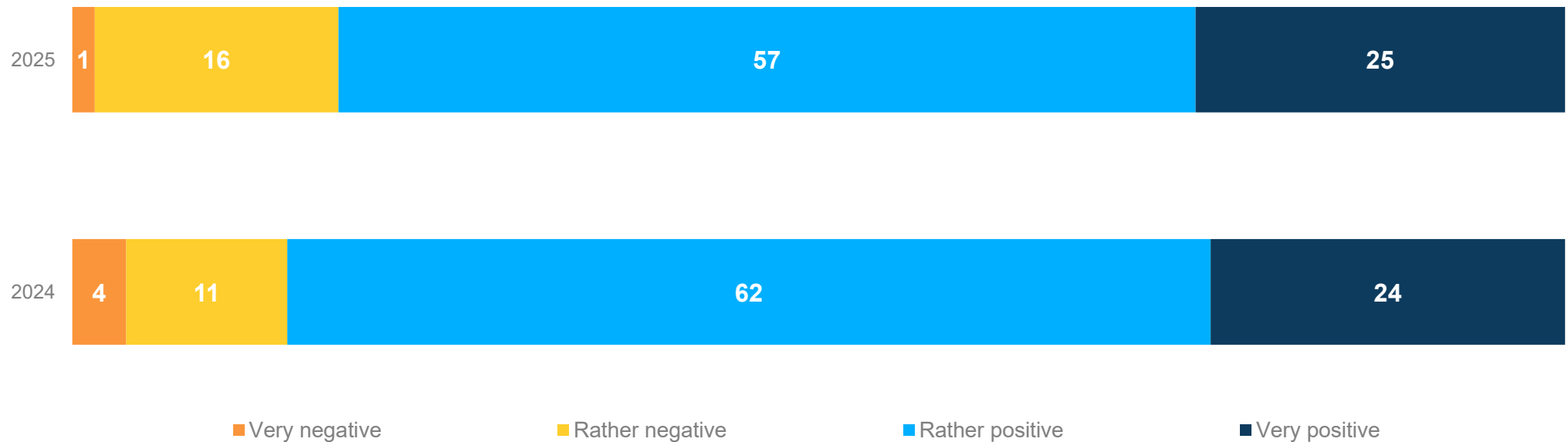
### Mobility budget offer





Despite the decrease in the share of respondents expecting employees to also use alternatives, overall attitudes toward the mobility budget remain overwhelmingly positive.

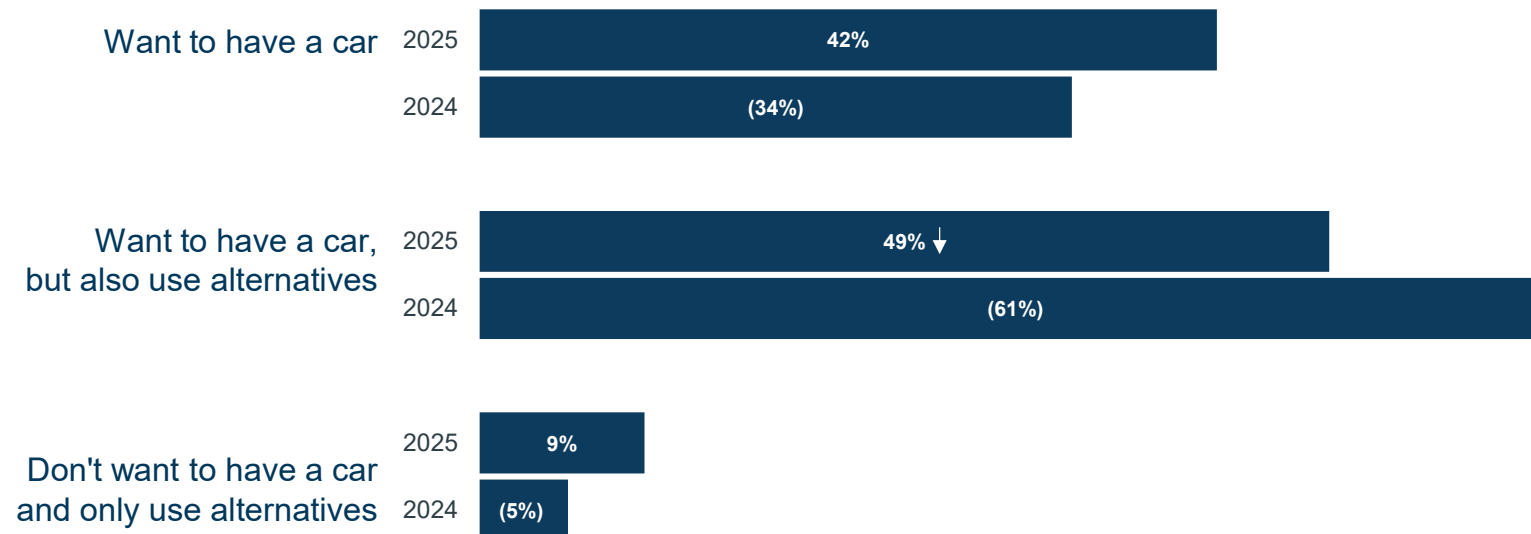
### Attitude towards mobility budget



Base: Total sample (n=202)  
Question: Q3,2b Imagine tomorrow there is a mobility budget for everyone within which each employee can choose:  
- An environmentally friendly company car  
- Or a sustainable means of transport (e.g. public transport subscription, a bicycle ...)  
- Or a disbursement of the budget  
- Or a combination of the three different options  
As a fleet manager, what do you think? Is this positive or negative?

Employers expect that most employees would still prefer to have a car, with or without using alternatives. The share of employees expected to combine car ownership with alternatives has declined compared to last year.

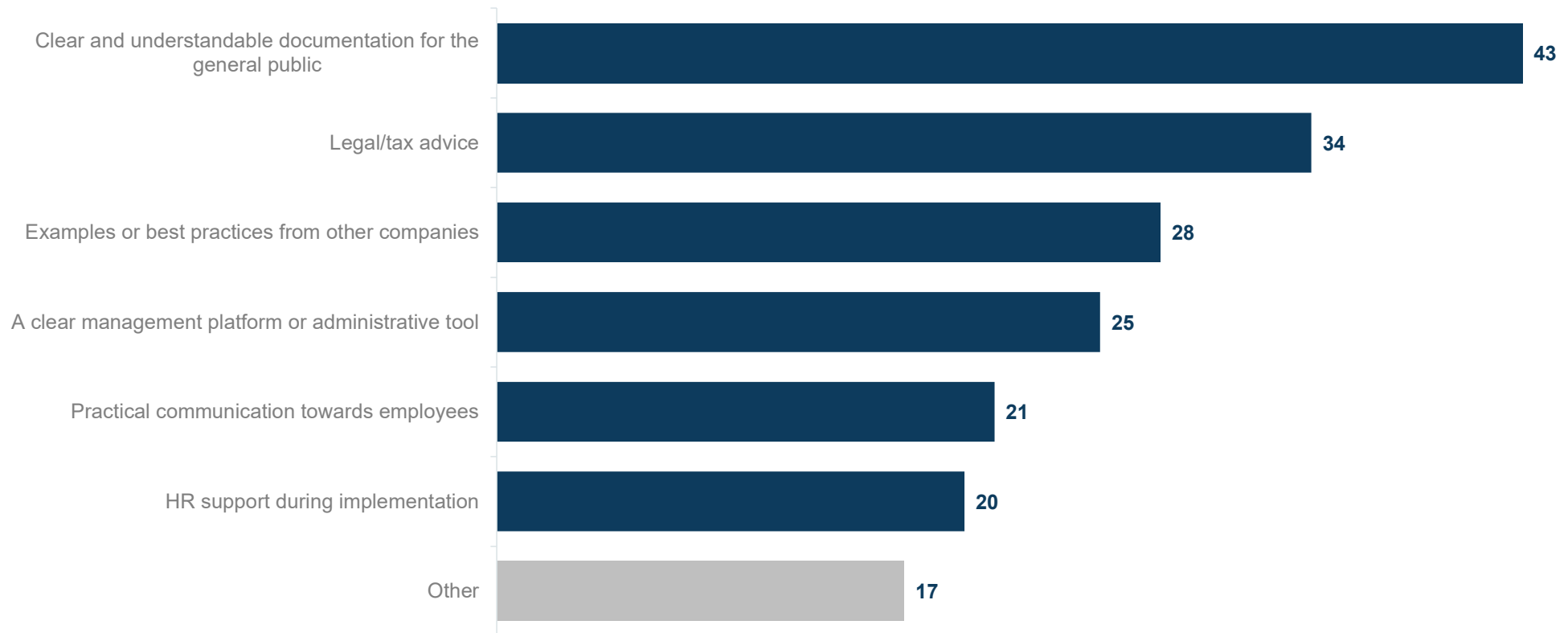
### Mobility budget (from employer)



Compared to what Belgians are saying, fleet managers have a pretty accurate view of what Belgians want.

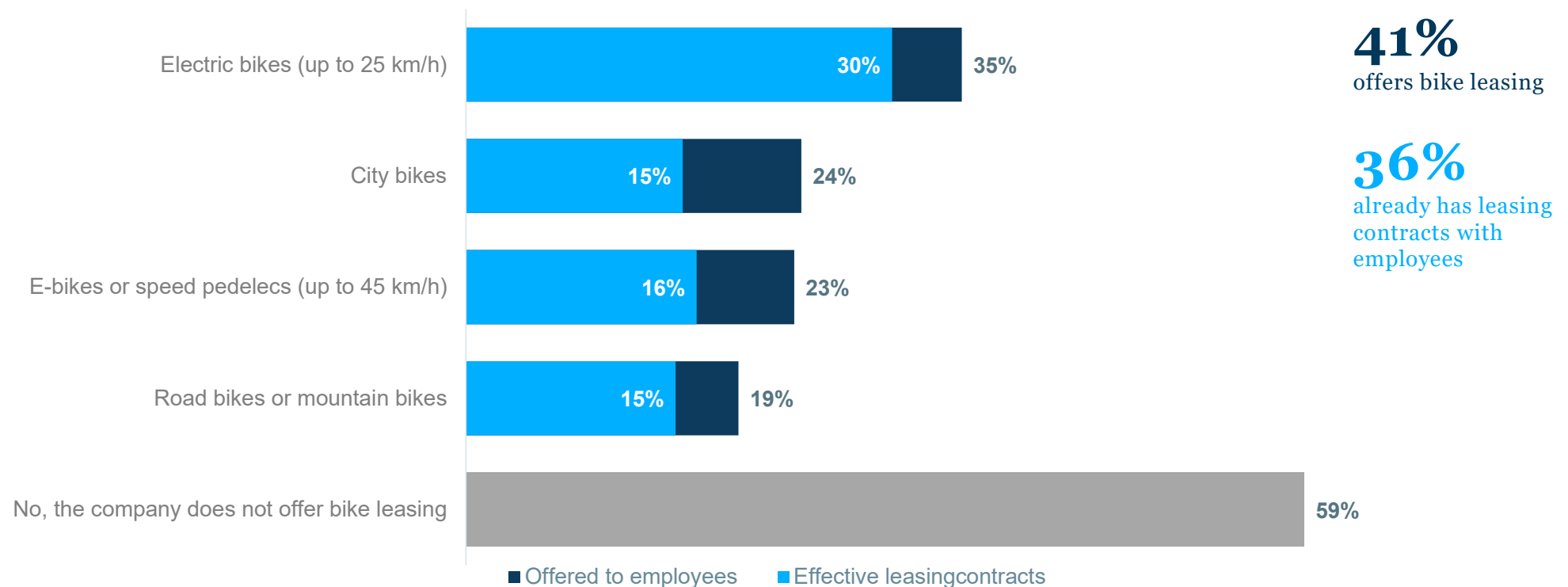
To support future implementation of the mobility budget, companies primarily need clear and accessible documentation for the general public, followed by legal and tax advice.

### Enablers future mobility budget implementation



41% offers bike leasing for employees, which is a slight increase vs 2024. If they do it, it is most commonly offered for electric bikes. Most companies offering it already have effective leasing contracts with employees.

## Bike leasing



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